

CASE MANAGEMENT CLIENT CHART DOCUMENTATION CHECK LIST

Case Manager _____

Chart Reviewed by _____

Eligibility

- Verification of HIV infection (signed verification from MD or nurse practitioner, copy of medical chart page , copy of lab report).
- Verification of income within past 12 months (case note should document request for verification if this is the first visit and client did not have documentation).

Case Notes

- Documentation of presenting issue (client need)
- Documentation of assessment, acuity scale completion, and Case Management Tier assigned.
- Documentation of care plan (for Tier I, may be brief)
- Documentation of action taken, including assessment completion, care plan development, referrals, contacts to assist to access services, assistance filling out applications, follow-up with client, etc.
- Documentation of outcome of action taken. Was need met? Note if resolution of issue is still pending and plan for any follow-up action.
- Note total time spent for each action.
- Signature of case manager.