ALBERTA HUMAN SERVICES
MOBIUS System
Quick Reference Guide – Service Plans

SERVICE PLAN

A **Service Plan** is developed as a result of an assessment. The purpose of the Service Plan is to describe and record the mutual agreement between HS and the individual about *the specific activities to be undertaken to attain the desired goals*. It includes the individual's goal(s), programs and services, and the steps required to achieve their goals.

Individual must be **Registered** on Mobius, have an **Integrated Case,** and should have an **Assessment** prior to completing a **Service Plan**.

This Quick Reference Guide will focus on activities performed as part of service planning and management, and interactions with other areas of Mobius.

CREATE A SERVICE PLAN

1. From the **Integrated Case Home** page, select the **Service Plans** tab.
2. If a Service Plan **does** exist, you will **add** additional Sub Goals and/or Plan items as required.
   - If an open and appropriate sub goal already exists, add plan items. **Do not** create a second sub goal of the same type.
   - There should only be **one** Service Plan (includes Open, Approved, Active status) but there may be several sub-goals and plan items at various stages.
3. If a **Service Plan does not** exist select **New**.
4. Select the **Case Member** and **Type** of **Service Plan** from the drop down.
5. Click on **Save**.
   - To use a template, select **Save and Use Template,** then add/delete plan items as required.
6. Select **Edit Goal** from the **Tab Action Menu** and select the goal of the **Service Plan**. Click **Save**.
7. Select the **Plan Content** to add Sub-Goals and Plan Items to be achieved.
   - Select **New Sub Goal**
   - **Select** the appropriate sub-goal
   - Select the **Owner** for the sub-goal and **Save**

ADD PLAN ITEMS TO SUB GOAL

8. From the **Plan Content** Screen, toggle the **Sub Goal** to view the existing **Plan Items**.
9. From **List Action Menu** for the Sub Goal, select **Add Plan Item.**
10. **Select** the appropriate **Plan Item** from the list.
11. Enter **expected start** and **end** dates and **expected outcome.**
12. **Responsibility** will default to **client** and **Owner** will default to the **user** (you) if left blank. Change only if needed.
13. Select **Save**.
14. If the plan item has an associated **Plan Item Category**, select **Edit** from the **List Action Menu** for that **Plan Item**.
15. Select the appropriate **Plan Item Category** from the drop down list, and **Save**.
16. Notes created on the **Notes** tab on the **View Plan Item Details** screen (e.g. steps or actions that the client is to take) will appear on the **Service Agreement**.

PLAN ITEMS REFERRALS

Plan items which *describe the program* the individual will be attending as well as follow up plan items (e.g. **Attend Basic Skills, 90 day follow up)** must link the provider and **session** in the Programs and Services Catalogue to the individual.

PLAN ITEMS REFERRALS (con't)

Information which is obtained from the Programs and Services Catalogue must be an **exact** match to referral information that you enter on the **Plan Item** in order for the provider referral to be successful. Provider referrals are used to count the months of training benefits for the individual and are displayed in the **Learning Stream Counter**.

SEARCH THE PROGRAMS AND SERVICES CATALOGUE

1. From the **Search Product Provider** screen, **Search** for the **Product Provider.**
2. **Select** appropriate Product Provider from **Search Results** by clicking on their **Reference** number.
3. Select the **Programs and Services Catalogue** tab. Three search options are available:
   - **Search** for a particular program using parameters identified in this screen.
   - View a listing of all **Active Programs and Services**. These are either in progress or scheduled to start in the future.
   - View all **Programs and Services.** (including past dates).
4. Select the desired program using the hyperlink and view the **Plan Item**, **Plan Item Category**, **Start** and **End Dates** of the **program** and of the **session**.

PROVIDER REFERRAL - PROGRAMS

5. From the **Service Plan Home** select **Plan Content** tab, toggle the appropriate **Sub Goal** to view the **Plan Items**.
6. If required, **Add Plan Item** as identified in the section above.
7. **Edit** the **Plan Item** so that:
   - The **Expected Start** date and **Expected End** date match the **session** start and end dates of the desired program in the Catalogue.
   - The **Plan Item Category** matches the Plan Item Category listed in the Program and Services catalogue.
8. On the **View Plan Item Details** screen select **Refer**. From the **Search Provider** enter the provider's name and an exact match of the **program** start and end dates, then select **Search**.
9. From the **Search Results** list select the program. (If Search list is not provided, something is not matching and you must return to step 1).
10. From the **Refer to Program/Course** screen scroll down and **Select** (do not use Save) the appropriate session the individual will be attending.
11. You will return to the View Referral Status screen where you will click on the **Referral Details** and check that the Current Client Status is now **Referred**. The Status will not change to **Committed, Waitlisted** or **Pending** until **Evidence** has been entered and applied.

Note: If there are insufficient months of eligibility for training left, a referral cannot be completed.

PROVIDER REFERRAL - SERVICES

1. On the **View Plan Item Details** screen, click on **Refer**. From the **Search Provider** – enter the provider's name and an exact match of the **program start date**, then click **Search**.
2. From the **Search Results** list **Select** the service.
3. From the **Refer to Service** screen, click on **Save**.

