

Goal -

Provider Sioux City - Center for Siouxland Bridges West (527)

Case Manager

Date Goal was Set 06/05/2014

Classification Financial Stability

Type Obtain money management skills/credit counseling

Goal Description

Target Date

Overall Status In Progress

If Closed, Outcome

If Partially Complete,
Percent Complete

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Outcome at Follow Up

Case Notes

Provider	Case Manager	User Creating Note	Date	Note
Sioux City - Center for Siouxland Bridges West		Mary Smith	04/01/2015	going to have her credit score pulled again. Gotta read the book and budgeting
Sioux City - Center for Siouxland Bridges West		Mary Smith	04/01/2015	has gotten the boys registered for summer daycare and btb.
Sioux City - Center for Siouxland Bridges West		Mary Smith	03/24/2015	She also paid all of her registration and taxes on the car
Sioux City - Center for Siouxland		Mary Smith	03/04/2015	She got her license back.

Bridges West				
Sioux City - Center for Siouxland Bridges West		Mary Smith	02/17/2015	Her taxes should be in her bank by Thursday.
Sioux City - Center for Siouxland Bridges West		Mary Smith	02/10/2015	They received the taxes. She has been checking online as well.
Sioux City - Center for Siouxland Bridges West		Mary Smith	02/03/2015	talked with credit counselor about her money and tracking that money. They continued to tweak her budget and she is continuing to read the book.
Sioux City - Center for Siouxland Bridges West		Mary Smith	02/03/2015	got a payment plan worked out for student loans of \$5 per month to help with that deferment.
Sioux City - Center for Siouxland Bridges West		Mary Smith	01/16/2015	trying to figure out her county fines. They said that she has to go into have court because she never went in for that when she received the tickets. She is working on finding a court date the works with her schedule. She is keeping her receipts.
Sioux City - Center for Siouxland Bridges West		Mary Smith	11/20/2014	She requested a application for the caps program
Sioux City - Center for Siouxland Bridges West		Mary Smith	10/22/2014	said that they are going to redo her budget and plan. She said it went well.
Sioux City - Center for Siouxland Bridges West		Mary Smith	10/15/2014	There was not a time frame given for the IDA-but she is going to call again.
Sioux City - Center for Siouxland Bridges West		Mary Smith	09/26/2014	She went to get on the IDA waiting list and she was told that there was a waiting list. The girl that helped her did not offer much information.
Sioux City - Center for Siouxland Bridges West		Mary Smith	09/04/2014	She has some money in savings and she just got savings and checking account. She also will have her checks direct deposit and she is having \$25 in savings each check for sure. She has not checked into the IDA program yet.

Sioux City - Center for Siouxland Bridges West		Mary Smith	07/22/2014	The next paycheck is Friday-she is to pay program fees and get a few little things that they need.
Sioux City - Center for Siouxland Bridges West		Mary Smith	06/30/2014	She said that she starts promise jobs tomorrow. She couldn't go today because of a dentist appointment and she has a note. She also got a call back for nursing home for a 2-10 shift. They are set to go for the in-home daycare. The daycare is already set up.
Sioux City - Center for Siouxland Bridges West		Mary Smith	06/16/2014	credit counselor is going to pull her credit report.
Sioux City - Center for Siouxland Bridges West		Mary Smith	06/05/2014	applied for FIP. She did the application. She has the card but is waiting on the benefits. She is going to pay as soon as those benefits come on the card. As soon as she get the award letter.

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Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Date _____ Client Signature _____

Date _____ Case Manager Signature _____