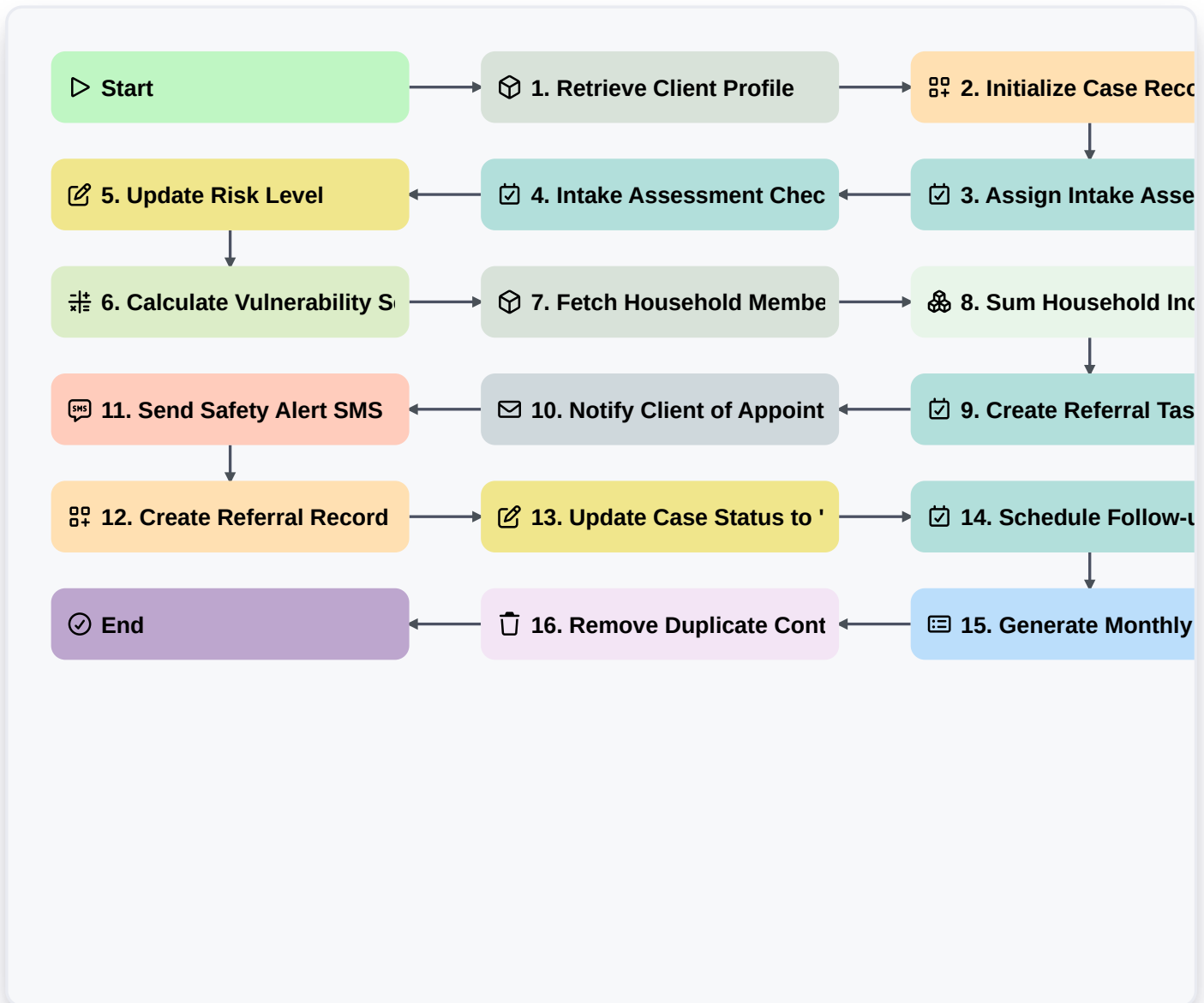


# Social Work Case Management Process



## ▷ Start

Start of the Workflow/Process.

## 📦 1. Retrieve Client Profile

Fetch existing client information from the Client Data Model to populate case details.

## 📋 2. Initialize Case Record

Create a new entry in the Case Management Data Model to track the new social work intervention.

## 📋 3. Assign Intake Assessment Task

Create a task for the assigned Social Worker to perform the initial home/office assessment.

## 📋 4. Intake Assessment Checklist

A set of mandatory steps to verify identity, safety risks, and immediate needs during the first meeting.

## 📋 5. Update Risk Level

Update the 'Risk Score' field in the Case Record based on findings from the assessment.

## 📋 6. Calculate Vulnerability Score

Execute a formula combining age, housing stability, and health status to determine priority level.



### **7. Fetch Household Members**

Retrieve all related entries from the Family/Household Data Model linked to the primary client.

### **8. Sum Household Income**

Aggregate the income entries of all household members to calculate total household financial capacity.

### **9. Create Referral Task**

Create a task for the Specialist to refer the client to external services (e.g., food banks, legal aid).

### **10. Notify Client of Appointment**

Send an automated email to the client with the confirmed assessment date and time.

### **11. Send Safety Alert SMS**

Send a critical text message to the client or guardian if an immediate danger is identified during assessment.

### **12. Create Referral Record**

Create a new entry in the Referrals Data Model to track the status of external service requests.

### **13. Update Case Status to 'Active'**

Update the Case Record status once the initial assessment is completed and plan is in place.

### **14. Schedule Follow-up Visit**

Create a recurring task for the social worker to perform monthly welfare checks.

### **15. Generate Monthly Case Summary**

Create a summary report of all active cases, progress updates, and intervention outcomes for departmental review.

### **16. Remove Duplicate Contact**

Delete redundant or erroneous contact entries found during the data cleaning phase of intake.

### **End**

End of the Workflow/Process.