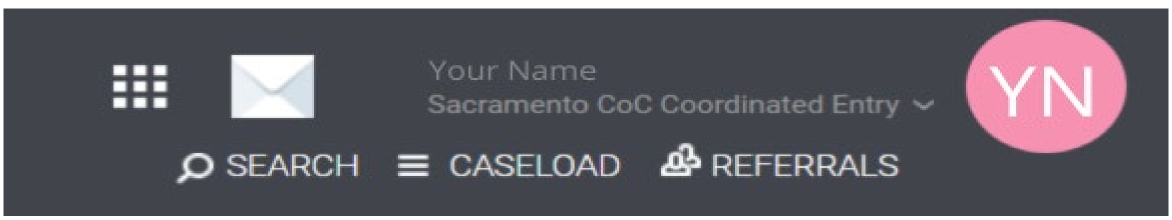
Case Conference Tool

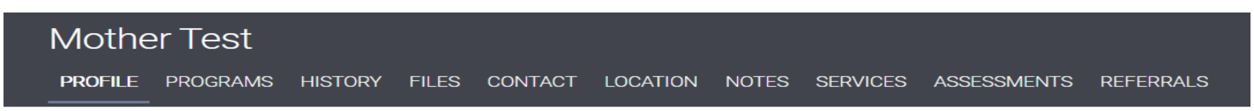
The Case Conference Tool helps our CoC to coordinate, collaborate and create goals to assist client housing needs more effectively and quickly.

How To Find the Case Conference Tool

1. Go to the top right-hand corner of your HMIS account and change the agency profile to Sacramento CoC Coordinated Entry. (If you do not see this option, email hmis@sacstepsforward.org to gain access.



2. Once in the Sacramento CoC Coordinated Entry account, search for the client. Go to their profile.
3. Go to the Assessments tab on the client's profile.



4. Look at the Assessment History to see if a Case Conferencing Tool has already been created.

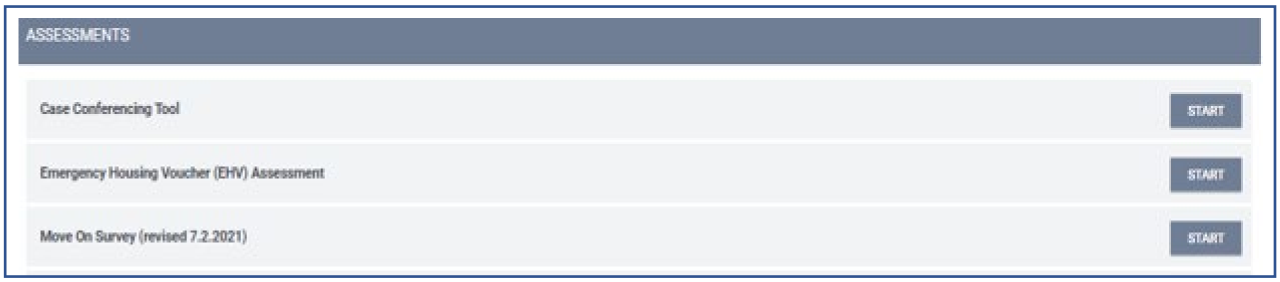
How to Edit the Case Conference Tool

1. Using your mouse, hover over the left side of the Case Conferencing Tool. A Box with a Pencil should appear.

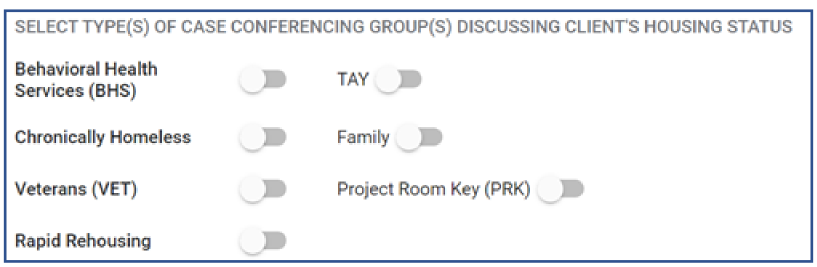
2. Click on the Box with the pencil to begin editing the tool.

Creating a New Case Conference Tool:

If a client does not have a Case Conference Tool already, you can create a new one by clicking 'Start'. Make sure you fill out all the sections accordingly.



When you need to add a client to the case conferencing discussion, you would start by toggling the appropriate group(s) on. Please make sure that you are only choosing the group(s) you will be attending. For example, for Family Case Conferencing only toggle on 'Family'.



Case Conferencing Updating Notes:

Please be sure to note any important housing information and accommodation.

Client History/Housing Barriers	low credit, owe rent, past evictions, pets, etc. ADA unit required

PROGRESS UPDATES: PRESS ENTER SO MOST RECENT COMMENT APPEARS FIRST. INCLUDE THE DATE AND YOUR NAME BEFORE ENTERING THE UPDATE INFORMATION.

Progress Note **The most recent progress note goes on top!**	04/12/22: Case manager- Client is PSH document ready. 04/05/22: Case Manager- Client is currently in a shelter. Client is interested in Adult PSH.

Case Conferencing Steps:

There are four steps to help us keep track of a client's housing progress.

Step 1: Client Engagement Goal:

a. A staff member has met this client and is collaborating with them on their housing.

b. Toggle 'Engagement Confirm'

c. Enter the 'Engagement Confirmed Date'

STEP 1: CLIENT ENGAGEMENT GOAL

Engagement Confirmed		Engagement Confirmed Date	05/03/2023

Step 2: Document Ready:

a. Determine what program type they qualify for (Permanent Supportive Housing, Rapid Rehousing, etc.). There are certain documents needed for the client to become document ready.

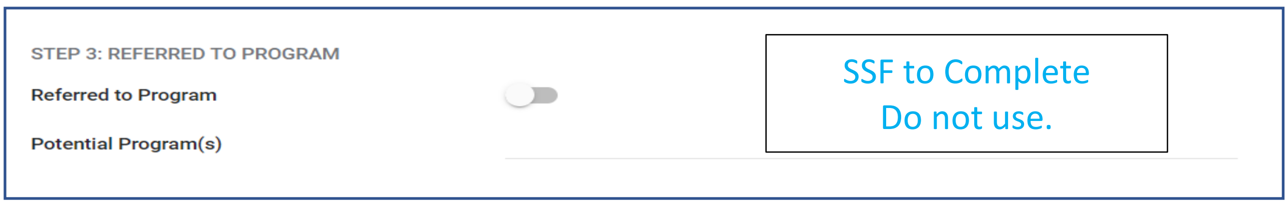
b. Check to make sure that pre-existing documents are up to date and not expired.
   i. Refer to the common forms used for housing programs and applications to achieve the client's Document ready status.

c. As you upload those documents, be sure to indicate which documents have been completed.

d. Once they are document ready (they have all needed documents processed) Toggle 'Document Ready'

<u>Step 3: Refer to a Program:</u>

a. Sacramento Steps Forward staff completes this step.



Step 4: Moved into Housing:

a. Once your client has moved into housing you must toggle the 'Moved into Housing

b. Enter the 'Moved into Housing Date'