

Service Plan (Case Management Level 1-2)

Client Name: _____

Month: _____

Year: _____

Client Goals	Client Task(s)	Referrals Given	Progress Notes
Documents	<ul style="list-style-type: none"> Client will obtain current ID, DL, SS Card, Birth Cert, Proof of income, etc. 	DMV, SS Administration, County Recorder	<input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress.
Veteran's Benefits	<ul style="list-style-type: none"> Client will obtain a copy of their DD214 Client will apply for benefits 	Veteran's Administration	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress.
Financial Plan	<ul style="list-style-type: none"> Client will establish and maintain a monthly budget. Client will maintain/increase their income by: _____ Client will decrease expenses by: _____ 	Monthly Budget Tool, Food Banks, Club cards, _____ _____ _____	<input type="checkbox"/> Client is in compliance. <input type="checkbox"/> Client is not in compliance.
Educational	<ul style="list-style-type: none"> Client will enroll in necessary classes to work towards educational goal. 	Local colleges, Adult Schools, _____	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress.
Employment	<ul style="list-style-type: none"> Client will work towards securing employment by updating resume, submitting applications, etc. 	Workforce Development, Various websites	<input type="checkbox"/> Not Applicable. <input type="checkbox"/> Goal Completed. <input type="checkbox"/> Goal in progress.
Legal	<ul style="list-style-type: none"> Client will address any pending legal obligations. Client will follow-up as needed with any law enforcement officer/agency. Client will enroll in and complete any required classes. 	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.

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