GENERATING THE INDIVIDUAL RESPONSIBILITY PLAN: DEMO SUGGESTIONS

Viewing a customer's Individual Responsibility Plan:

- **Data:** Select a customer that is currently on your caseload and click to view their Individual Responsibility Plan.

- **Things to Point Out:**

  - The plan is populated from data that has been entered in various areas of the application. Any of the items that are hyperlinks on the plan can be updated, and the change will automatically refresh the view on the generated Individual Responsibility Plan.

Editing portions of a customer's Individual Responsibility Plan:

- **Data:** Select a customer that is currently on your caseload and click to view their Individual Responsibility Plan. Select an item that you would like to edit (maybe a Goal or a Need or Barrier). Click the associated hyperlink and edit the information. When you click 'Save' to update your changes, you will be taken back to the Individual Responsibility Plan and will be able to view the updated plan.

- **Things to Point Out:**

  - Any of the items that are hyperlinks on the plan can be updated, and the change will automatically refresh the view on the generated Individual Responsibility Plan.

Previewing and printing a customer's Individual Responsibility Plan:

- **Data:** Select a customer that is currently on your caseload and click to view their Individual Responsibility Plan. Click 'View to Print' to display a printable version of the Individual Responsibility Plan.

- **Things to Point Out:**

  - Clicking 'Print' on the browser toolbar will send the plan to the printer.