

Client file – contact charting

Client file: name: Lee, Maria

Date: April 13, 201X

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Date of contact: April 13, 201X – 80 minutes appointment with Maria Lee at her home.

Initial appointment with Maria Lee. Maria was referred for case management services following a recent psychiatric hospitalization. This is the first time that Maria has had case management services.

Contact was spent explaining what mental health targeted case management services are, beginning assessment and goal planning, and in establishing a working relationship. (see beginnings of functional assessment in client file.)

Maria is divorced and mother of two children – Jessica (age 8) and Shane (age 6). Maria's ex-husband lives in Maplewood. The children see him on alternating weekends. He has remarried and has a newborn daughter. He pays child support; payments are somewhat inconsistent according to Maria.

Maria lives in the two bedroom apartment in Shakopee. The apartment is rent subsidized. Maria does not have a car; she relies on family members and friends, and limited public transportation.

Maria was born and raised in Brookings, South Dakota (not North Dakota as indicated in the referral materials). She moved to the Twin Cities following high school to attend college. Maria is Hispanic-American. Her grandparents moved here from Mexico. Maria is bilingual. Her grandparents and father are deceased. Her mother lives with Maria's siblings in Brookings. She has 6 siblings; she is the fifth in birth order. Two siblings live in the Twin Cities area.

Maria has concerns about her son's apprehension about school and resulting absences. She expresses concerns about her competence as a parent. Maria has serious symptoms with her asthma.

Maria reports no abusive relationships, or intent or impulse to harm herself.

We discussed "concurrent documentation"; and Maria agreed that she would like "to give it a try" to see and sign off on contact entries and goal plans.

Plan is to meet again on April 16 to continue assessment and develop preliminary ICSP. Maria seems very receptive to case management services, and making some changes in her life.

Maria Lee
Case Management Client

Rob Jones
Senior Case Manager