



Case Manager Checklist

Thank you for using the Philadelphia Furniture Bank to furnish your client's new home! Please make sure to read this list prior to your visit to ensure that your client is prepared for the shopping appointment and their furniture is distributed as quickly as possible.

Determine who is Responsible for Payment

Determine what fees your client will incur during their visit (a full list of fees is included [here](#)) and decide who is responsible for payment – your agency or your client.

- If your client is responsible for payment, ensure that they are prepared to pay the fee onsite during the appointment. We accept cash, money order, or credit card for client payments; the cardholder must be present at the appointment if using a credit card.
- Agency payments will be invoiced and can be paid by check or credit.
- No-shows, cancellations less than 48 hours before the appointment, and clients who keep their appointments but don't select any furniture will incur a \$25 fee.

Arrange Transportation

If your client chooses self-transportation, the transportation must be present at the start of the appointment. Clients will not be permitted to select furniture until transportation has arrived.

Arrange Child Care

Children are not allowed at the warehouse at any time for safety reasons. We do not allow the case manager to watch children outside while the client chooses furniture.

Conduct a Home Visit

You or someone at your agency must conduct a home visit prior to your shopping appointment to measure doorways, hallways, staircases, and any other areas where it may be difficult to fit furniture to ensure the items your client chooses will fit in the space. We will ask questions about accessibility for the apartment or home during the appointment and need to know of any potential delivery issues.

Attend the Shopping Appointment

All clients must be accompanied by a case manager or other Member Agency representative.

- If a case manager other than the referring case manager will be accompanying the client, please put their contact information on the referral form in the space provided.

Review our Policies and Procedures

It is the responsibility of the referral staff of an agency to ensure that every case manager who comes to the Furniture Bank knows and understands our [policies and procedures](#).

- Our furniture is used and distributed by us as is.
- All furniture has been examined and treated for insect infestation and is certified pest-free.
- There are no other guarantees as to the condition or functionality of our furniture.