

Client file – contact charting

Client file: name: Lee, Maria

Date: April 23, 20XX

Date of charting: April 23, 20XX

Date of contact: April 23, 20XX – 90 minutes appointment with Maria Lee at her home.

Contact is to continue development of Functional Assessment and complete initial Individual Community Support Plan.

See initial ICSP dated April 23, 20XX in client file.

Maria was interested in initial focus on her parenting to help Shane, and addressing her health needs.

We discussed value of meeting with school social worker to discuss Shane's concerns about school. Maria expressed hesitance to contact the school social worker on her own. She provided me with the phone number for Shane's school social worker and we telephoned her on the speaker phone. The social worker was receptive to a meeting which we scheduled for May 2 at 3:00 PM. I will accompany Maria to this meeting. Maria seemed relieved to accomplish this task and stated that she was optimistic about the upcoming meeting. We plan another contact to discuss this topic before the meeting with the school.

Release signed to permit communication with Maria's former mother-in-law. This followed discussion of mother-in-law as source of support for transportation, Maria's children, and Maria. See signed release of information form dated April 23, 20XX in client file.

Maria agreed to call her "old" clinic and schedule an appointment for follow up on her high blood sugar level. She will talk to her mother-in-law about assistance with transportation.

Case manager will explore health and dental clinics closer to her new home, and discuss at future contact.

Next contact scheduled for May 1st at 11am to prepare for meeting with school social worker.

Maria Lee
Case Management Client

Rob Jones
Senior Case Manager