

Anatomy of a Plan

PlanBuilder

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Session Overview

- What is PlanBuilder
- Plans vs. Templates
- Create a new Plan
- Add Custom sections
- Built-In Sections
- Drag and drop Fields
- Field options
- Save Lists
- Add Signature Section
- Assign a Program type to the Plan
- Online Help and new iKnow session!



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What is PlanBuilder?

- The AWARDS PlanBuilder module is used to design customized service/treatment plans that reflect plans used by AWARDS agencies
- Flexibility to create treatment plans exactly how you want them to look
- Each program type can have a different treatment plan
- Each program type can have a different treatment plan schedule



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Plans & Templates

- Templates are base models that Foothold Technology populates
- Browse the templates and choose the plan that suits your program(s)
- By clicking the “Create New Plan from Template” button that template will move to the Plans tab
- Plans can be edited in any way you need



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New iKnow Session!

Starting in July we will be debuting a new iKnow session based on this session!



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Q & A



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