

Initial Entry of Support Attendees

- CREATE PLAN
  - Enter Attendee names, identify as team member, add Titles, Relationship, identify formal supports
- NOTIFY ATTENDEES
  - Notify attendees prior to the meeting
  - Enter method and date of notification
- HOLD CFT MEETING
  - Sign the Sign-In sheet
- UPLOAD DOCS
  - Scan and upload CFT Sign-In sheet

- COMPLETE PLAN
  - **Check CFT date in Demographics accordion of the plan against Sign-In**
  - **Update attendees' information based on Sign-In sheet**
    - **Note who attended or not**
    - **Make name corrections before submitting first plan**

Copied Plan after First Entry of Support Attendees

- COPY PLAN
  - Review former attendee names, team member checks, Titles, Relationship, formal supports checks (copied with the new plan)
  - **Update any support/attendee's information that has changed**
- NOTIFY ATTENDEES
  - Notify attendees prior to the CFT meeting
  - **Update method and date of notification**
- HOLD CFT MEETING
  - Sign the Sign-In sheet
- UPLOAD DOCS
  - Scan and upload CFT Sign-In sheet

- COMPLETE PLAN
  - **Check CFT date in Demographics accordion of the plan against Sign-In**
  - **Update attendees' information based on Sign-In sheet**
    - **Note who attended or not**
    - **Make name corrections before submitting next plan**