

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.