**Questions for all clients during case conferencing**

1. **Who will be following up with this client (if not already assigned)?**
2. **If client claims a disability:**

* Do they have a disability verification, SSI/SSDI award letter or VA Disability Paystub?
  + If yes, make sure it is uploaded into HMIS or sent to non-HMIS listholder to be added to their packet.
  + If no, who can assist?

1. **Has homelessness been verified? Does the amount of verification match the client’s reported homelessness?**

* If yes, is it uploaded into HMIS or sent to non-HMIS listholder to be added to packet? (If the client has homelessness verification from a domestic violence provider DO NOT upload into HMIS. If you have seen the letter or verified from the shelter, please use the domestic violence homelessness verification template).
* If no, who can assist?

1. **Does client have the following documents?**

* Social security cards for all household members
* Birth certificates for all children
* Proof of income (if applicable)
* State issued photo ID for all adults
* If yes, is it uploaded into HMIS or sent to non-HMIS listholder to be added to packet?
* If no, who can assist?

1. **What is the client’s housing plan?** Examples: client is beginning to look for employment and plans to be self-sufficient within a year; client has applied with the PHA and is waiting on a disability determination.

* Is this plan entered into prioritization notes in HMIS or non-HMIS list?

**6. Does the client have any barriers that would prevent them from being housed if offered assistance?** Examples: incarcerated, inpatient treatment, hospitalization, mental health symptoms, unable to locate, etc.

* If yes, can the client begin working a housing plan within a week? Examples: attend voucher appointment, contact landlords, view potential units.
* If the client cannot begin working a housing plan within a week, wait to refer the client to a program until they are able to work a plan within a week.

**7**. **Does the client have any immediate referral needs?** Examples:mental health service referral, substance use service referral, victim services referral, utility assistance, etc.