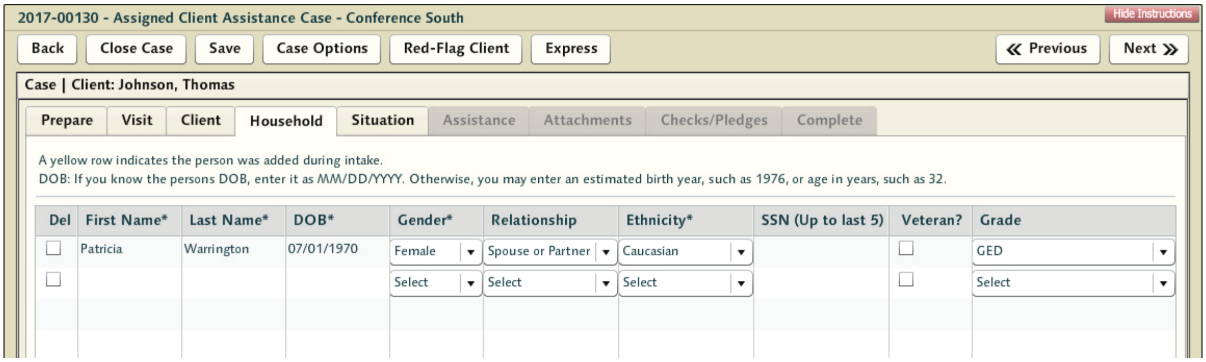
Household Tab

Collecting household information is identical to the intake process - except that in this case, if the client profile has been pointed to an existing client record, it is dealing with established data. Information collected by intake is shaded yellow to make it easier to note elements that have been changed.



Household members are added one by one, with each represented by a single line. Obviously many of these elements may not be available during a home visit - but if caseworkers are able to capture them it's good. Knowing individuals in the household are 'non-related' or veterans are valuable in understanding the situation at hand.

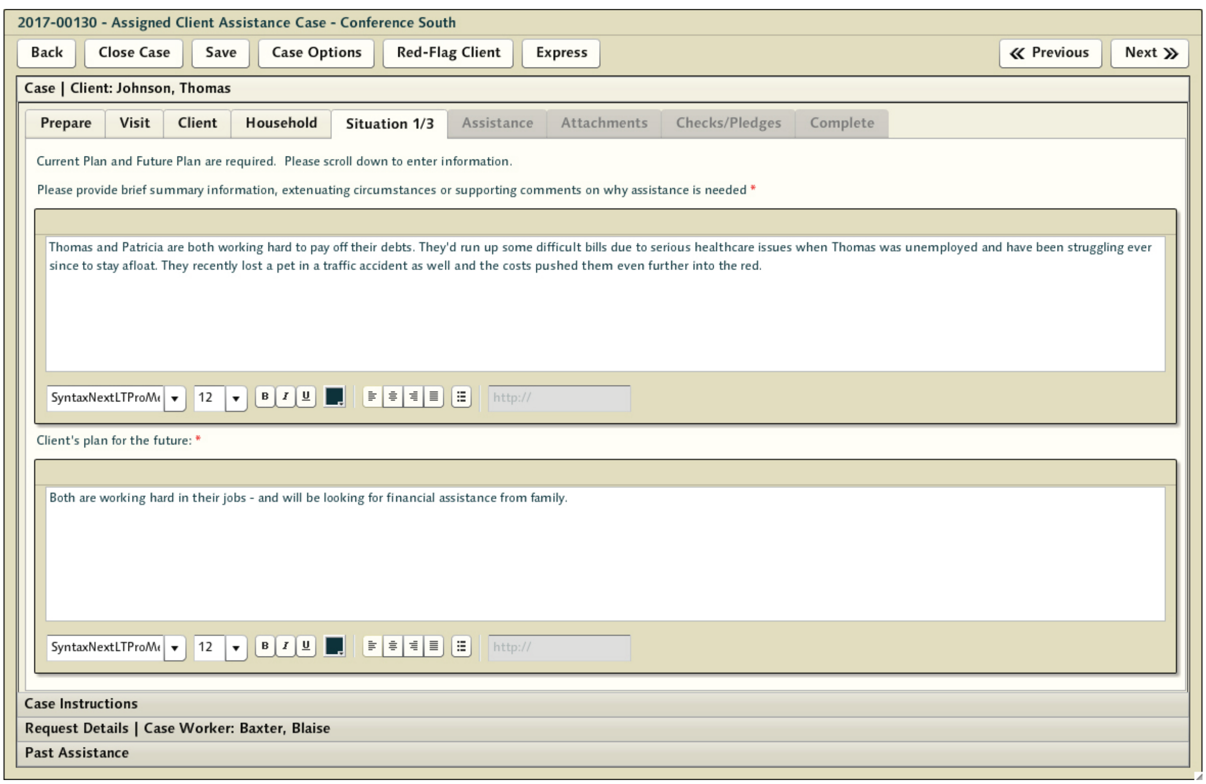
To add a household member there are 5 required fields - denoted with a star. They are First Name, Last Name, DoB (or age), Gender, and Ethnicity. To mark a household member as a spouse/partner simply select that option in the Relationship column when entering the data. Elements such as Grade capture the highest educational achievement of the individual and again help build a picture of the household in question. The more data like this that's accurately collected, the more valuable demographic breakdowns of those you serve can present pictures to grant partners or leaders within your community.

