

Case Management Case Closure Form

Follow-up plans are developed to reinforce and maintain participant successes. They are created with input from the participants and will set out participant goals and objectives going forward. At a minimum, they will include a list of referrals that may be needed in the future. Follow-up plans help participants transition to situations in which they can function well in the absence of case management services. Follow-up plans must be in place before participants exit the program.

Client Name: _____

HMIS ID: _____

Entry Date: _____

Planned Exit Date: _____

Program: ☐ CoC RRH ☐ CoC PSH

Summarize services rendered to the client/family and reasons why case is being closed. Comment on the progress made toward goals in the Secure Housing Plan.

Reasons for Closure

What services were provided and what progress was made:

Is the client aware of case closure?	YES	NO
Has the client been provided the Resource Referral Form upon exit?	YES	NO
Does the participant have adequate supports to sustain housing?	YES	NO

Follow-Up Plan at 30 days:

Case Manager Signature: _____ DATE: _____

Supervisor Signature: _____ DATE: _____

Date 30-day follow up is due: _____ Notes from follow-up:

Date 90-day follow-up is due: _____ Notes from follow-up:
