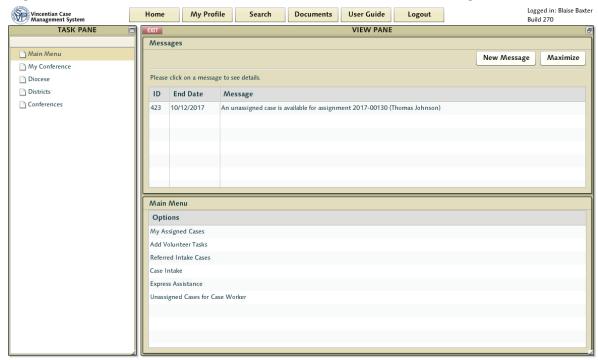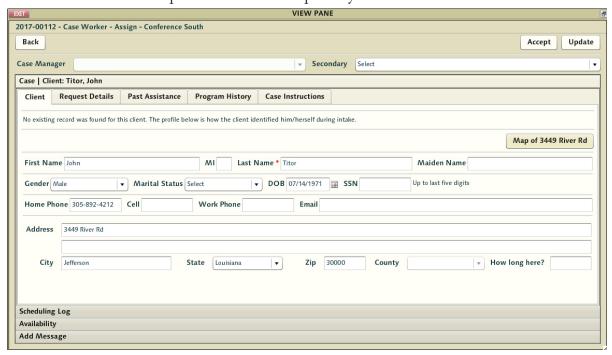# Introduction

Casework is the process of individually assessing the needs of the individual requesting assistance. It is the process of judging the need and the level of resources necessary to help an individual - not judging the individual themselves. CMS gives caseworkers the ability to collect and share the details of the particular situation in a way that improves the decision making process and helps give caseworkers confidence in the decisions they're making.

As described in the routing section, cases are assigned to caseworkers either by the caseworkers themselves or through the decisions of others granted the authority to assign. Any work that has been assigned to a caseworker can be found by selecting 'My Assigned Cases' in the main menu. Casework that is awaiting self-assignment can be found by selecting 'Unassigned Cases for Caseworker' in the main menu.

Caseworkers may explore the unassigned cases to determine if the case is something they are willing to work. Selecting 'Unassigned Cases for Case Worker' brings up a list of all available cases that have cleared intake and are in the unassigned state for the conference in question. The client profile data and assistance request information captured at intake can be reviewed at this point. The only constraint upon caseworkers assigning cases is that cases can only be assigned to caseworkers in the conference to which the case has been assigned.

After selecting a case from the unassigned worklist caseworkers have the ability to take the case by pressing the [Accept] button. They can also assign an additional caseworker to work on the case - as often caseworker pairs are assigned home visits together. These secondary caseworkers can also complete work when the primary is unavailable to continue.

Note: Adding a caseworker to the case allows for situations like training. Additional assigned workers will have the case added to their 'My Assigned Cases' list - and will be able to review the case as it progresses. If casemanagers are assigned, they do not perform casework or generally edit cases - so assigning one would simply be for additional oversight.

Cases may not be accepted straight away - they might be reviewed by the caseworker to consider whether this is a case that is one they wish to take on. Examining past assistance history and the details of the neighbor will help them to make that determination.

Scheduling Log
One aspect of this process is the effort to contact the individual seeking assistance to set up a time for a home visit. This effort is not always successful - and might well happen prior to accepting the case for oneself. To help track any efforts that have been made to contact this person - the Scheduling Log is available here as an accordion.

Once cases have been added to a caseworker's queue, the caseworker can return to their home page and select 'my assigned cases' from the main menu. Once selected, 'my assigned cases' presents a list of all cases this caseworker is currently assigned and are currently active. Clicking on any of the cases in this list will bring up the case at the stage representing it's current status. For example, a case that was at the 'visit' stage would wait for the return of the caseworker allowing them to quickly return to the business of entering data collected from the visitation. Cases could well be dormant pending some event for a period of time and would patiently wait for resumption in the caseworker's 'my assigned cases' queue.

Reminder: A case is envisioned as having a 'life cycle' - they shouldn't simply be used as open containers related to a client to be filled by new assistance requests. That does not mean that a caseworker might not go on a visit, discover a need for additional assistance that was not part of the request that spawned the case in the first place, and add the additional effort - nor that some cases might be left open longer than others at the caseworker's discretion - but they should be viewed as reasonably discrete. Casework and home visits are a huge part of what makes St Vincent de Paul work - and those drawn to the organization truly feel the value of that mission. But cases cannot go on forever - and the nature of the system allows for long term relationships over multiple casework events. Getting a feel for when a case deserves closure is something every caseworker will have to come to on their own.

It is also important to note that as the caseworker works through the process the tabs will become 'active' - allowing them to hop backwards and correct or alter something in a previous step. This can be problematic if, for example, the caseworker wanted to change the client - so whereas many things can be amended, there are some that require starting again from that point. In these rare instances, pressing the [Restart} button from a previous tab will reset the workflow process to that tab - allowing the caseworker to then move forward again from that point.