Caseworkers should only add either date of birth or age (as age is calculated if date of birth is provided). We strongly suggest using real birthdays instead of ages as it presents a more accurate picture of the individual. Using the Checkbox in the column labeled 'Del' will delete the family member's household relationship when either using the [Save] button at the top or using the [Previous] or [Next] primary navigation which commits the changes.

Situation Tab

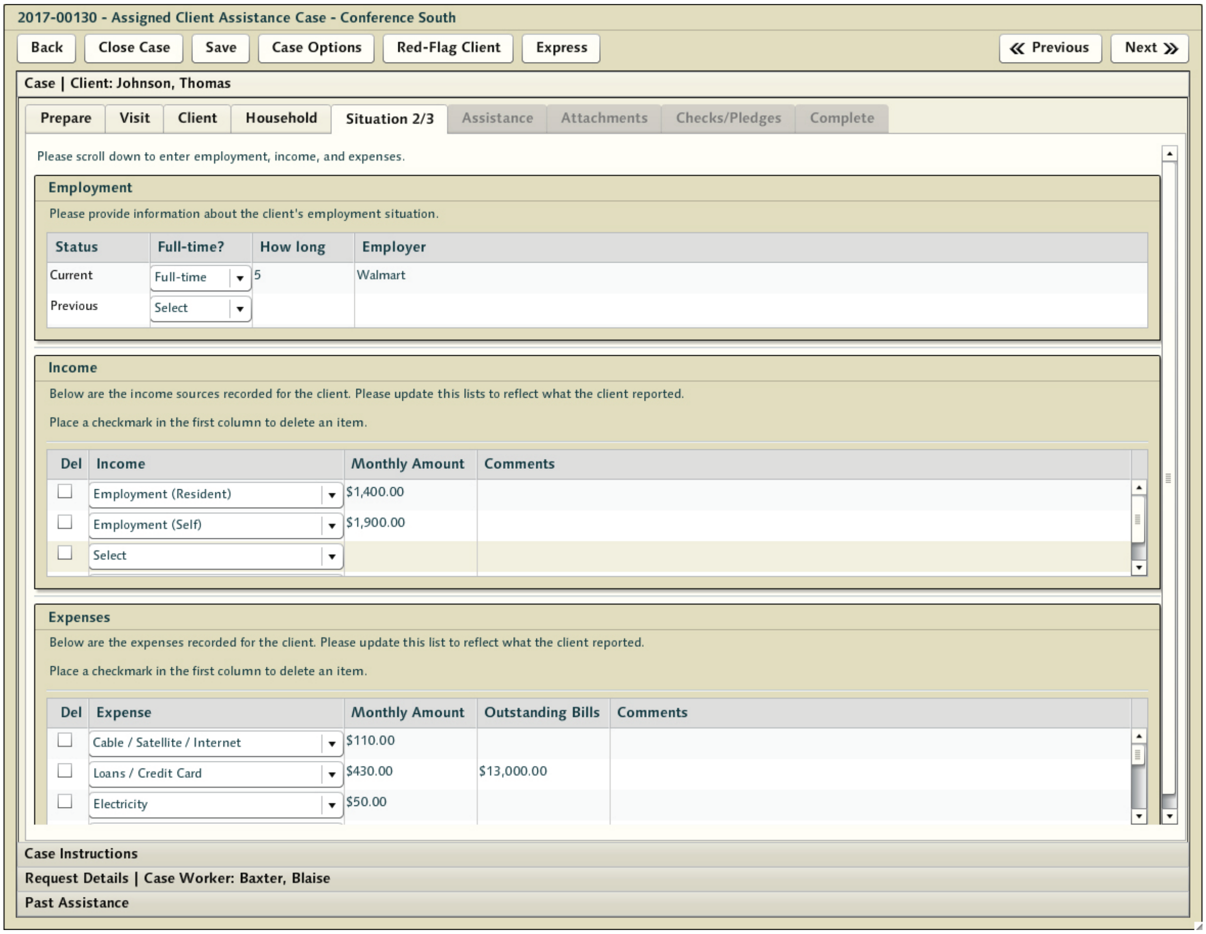
The situation tab is the process whereby the caseworker supplies the data captured during the home visit that describe the situation of the client. There is a great deal of information that the caseworker has collected - whether in notes on the case record form or simply in the conversations with the client during the home visit - that are important to transcribe into the ongoing client record. By capturing the details of the petitioner's bills and going through the finances it creates a much better overall picture of the situational necessities - and helps the caseworker (and any Vincentians involved in the future) to assess what sorts of additional efforts might apply in helping with this individual's situation above and beyond the unique request at hand - whether that's with vocational or renters rehabilitation efforts or through other non-affiliated charitable solutions. These critical observational details go a long way to helping everyone make a difference in people's lives.

