

Targeted Case Management Program Client Case Documentation Checklist

Note: All client information must be consistent across all supporting documentation provided for any TCM encounter. Inconsistent information, such as the inconsistent SSNs or differing dates, may result in a rejection of the Encounter by DHCS Standards.

Types of services include comprehensive assessment and periodic reassessment, referral and related activities, development of a specific care plan, and monitoring and follow-up activities. Case records with assessments and care plans must be included along with the components of the checklist below. For further information, please refer to Section 8 of the TCM Provider Manual.

TCM Encounter Case Notes Checklist

Component Checklist	Yes	No	Comments
Encounter Number			
Date of Service			
Case Manager Name			
Case Manager NPI			
Client Name			
Date of Birth			
Medi-Cal ID			
Client ID			
Location			
TCM Encounter Type			
Summary of TCM Encounter Visit			
Signature of Case Manager			