

Client file – contact charting

Client file: name: Lee, Maria

Date: May 11, 20XX

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Date of contact: May 11, 20XX – 90 minutes appointment with Maria Lee at her home.

Contact is to review progress and next steps on health and parenting goals.

She expressed some concern about how the May 2 meeting had went with the school social worker but was able to understand the importance of continuing with small steps rather than giving up as she has in the past. Shane has missed two days of school since the meeting. Maria initially had trouble seeing the positives of the meeting but towards the end of the topic she informed this case manager that the school social worker had actually contacted her after the meeting. Maria plans on calling her back to set up a weekly meeting schedule to make progress towards her objective of improving Shane's school attendance. Maria had not made a list of small steps she could take to establish a routine for Shane. We discussed her ideas of how she can create a "home environment" that supports positive school focus (as discussed at meeting with social worker). She agreed to work on this for our next meeting. Discussed resource exploration if there are any parent support groups or parenting classes that would be available to her. Case manager will do some exploring

Maria reported that the new pharmacy arrangement has been working out well and she has no problems with the automated system and receipt of her medications by mail. She attended her annual physical appointment last week but has not yet received the results of her blood sugar levels. She expressed some concern about the possibility that she has diabetes. This case manager will speak with Maria about this further at the next meeting following the exam results. Case manager shared information on closest health clinic that is in provider network of Maria's health plan. We will discuss finding a new doctor and possible switch to this clinic once results of blood testing and follow up appointment are done.

Next contact scheduled for May 22 to schedule dental appointment at new clinic; review progress on parenting techniques; and discuss results of blood test.

Maria Lee
Case Management Client

Rob Jones
Senior Case Manager