The process of collecting this information is broken into 3 parts.
The first stage of the situation tab consists of two text boxes. These allow the caseworker to detail the general experience of the meeting; the pretext for why they called looking for help, and the general state of things within the household. Caseworkers have been doing this for many years - and CMS is absolutely not trying to turn your effort into something closer to 'social work' and less 'spiritual' in nature. Many caseworkers simply record their thoughts here, or use smartphones to record dictation during the drive home and paste those contents into these fields



The primary goal of the 2 boxes, more specifically, is to collect information related to the nature of the situation itself - and what sorts of things the individual plans to do to improve things. The text boxes come with rich text formatting tools - allowing the caseworker to organize and emphasize their thoughts for anyone reviewing the case notes in the future.

The second stage collects much of the financial details of the household - everything from employment history to income and expenses. Income elements should be added line by line, allowing for multiple income sources for multiple adults living at the household.

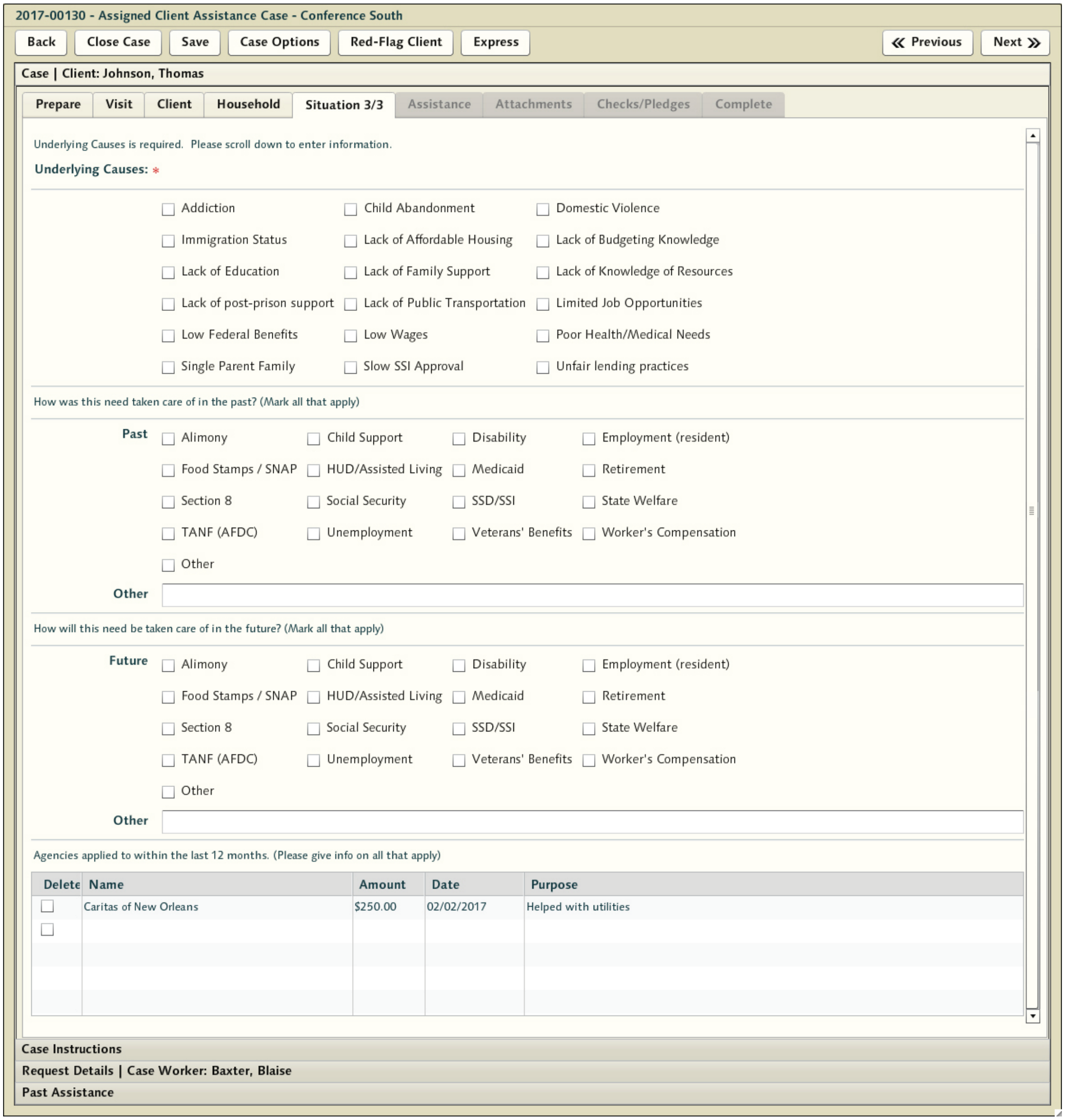


This information is helpful when making determinations on whether assistance is justified in this, or in future, situations. Data collected here is part of the client record - and will appear in future cases on the printed case record form for other caseworkers to have at their disposal when going on home visits.

Experienced caseworkers can take a look at a worksheet like this and know straight away if the household should be looking for alternative housing, to take on roommates, or to find ways to cut out excessive costs. Often the process unearths expensive furniture rental scenarios or predatory payday loan practices that take advantage of those less fortunate.

You'll also want to capture income sources that aren't necessarily traditional income - such as SSI/SSD or other disability payments - and take notes if they're tied to household members. There are some financial resources out there - like EFSP or state and local energy assistance - that will only serve those who fall into particular categories.

