

CM 101: Case Note Checklist



Yes	No	N/A	
<input type="checkbox"/>	<input type="checkbox"/>		The name of the case manager is present.
<input type="checkbox"/>	<input type="checkbox"/>		The name of the client is present.
<input type="checkbox"/>	<input type="checkbox"/>		The interaction was conducted in a language the client understands.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The name of the interpreter is present (as necessary).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contact information for new community providers and/ or referrals <u>have</u> been included.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The client has signed confidentiality release forms (as necessary).
<input type="checkbox"/>	<input type="checkbox"/>		The note records an objective account of the interaction.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	The note includes an assessment of progress made toward goals identified in the client's wellness plan.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Any new barriers to wellness plan goal completion are noted.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Errors should have a line through incorrect information. Write error, <u>initial</u> and date.
<input type="checkbox"/>	<input type="checkbox"/>		The entry is signed and dated.



As adapted from “NYC Department of Youth and Community Development Case Management Standards Toolkit.”