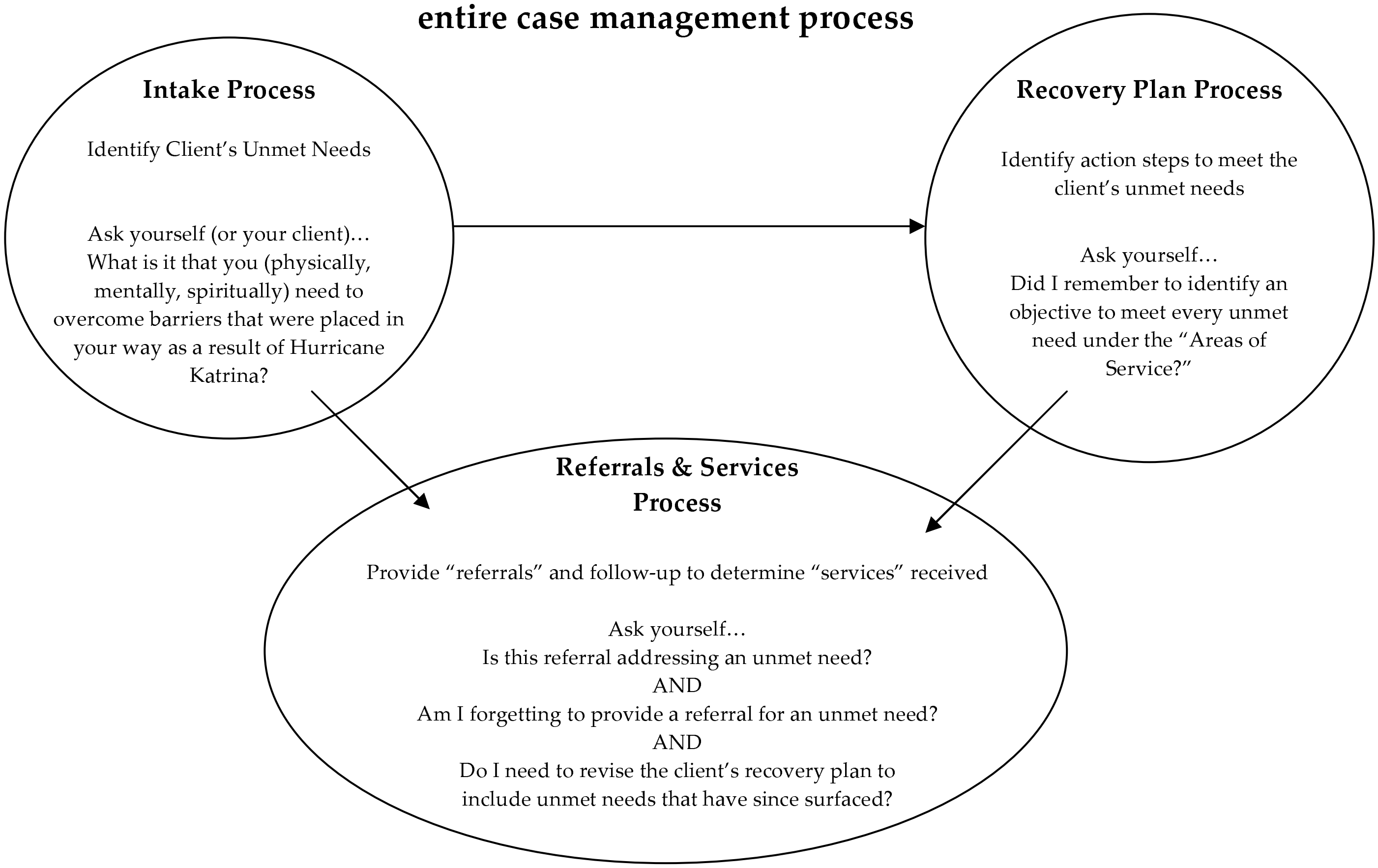
Katrina Aid Today
A National Case Management Consortium

# Tracking Services provided to KAT Clients

**Purpose:** Tracking services is not only about keeping track of where you've sent your clients for the purpose of reporting to funders/donors. There is a much bigger system of service delivery that is being considered in seeking that services are appropriately documented. Tracking services properly will assist case managers in helping clients develop and meet their recovery plan goals. This document gives context to services in the case management process and guidance on tracking services and referrals on KAT forms and in CAN.

## How services are integrated through the entire case management process




When you meet with a client, identify what it is that they will need to overcome barriers. The recovery plan is a tool that helps case managers and their clients organize these thoughts and to set target dates and action steps to overcome barriers in order to reach their goals. Case managers should regularly refer back to the Recovery Plan, as many of you do, to determine what objectives have been met, and to establish new goals if/when necessary. Case closure should be determined based on recovery plan goals.

Katrina Aid Today

A National Case Management Consortium

# Tracking Services provided to KAT Clients

**Keeping track of services provided:** Services provided as part of case management are tracked on both KAT forms and in CAN.

- Use the "Services Tracking" page (p. 8) of the Initial Assessment to record referrals and services provided to your client.
- Input the referrals and services provided into CAN by searching the Resource Database.
    - If a search of the Database does not produce the referral or service or the entry of this service provided is incomplete (i.e. does not include a value, etc.), it means that this service or program has not been registered with CAN. Contact your supervisor to ensure that these services, provided by your own agency or another one, are entered into the database so that they can be properly tracked.
    - Note: If you manually enter the data into the "Referral" and "Services" fields on the individual clients' record, the information will not be available the next time you need it, nor will it count towards the activities that are reported to KAT.
    - If you haven't done so already, and you are responsible for entering cases into CAN, take the "Resource Database" training regularly offered as a free online course by CAN staff. To view the calendar of classes, go to https://katrina.communityos.org/core/dates.taf

**What if I refer my client to a "sensitive" service and I don't want to put it in CAN?**
The short answer is: You have to. The longer answer is: There are ways to "disguise" referrals and services in an effort to protect their confidentiality, while ensuring you get credit for services provided. Please see example below.

Use the Agency, Program, Service Profiles Manual available on the CAN website to enter new services into the CAN database.

If there are services you provide to your client (either directly or indirectly) that you want to keep anonymous, create a service profile under your agency's name. Use a "Service Area" description found on the Assessment Form's "Needs Assessment" section, as the service name.

Example:
Situation: Your client is going to the local clinic, which is widely known in the community as the agency that provides services to persons with AIDS.

Solution:
Create the following service:
Agency Name: ABC Organization (Your agency name)
Program Name: ABC Organization (Your agency name)
Service: Health and Well Being

***F.Y.I.*** *During our last needs assessment analysis, Health and Well Being (HWB) ranked as the 2nd highest need of our Katrina clients. Health and Well Being includes physical, mental and spiritual needs.*