



KINSHIP NAVIGATOR FIDELITY MONITORING FORM

For this form the “Full Needs Assessment” includes the following: Intake form, needs assessment, and goal setting form. Please note, R & R services include support groups.					
Unique ID number:		County:			
	Yes	No		Yes	No
Intake completed Date:			Offered an intake appointment for CM?		
Consent Date:			Client agreed to enroll in CM?		
Baseline assessment					
a. Prescreening Tool completed			Date it was completed:		
b. Family Needs Assessment completed			Date it was completed:		
c. Goals Set			Date it was completed:		
<ul style="list-style-type: none"> Enter baseline assessment & prescreen date into database tracking system 			Date it was completed:		
Three week follow up complete			Date it was completed:		
a. Three week follow up					
Three-month follow up			Follow-up attempted 3 times	<input type="checkbox"/> Yes	<input type="checkbox"/> No
a. Three-month Follow-up			Date it was completed:		
b. Goals Reviewed			Date it was completed:		
<ul style="list-style-type: none"> Uploaded Fidelity form into CM tracking system 			Date it was completed:		
If client reached all goals by the three-month appointment, client chose:					
<input type="checkbox"/> I & R services (service as usual and case management closed)		<input type="checkbox"/> Set new goals		<input type="checkbox"/> Terminate all navigator services	
		<input type="checkbox"/> Continue same goals			
If Case Management Closed at 3 Months: * Client survey sent to caregiver by phone, email or phone			Date it was sent/arranged:		
Six-month follow up			Follow-up attempted 3 times	<input type="checkbox"/> Yes	<input type="checkbox"/> No
a. Six-month Follow-up			Date it was completed:		
b. Goals Reviewed			Date it was completed:		
c. Client survey sent to caregiver			Date it was sent:		
<ul style="list-style-type: none"> Uploaded Fidelity form into CM tracking system 			Date it was completed:		
<input type="checkbox"/> I & R services (service as usual		<input type="checkbox"/> Terminate all		<input type="checkbox"/>	

[Type here]

and case management closed)		navigator services	
Case Closed			Date it was completed:
• Uploaded Fidelity form into CM tracking system			Date it was completed:
Closure Survey Sent			Date it was completed:
Client Survey Received			Date it was completed:
6 Mo. Survey Sent			Date it was completed:
6 Mo. Survey Received			Date it was completed:
Education Offered			Date it was completed:
Support Group Offered			Date it was completed:
Concrete Goods Received			Date it was completed:
Emergency Funds Received			Date it was completed: