Case Management Screening Tool

**Definition of Case Management** – Case Management is a service provided on an ongoing basis that includes individual assessment, service plan development, arranging for necessary services, follow-up, and ongoing monitoring of client’s status and the services delivered.

**GUIDANCE:**

The Texas Department of Housing and Community Affairs (the Department) expects that CSBG eligible entities make it a priority to provide case management services to persons that are seeking to improve themselves and their life situation and to achieve self-sufficiency in key domains. Since the provision of case management is time intensive and caseworkers carry-out a myriad of responsibilities, caseworkers will need to set a realistic goal of how many persons can be properly served in the case management program.

After the client has completed the Case Management Client Questionnaire and the caseworker has completed the Self-Sufficiency Outcomes Matrix with the client, there are a few key factors to consider in determining if a client is a good candidate for enrollment in a case management program. The caseworker should focus their efforts on identifying persons that are willing to take action to improve their circumstances.

Some of the key factors to consider may include, but are not limited to: recent unemployment, recent changes in family composition which affect income, the size of the household (larger households may face more barriers that make it more difficult to meet service plan goals), enrollment in an education program, and enrollment in a job skills training program. Persons experiencing these life circumstances may be good candidates for case management. A good pool of potential case management clients could be gleaned from persons that are enrolled in community college or trade school, GED or ESL course, parents of Head Start students, or other education or job skills programs.

The amount of case management to be provided to an individual will vary depending on the client and their family’s needs. However, at a minimum, case management should include a once a month in person meeting. At the meeting, the caseworker will review the Service Plan and document what steps have been completed and determine if target dates for completions were met and the client’s progress at achieving goals. In between the monthly meetings, follow-up with the client should be conducted weekly or bi-weekly via phone calls or e-mails to check on the client’s progress at accomplishing the tasks in their Service Plan and to determine if they need assistance or information on resources. Follow-up, whether in person, by e-mail or phone calls, is to be documented in client file case notes. Follow-up is also a key tool to determine what resources the client may need to be directed to or what assistance may be necessary in order for them to achieve their goal and complete actions steps in the Service Plan.