***Case Note Reference Sheet***

Why are good case notes so important?

1. Represent the consumer situation. Case notes recount the story, meaning the client’s history, present circumstances, reflections, and actions.
2. Provide a record. Case notes provide a documentation of the services provided, including a record of the interaction between the client and the worker. Provides Documentation – leaves a “paper trail.” Provides verification of activities
3. Support an action. The information found in case notes can justify why certain actions are necessary or considered most effective.
4. Improves case management. Keeps you focused on what you are working on with the family. Helps the next worker, co-workers, and supervisors.
5. Captures relevant data elements. Case notes should be an accurate snapshot of the individual.
6. Sequential tracking and reporting of customer contact and progress! Helps us document progress of services on the waiver. It also helps us show if something is needed.
7. Case notes help case managers monitor quality of services.

Case Note Requirements:

1. Each consumer on your caseload needs one case note a month. These need to be completed by the 21st of each month.
2. Case notes need to be completed within 48 hours of event per Inspire requirements.
3. Case managers are not to use the same case note every month for consumers.
4. Case notes need to review facts not opinions.
5. Case notes need to be in complete sentences. Use correct spelling, complete sentences, capitalization, and punctuation. Do not use abbreviations or text type writing.
6. Case notes need to be clear and concise. Easy to understand and read.
7. Case notes activity date will always be the date the event happened, not the date you are completing the case note.
8. When reviewing provider reports document what report was about in case note.
9. Case notes need to show follow ups from Case Manager. If a CM checks on an individual there should be a case note describing the update. If CM states they are going to do something it is important to follow through with action taken by CM in a case note.

***CASE NOTE EXAMPLES FOR MEETINGS***

* ***QUARTERLY MEETING (90-Day Checklist)***

Status: (Consumer) participated in his/her quarterly meeting on \_\_\_\_\_\_\_ at \_\_\_\_\_\_ in \_\_\_\_\_\_, IN. Team members present included: and (CM first and last name/Inspire CM.

(CM to write a narrative of what was discussed during meeting. Narrative needs to be personal to the consumer)

Actions: All areas were addressed including health and safety, family contact, community access, medical needs and appointments, current medications, employment, finances, programming goals and the PCISP. CM completed the 90-day checklist. CM offered Choice to consumer for all services being received. Consumer's next quarterly meeting is scheduled for \_\_\_\_\_.

* ***ANNUAL MEETING (Monitoring Checklist)***

Status: (Consumer) participated in his/her Annual PCISP meeting on \_\_\_\_\_\_ at \_\_\_\_\_\_ in \_\_\_\_\_\_, IN. Team members present included: and (CM first and last name)/Inspire CM.

(CM to write a narrative of what was discussed during meeting. Narrative needs to be personal to the consumer)

Actions: The team reviewed and discussed the new annual PCISP. All areas were addressed including health and medical, family contact, community access, medical needs and appointments, current medications, employment, finances, and safety. The team developed the task/strategies for the upcoming year. CM completed the monitoring checklist. CM offered Choice to consumer for all services being received. Consumer’s next quarterly meeting is scheduled for \_\_\_\_\_\_.

* ***INTAKE MEETING***

Status: CM (CM last name) held (Consumer’s) intake meeting at \_\_\_\_\_\_ on \_\_\_\_\_\_. Team members present for meeting included: and (CM first and last name/Inspire CM).

(Then give a narrative of consumer, living situation, any issues/concerns, etc.)

Actions:

CM will complete initial PCISP and make any changes as necessary once services are requested to be added. CM (last name) will email the family provider pick lists for the services discussed during the meeting and will continue to follow up with the family/consumer as needed if they have any questions in regard to services.

**(CM needs to ensure that while completing the case note the intake meeting tab is selected in the category section. In the level of interaction section, the intake meeting held needs to be selected.**

**CASE NOTE EXAMPLES FOR DAILY TASKS**

CM/ (last name) checked EDS claims to check the billing accepted of services. Nothing was noticeably abnormal with billing and matched - services on the plan up to November of 2017.

CM/ (last name) completed an update to consumer grid to make sure \_\_ meeting dates were accurate for quarterly meetings, annuals, and LOCSi due dates on 7/3.

CM (last name) sent an email to Provider name, PD/ on 11/3 to request monthly reports that are missing in the document library.

CM/ (last name) checked consumer name documents library to make sure her quarterly reports are uploaded for all services. They are all up to date.

CM/ (last name) completed consumer name LOCSi by cloning on 10/31 with the previous LOCSi answers collected by consumer name.

CM/ (last name) received the Annual NOA for consumer name on 5/29 and emailed it to the team.

CM/ (last name) emailed meeting reminders to consumer name team.

CM/ (last name) was available to respond to all needs. No actions were needed this week.

CM/ (last name) was available to respond to all needs. CM reviewed, corrected if need be, and confirmed RHS/Days information in the portal.

CM/ (last name) was available to respond to all needs. CM reviewed residential addresses versus mailing addresses and made necessary adjustments in the portal.

CM/ (last name) was available to respond to all needs. CM reviewed and ensured that the following information was entered into the portal: SS#, RID#, Address, County, State, Zip Code, Gender, Phone, Waiver State Date, Slot #, Marital Status, Living Arrangement, Household Size, Housemate needed or not.

CM/ (last name) completed a file review, checking deadlines on CCB, LOC, Quarterly Meetings, and making sure everything is in order.

On 4/92020 CM Barrow submitted an updated CCB converting 70 hours of CHIO over to RHS hourly due to Levi not being able to go out into the community because of the recent State mandated COVID 19 stay at home order. CM Robinson received an email from Nioka Natali/grandmother that Nikayla is currently visiting her mother and will notify CM when she gets home. CM educated family on the importance of meeting as soon as possible. CM will continue to try to schedule intake meeting.CM Robinson received an email from Nioka Natali/grandmother that Nikayla is currently visiting her mother and will notify CM when she gets home. CM educated family on the importance of meeting as soon as possible. CM will continue to try to schedule intake meeting.CM Robinson received an email from Nioka Natali/grandmother that Nikayla is currently visiting her mother and will notify CM when she gets home. CM educated family on the importance of meeting as soon as possible. CM will continue to try to schedule intake meeting.CM Robinson received an email from Nioka Natali/grandmother that Nikayla is currently visiting her mother and will notify CM when she gets home. CM educated family on the importance of meeting as soon as possible. CM will continue to try to schedule intake meeting.CM Robinson received an email from Nioka Natali/grandmother that Nikayla is currently visiting her mother and will notify CM when she gets home. CM educated family on the importance of meeting as soon as possible. CM will continue to try to schedule intake meeting.On 4/92020 CM Barrow submitted an updated CCB converting 70 hours of CHIO over to RHS hourly due to Levi not being able to go out into the community because of the recent State mandated COVID 19 stay at home order.