

Observation of Case Manager – Client Interaction

Case Manager Name		Date	
Client Name		Case #	
Type of Visit:	<input type="checkbox"/> Comprehensive <input type="checkbox"/> Follow-up		
Scheduled start time		Actual start time	
		Client on time?	

1. The case manager demonstrated appropriate professionalism by:	Y, No or N/A
a. Greeting the client/parent/guardian and introducing self and staff conducting the observation.	
b. Arriving to the session prepared and on time	
2. The case manager demonstrated appropriate communication by:	Y, No or N/A
a. Working with client/parent/guardian to identify needs.	
b. Asking open ended and probing questions.	
c. Evaluating client’s understanding of information discussed.	
d. Allowing enough time for client/parent/guardian to express needs and/or concerns.	
e. Problem solving with client.	
f. Addressing language and cultural issues (when applicable).	
g. Summarizing what was discussed with client/parent/guardian and the next steps.	
3. The case manager provided appropriate service plan intervention as evidenced by:	Y, No or N/A
a. Giving choice of referral sources (when choice is available)	
b. Using support materials when giving information (i.e. referral forms, brochures, etc.).	
c. Demonstrating adequate knowledge of community resources.	
d. Following up on referrals previously provided.	
e. Coordinating services with third parties during follow-up visit (when applicable).	
f. Obtaining consent from client/parent/guardian to communicate with third parties (when applicable).	
g. Ensuring that interventions are individualized to client’s needs.	
4. The observed contact included all requirements for a visit.	Y, No or N/A
a. If a comprehensive visit was observed, the case manager completed all necessary protocol with the client/parent/guardian.	
b. If a follow-up visit was observed, the case manager reviewed all service plan needs with the client/parent/guardian.	

Comments

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