PLAN ITEMS REQUIRING APPROVAL

Some plan items require approval and will automatically display **Unapproved** status once selected. Users may require a higher level of internal approval for certain plan items e.g. Consdr Counsel to Leave (**I**) , Consdr Repeat course (**L**).

PLAN ITEMS REQUIRING APPROVAL (con't)

INTERNAL AND EXTERNALS

1. Enter the **Plan Item** that requires Approval.
2. From the **View Plan Item Details** page, click **Submit for Approval** in the **Tab Action Menu**. The status changes to **Submitted.**
3. If the user has the authority to approve, they approve as per Step 5. Otherwise, the user sends a **Task** to the appropriate user or Work Queue to approve the plan item. **Comments** should request approval of the plan item.
4. It is important to enter a **Note** on the **Service Plan Home** page explaining the reason for the request for Approval.

INTERNAL APPROVER

5. The appropriate internal authority will **reserve** the **Task**.
6. From the **View Plan Items Details** screen, select **Approve** from the **Tab Action Menu** (status will change to **Not started**).
7. Select **Edit** from the **Tab Action Menu** on the **Plan Item Details** page.
8. Enter **actual start/end dates, Outcome** (Attained or Not Attained) and **Save.** The status will change to **Completed.**
   Note: **Attained** means the service is approved, **Not Attained** means the service is denied.
9. On the **Notes** tab of the **Service Plan Home** screen enter **Notes** regarding details of the plan item approval.
10. Return to the **Task** function, and forward the **Task** back to the originator informing them that the Plan Item is complete.

Note: Do not **Reject** a plan item from either the **Approval Request** Screen or the **View Plan Item** details screen, as you will not be able to change the **Outcome** to **Not Attained** once the plan item has been rejected.

SERVICE PLAN APPROVAL

Once the client has accepted (agreed to) the **Service Plan** and all plan items that require approval are **approved**, select **Submit Service Plan** from the **Tab Action Menu** on the **Service Plan Home Page.** The **Service Plan** will change to **Approved** status.

Note: If the status does not change, click the **Refresh** button.

Once the Service Agreement has been **issued** and **accepted** by the individual the **Service Plan status** changes to **Active**. The **Accepted** date reflects and documents the agreement of the client to complete the activities outlined in the Service Plan. A **Service Plan** is not **active** until the **acceptance date** has been entered on the **Service Agreement** screen.

SERVICE AGREEMENT

When the **Service Plan** status is **Approved** a **Service Agreement** can be created and printed for the client.

CREATE AND PRINT A SERVICE AGREEMENT

1. From the **Service Plan Home** screen select the **Service Agreement** tab.
2. Click on **New** and **Select** the client. Click on **Next.**
3. From the **Create Service Agreement** screen, click on the magnifying glass to search and select an address.
4. The **Issue Date** defaults to the current date.
5. **Reason** defaults to **Initial** but another selection can be selected. Click on **Save**.
6. Click the **View Service Agreement,** and **Yes** to preview the **Service Agreement.**

CREATE AND PRINT A SERVICE AGREEMENT (con't)

7. The **Service Agreement** will open in an Adobe Reader window. Click on the **Open** button.
8. Use the Print command to print the **Service Agreement.**

ACCEPT A SERVICE AGREEMENT

9. Select **Edit** on the **List Action Menu**.
10. From the **Modify Service Agreement** screen, complete the **Date of Acceptance** and click **Save.** The status of the **Service Agreement** will change to **Accepted** and the **Service Plan** status will change to **Active**.

MANAGE A SERVICE PLAN

Service Plan management includes activities related to monitoring individual's progress in completing their Service Plan, documenting important events, issues and stages in the progress, and providing rational for changes to the plan. It also includes updating other areas of Mobius as directed by policy and procedure.

Activities included in service plan management can include but are not restricted to:

Plan Items – Actual start and end dates are entered in a timely manner when the individual starts and finishes activities.
Plan Item Referrals – Referral status should be kept current – cancel and withdraw as appropriate.
Plan Item Outcome – are entered when an Actual End date is entered. Cancelled status does not required Actual End dates.
Service Plan Notes – are entered when additional details related to plan activities need to be recorded. (e.g. change in plans, withdrawal from training, attendance concerns, Follow Up details).
Education and Employment – these screens are updated pre and post training, during a new Assessment, or when circumstances change.
Employment Insurance Status – this screen should be updated as required by policy and business process.

CLOSING A SERVICE PLAN – GUIDELINES

Service Plans may be closed when certain criteria are met.

- **Do not Close** a Service Plan where Learner Benefits have been issued to avoid "locking out" other functions.
- If no **Learner Benefits** have been issued, the plan can be closed when:
  - All services are completed and outcomes are recorded for **Plan Items** and **Sub Goals**.
  - If the Service Plan is dormant (no activity or updates for 12 months).

LEARNING STREAM COUNTER

The Learning Stream Counter is a view screen that displays the months of training benefits for an individual as part of the Service Plan. This screen should always be reviewed when developing a training plan with an individual.

- All Plan Item Referrals with a Referred, Pending, Waitlisted, Cleared, and Committed status will be counted.
- Withdrawn and Cancelled status will use the withdrawal date to determine the number of months.
- Part Time training, Apprenticeship, and Services will **not** be counted in the learning stream.
- A Cancelled referral will be removed from the count.
- Always ensure appropriate approvals and documentation are in place to support any Duration exception.