

Using the Case Planning Tool



David Tweedie, System Administrator
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Case Planning Function

- Are you engaged with Case Management?
- Adding a Case Manager
- Case Planning Tool
- Contact Information and HMIS Web Address

1. Are you engaged with Case Management?

Are you engaged with case management?


Yes




G

This question must be answered for all clients

2. Adding a Case Manager





Client - (246637) Mouse, Mickey The 

 (246637) Mouse, Mickey The
Release of Information: **None**

Client Information Service Transactions

Summary Client Profile Households ROI Entry / Exit **Case Managers** Case Plans SSOM Assessments


Case Managers


| | Name | Provider | Phone Number | Start Date | End Date |
|---|--|--|--------------|------------|------------|
|  | Jose Lucio | The Community Partnership for the Prevention of Homelessness | 202.543.5298 | 04/06/2012 | |
|  | TCP Housing Specialist | The Community Partnership for the Prevention of Homelessness | 555.555.5555 | 03/01/2012 | |
|  | Core Service Agency- Mental Health Treatment | The Community Partnership for the Prevention of Homelessness | 555.555.555 | 02/06/2011 | |
|  | Tom Fredericksen | The Community Partnership for the Prevention of Homelessness | 202.543.5298 | 02/06/2011 | 04/06/2012 |

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The Case Manager's name must be added to every Head of Household's profile page.

3. Case Planning Tool







Client - (246637) Mouse, Mickey The 

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Release of Information: None

Client Information Service Transactions

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Goals

| Classification | Type | Date Added | Date Set | Notes | Latest Note Date |
|---|---|------------|------------|---|------------------|
|   Housing | Move to Permanent Housing | 04/06/2012 | 04/06/2012 | (1)  | 04/06/2012 |
|   Case Management | Client will Participate in Case Management Services | 04/06/2012 | 02/15/2011 | (4)  | 03/07/2011 |

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Goals about housing, increasing income, employment, education, and self sufficiency must be added to all Heads of Households profiles and the profiles of other household members as appropriate.

Goal Classifications and Types

Every goal you set with a client must have a classification and type.

- A **Goal Classification** is the broad category a goal falls under.
- **Goal Types** are the specific issue the goal is attempting to address.

It is important to note that the list of Goal Classifications and Goal Types in the HMIS **IS NOT** an exhaustive list. New classifications and types can be added at anytime upon request.

Action Steps

Action Steps are goals within goals. They allow you to track and report on all the things that a client may need to do in order to achieve the overall goals they are working on.

PLEASE NOTE: Actions Steps should **ONLY** reflect the work the client is doing to achieve their goals. Anything the case manager is doing should be documented in the case notes.

Case Notes

Case notes should reflect any work the case manager is doing to help a client achieve their goals as well as to document any barriers to success.

- For reporting purposes, there should be a **MINIMUM** of one case note per goal per month.
- PLEASE NOTE: Once a case note has been saved is **CANNOT** be deleted or edited.

Overall Status

Overall Status is indicated when a goal or action step is set. The Overall Status should be set to “In Progress” at that time.

When a goal or action step is completed the Overall Status should be set to “Closed.”

- Once the goal is closed you must also indicate the Outcome:
 - Achieved
 - Not Achieved
 - Abandoned

Follow Up Information

This is where you can indicate who is following up on a goal and the date the goal will be followed up on.



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NO "WWW"