

## Service Plan (Case Management Level 3-4)

**Client Name:** \_\_\_\_\_

**Month:** \_\_\_\_\_

**Year:** \_\_\_\_\_

<b>Client Goals</b>	<b>Client Task(s)</b>	<b>Referrals Given</b>	<b>Progress Notes</b>
<b>Permanent Housing</b>	<ul style="list-style-type: none"> <li>Client will apply for Affordable Housing Units. Goal is 1 new unit each month until client is on a minimum of 6 waiting lists.</li> </ul>	Housing Authority Private Apartments Section 8 VASH Voucher	<input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress. _____ _____
<b>Financial Plan</b>	<ul style="list-style-type: none"> <li>Client will maintain a monthly budget.</li> <li>Client will maintain/increase their income by: _____</li> <li>Client will decrease expenses by: _____</li> <li>Client will begin to save towards exiting to other housing.</li> </ul>	Monthly Budget Tool, Food Banks, Club cards, _____ _____	<input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance. _____ _____
<b>Educational</b>	<ul style="list-style-type: none"> <li>Client will enroll in necessary classes to work towards educational goal.</li> <li>Client will work with Case Manager to complete a Good Tenant Class.</li> <li>Complete Moving On Class with Case Manager</li> </ul>	Local colleges, Adult Schools, Good Tenant and Moving On Classes w/ Case Manager	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress. _____ _____
<b>Employment</b>	<ul style="list-style-type: none"> <li>Client will work towards securing employment by updating resume, submitting applications, etc.</li> </ul>	Workforce Development, Various websites _____ _____	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress. _____ _____
<b>Legal</b>	<ul style="list-style-type: none"> <li>Client will address any pending legal obligations.</li> <li>Client will follow-up as needed with any law enforcement officer/agency.</li> </ul>	Local Court, Probation/Parole Officer, IROC, _____ _____	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance. _____ _____

	<ul style="list-style-type: none"> <li>Client will enroll in and complete any required classes.</li> </ul>		
<b>Physical Health</b>	<ul style="list-style-type: none"> <li>Client will follow-up and attend any medical appointments and referrals.</li> <li>Client will remain medication compliant.</li> </ul>	Primary Care Physician, Specialist, Pharmacy,	<input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
<b>Mental Health</b>	<ul style="list-style-type: none"> <li>Client will follow-up and attend any mental health appointments and referrals.</li> <li>Client will remain medication compliant.</li> </ul>	Psychiatrist, Psychologist, Riv. Co. mental Health, Counselor, Therapist	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
<b>Substance Abuse</b>	<ul style="list-style-type: none"> <li>Client will maintain sobriety by attending AA/NA meetings, support groups, sponsor, etc.</li> <li>Client will discuss any issues or concerns with Case Manager.</li> <li>Client will not use any illegal substance on or near unit.</li> </ul>	AA/NA meetings, Support Groups, IROC,	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
<b>Housing</b>	<ul style="list-style-type: none"> <li>Client will maintain a clean and organized unit.</li> <li>Client will report any concerns and permit staff to complete repairs/inspections as needed.</li> <li>Client will abide by their rental agreement.</li> </ul>	Monthly Rental Agreement	<input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
<b>Case Management</b>	<ul style="list-style-type: none"> <li>Client will regularly attend case management meetings.</li> <li>Client will contact Case Manager if they cannot keep their appt.</li> </ul>	Case Manager	<input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
<b>Other</b>	<ul style="list-style-type: none"> <li>Client will work towards this personal goal: _____</li> </ul>		<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.