Finally Situation 3/3 collects some assessments of contributing factors and what sort of efforts the client is looking to put forth to improve their situation. These elements aren't just useful for a client snapshot, they can also be used demographically to show how many poor fall off the unemployment roles or how many veterans are being served.


2017-00130 - Assigned Client Assistance Case - Conference South

Back | Close Case | Save | Case Options | Red-Flag Client | Express | « Previous | Next »

Case | Client: Johnson, Thomas

Prepare | Visit | Client | Household | Situation 3/3 | Assistance | Attachments | Checks/Pledges | Complete

Underlying Causes is required. Please scroll down to enter information.

Underlying Causes: *

- [ ] Addiction
- [ ] Child Abandonment
- [ ] Domestic Violence
- [ ] Immigration Status
- [ ] Lack of Affordable Housing
- [ ] Lack of Budgeting Knowledge
- [ ] Lack of Education
- [ ] Lack of Family Support
- [ ] Lack of Knowledge of Resources
- [ ] Lack of post-prison support
- [ ] Lack of Public Transportation
- [ ] Limited Job Opportunities
- [ ] Low Federal Benefits
- [ ] Low Wages
- [ ] Poor Health/Medical Needs
- [ ] Single Parent Family
- [ ] Slow SSI Approval
- [ ] Unfair lending practices

How was this need taken care of in the past? (Mark all that apply)

Past

- [ ] Alimony
- [ ] Child Support
- [ ] Disability
- [ ] Employment (resident)
- [ ] Food Stamps / SNAP
- [ ] HUD/Assisted Living
- [ ] Medicaid
- [ ] Retirement
- [ ] Section 8
- [ ] Social Security
- [ ] SSD/SSI
- [ ] State Welfare
- [ ] TANF (AFDC)
- [ ] Unemployment
- [ ] Veterans' Benefits
- [ ] Worker's Compensation
- [ ] Other

Other

How will this need be taken care of in the future? (Mark all that apply)

Future

- [ ] Alimony
- [ ] Child Support
- [ ] Disability
- [ ] Employment (resident)
- [ ] Food Stamps / SNAP
- [ ] HUD/Assisted Living
- [ ] Medicaid
- [ ] Retirement
- [ ] Section 8
- [ ] Social Security
- [ ] SSD/SSI
- [ ] State Welfare
- [ ] TANF (AFDC)
- [ ] Unemployment
- [ ] Veterans' Benefits
- [ ] Worker's Compensation
- [ ] Other

Other

Agencies applied to within the last 12 months. (Please give info on all that apply)

Delete	Name	Amount	Date	Purpose
☐	Caritas of New Orleans	$250.00	02/02/2017	Helped with utilities
☐				

Case Instructions

Request Details | Case Worker: Baxter, Blaise

Past Assistance

Many of these are taken directly from the financial worksheet, but they can also be implied from income sources of the varying types. The last section is the outside agency block where existing assistance rendered to the family from other local groups can be tracked as well.