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Case Note Template

Case notes are important tools used to track service providers' interactions with clients and document relevant program data. This template is an example of how case notes may be standardized for your program. This template is intended to be customized to align with your program's unique needs and compliance requirements. This document should not be regarded as a complete compliance tool for any particular grant or program. Some examples of modifications to this template include:

- Modifying the list of programs offered by your agency
- Including sections for case manager or supervisor signatures, if required

A complete case note should always document date of service, details of service, people involved, and other logistical information, as well as next steps.

Remember the following tips:

- Spell out all acronyms the first time they are used on a template.
- Complete the case note as soon as possible, preferably on the same day as the interaction, while the details of the meeting are top of mind.
- Document whether you used interpretation. When using a telephonic or video interpreter service, note the interpreter's name and unique interpreter ID code.
- Provide enough detail in the case note to plan services effectively while still safeguarding client confidentiality.
- Be objective, and avoid unnecessary elaboration or judgement. When in doubt, consider how the client might react if they read their own case files.
- Clients can always refuse services or enrollment into programs. Document such refusals or other client requests in the case note.
- Keep all client case notes in their individual case files. Do not mention clients from other case files by name or by other identifying information.
- You may embed case note templates in electronic recordkeeping systems if you do not chart on paper.

You can find a sample case note on the final page of this document. For more information, see Switchboard's guide Creating High-Quality Case Management Documentation.

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[Agency Letterhead]

Client Name(s):		**Case/File #:**	
Programs Client is Enrolled In (check all that apply):	☐RSS ☐ MG ☐ PC ☐RCA ☐RSIG ☐RYM ☐CP ☐Other: Specify	**Date of Eligibility:**	Click here to enter a date.
Language(s) Used in Meeting:		**Interpreter Name/ Agency and Method (if applicable):**	
Date of Service:	Click here to enter a date.	**Start and Stop Time:**	
Place of Service (home, school, office, library, etc.):		**Mode of Delivery (face-to-face, telephone, video-conference, etc.):**	Choose an item.
Reason for Meeting:			
Summary of Meeting:			
Plan for Next Contact or Next Steps:			
Progress Toward Goals:	☐Minimal ☐Moderate ☐High ☐Not Applicable		
Case Manager Printed Name:			
Case Note Date:			

Completed example:

[Agency Letterhead]

Client Name(s):	Fulana Al-Fulani	**Case/File #:**	JO-123456
Programs Client is Enrolled In (check all that apply):	☐RSS ☒ MG ☐ PC ☐RCA ☐RSIG ☐RYM ☐CP ☐Other: Specify	**Date of Eligibility:**	11/17/2022
Language(s) Used in Meeting:	Arabic	**Interpreter Name/ Agency and Method (if applicable):**	Fatima (in-person)
Date of Service:	10/2/23	**Start and Stop Time:**	1:01 – 1:56 PM
Place of Service (home, school, office, library, etc.):	Office	**Mode of Delivery (face-to-face, telephone, video-conference, etc.):**	Face-to-face
Reason for Meeting:	Check-in on employment needs		
Summary of Meeting:	Client and Case Manager (CM) met in CM's office for scheduled appointment to check in on employment needs. Discussed Client's difficulty paying her rent this month due to a recent cutback in hours at her job from 35 hours per week to approximately 12 hours per week. Client reported being frustrated by cutback of work hours and is worried about paying rent next month. CM informed Client that the agency may have rental assistance funding and will check in with program manager.		
Plan for Next Contact or Next Steps:	CM will determine rental assistance options for this month. Client will meet with work supervisor this week to discuss when her 35-hour weekly schedule might resume. Client and CM made plan to meet again in one week on 10/10/23 to discuss Client's work hours, rental assistance options, and whether Client will need to begin searching for new employment.		
Progress Toward Goals:	☐Minimal ☒Moderate ☐High ☐Not Applicable		
Case Manager Printed Name:	Jane Doe		
Case Note Date:	10/3/23		