This desk aid is a print-only document. The detailed steps/information can be found in section 8.6 of the EOIS-CaMS Service Provider User Guide.

EOIS Case Management System
Create and Activate a Service Plan Desk Aid

Step 1: Create a Service Plan from a template.

Step 2: Create a Client Summary.

Step 3: Add Sub-Goal(s) (**Optional step for ES**)

Step 4: Add Plan Item(s) to Sub-Goal(s).

Step 5: Submit Service Plan for Approval.

Step 6: Create Plan Summary.

Step 7: Record Acceptance of Plan Summary.