

TARGETED CASE MANAGEMENT INITIAL REVIEW

1. Date, caller demographics (name, CBC)
2. Provider of service (name, address, phone number)
3. Reason for requested service, e.g. referral source, why now?
4. Diagnosis (all five axes)
5. Risk Assessment (e.g. suicidal, homicidal, plan)
6. Medical/Medications (physical and behavioral)
7. Psychosocial Summary (abuse/neglect cultural, legal, substance abuse)
8. School (grade, special ed, absenteeism, suspension/expulsion)
9. Location where problem behaviors occur
10. Previous treatment (type of service/support, dates, outcome; is enrollee at risk for a higher level of care? why?)
11. Current providers and supports (type of service/support, date began)
12. Strengths
13. Goals (behavior-based)
14. Barriers
15. Discharge plan
16. Anticipated length of treatment

CONCURRENT REVIEW

1. Date, caller demographics (name, CBC)
2. Provider of service (name, address, phone number)
3. Diagnosis (all five axes)
4. Risk Assessment (e.g. suicidal, homicidal, plan)
5. Changes in medical/medications (physical and behavioral)
6. Changes in psychosocial situation (abuse/neglect cultural, legal, substance abuse)
7. Changes in school (grade, special ed, absenteeism, suspension/expulsion)
8. Changes in current providers and supports (type of service/support, date began)
9. Strengths
10. Progress toward goals (behavior-based)
11. Barriers
12. Discharge plan
13. Anticipated discharge date