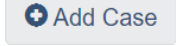## HT20: HOW TO OPEN AND CLOSE A CASE FILE

> The case file is used to record session activities and length of time spent working with the client, and to store case comments and case documents.
>
> An agency should only have one case file open at a time, and that case file should be attached to the primary case worker assigned to support the client.

1. Search for the client and click on their name to enter their file. If serving a family, navigate to the Family Head's file.

2. Click on the Client Management drop-down menu and select Case Management.

   Client Management ▾
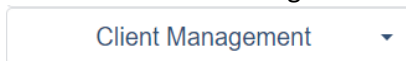
3. Click on the Add Case button: ⊕ Add Case

4. In the Family Members field, add any Family Members who are receiving services with the Family Head as part of a family.

5. In the Case Worker field, select the primary case worker assigned to the client. In general, if you are opening the case file, this should be you.

6. In the Goal field, select General.

7. In the Status field, select Open.

8. In the Start Date field, enter the date the Case Management file was started.

> If the client was referred to your agency from the BNL List, the Start Date of the Case File should match the Search Start Date recorded for the corresponding Housing Placement record.

9. In the Target Date field, select your target date for closing the file (optional).

10. In the Program field, select applicable values if any are listed. A value may be automatically assigned (for example, RH will be assigned if your service is Reaching Home funded).

11. Click the Save button: 💾 Save

12. To close a case file when the client is no longer on your caseload, navigate to the record, click the Edit button, and change the Status from Open to Closed – Success or Closed – Goal(s) not met. Click the Save button.