

# EXCELLENCE IN HOUSING:

## Weekly Case Review

**OrgCode Consulting, Inc.** is pleased to share this document as part of a collection of the most requested resources from our **Excellence in Housing** training series. These documents are intended for professionals who have been properly trained on these tools and practices.

For more information about this resource, training, or other available resources, please visit us online at:

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## Weekly Case Review

Team Leader:

Date:

### Weekly Case Review Template *Sample*

Client	Lead	B/U	Most Recent Acuity	Prior Acuity	Case Plan Priorities	Next Visit Objectives	Next Visit	Key Notes
Alma, L.	Brent	Dave	42	44	Managing tenancy Physical Health Legal	Discuss strategies to decrease/address losing keys  Make appointment with heart specialist  Ask about going to the library	June 29 @ 8am	Court - July 7 @ 1pm
Bing, S.	Jim	Brent	33	33	Meaningful daily activities  Social Relationships & Networks Substance use	Readiness Ruler RE: forklift operator training  Ask about son's visit  Discuss NA meeting options	June 28 @ 2pm	N/A
Cameron, L	Brent	Jim	40	46	Substance use Medication Managing tenancy	Online AA meeting exposure  Update Wellness Recovery Action Plan  Set meeting date with superintendent to discuss bathroom damage	June 25 @ 11:30	Court ordered anger mgmt begins July 2

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