Key Components of Case Management

Intake is the initial meeting between a case manager and a new client. The case manager uses this time to gather demographic information about the client, identify any immediate needs, and begin to establish trust and build a relationship. This first interaction is helpful for a case manager to determine if a client would benefit from the services your organization offers. If they would, they then move on to assessing the client's individual needs and strengths. If their needs fall outside your organization, the case manager works to identify and refer the client to an outside community resource.

The **Strengths and Needs Assessment** stage builds on the information collected during the Intake stage, going into greater depth on the client's individual strengths, challenges and goals. During this stage, a case manager's primary objective is to identify a client's strengths, problems, interests, and risks to success. While every client goes through this stage when they first come to an organization, it is important to reassess over time as needs and circumstances often change.

The **Service Planning** stage is particularly important to the success or failure of a client. A case manager establishes specific goals and the actions that will be taken to meet those goals. The result of this goal-setting process is a case plan inclusive of outputs and outcomes that will measure a client's success. A service plan should be both achievable and measurable.

Monitoring and Evaluation is critical to understanding the impact specific programs and services have on a client. Using the output and outcome metrics defined in the previous stages, a case manager should continuously monitor and evaluate a client's progress. Evaluation and data ensure client success is quantified and qualified rather than simply anecdotal.