

## 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			