

ACTIVE VERBS/PHRASES THAT CAN BE USED TO DOCUMENT TARGETED CASE MANAGEMENT (TCM) SERVICE INTERVENTIONS

***This is not an exhaustive list**

| Assessment: | Referral & Related Activities: |
|---|---|
| Administered needs evaluation tool | Advocated... |
| Analyzed needs evaluation tool with client... | Assisted client in/with...by... |
| Assessed/evaluated needs for... | Coordinated linkage to ancillary services... |
| Assessed/evaluated available resources... | Coordinated linkage to community resources... |
| Assessed/evaluated available support networks... | Coordinated placement... |
| Completed needs assessment... | Discussed options in resources... |
| Determined... | Educated and informed about resource... |
| Established need for or continuation of TCM services... | Encouraged use of/engagement in...(linkage/referral)... |
| Gathered history... | Established communication between client and (resource)... |
| Gathered information... | Established connections between client and (resource)... |
| Identified needs/potential needs... | Facilitated client linkage to referral... |
| Re-Assessed/re-evaluated needs for... | Implemented needs plan... |
| Re-Assessed/re-evaluated available resources... | Linked client to...(resource) to address...(need)... |
| Re-Assessed/re-evaluated available support networks... | Obtained ... to address ... need... |
| Reviewed with client / significant support person... | Referred client to...(resource) to address...(need)... |
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| Plan Development: | Monitoring & Follow Up: |
| Approved plan... | Adjusted/modified/refined/reworked plan... |
| Clarified plan... | Arranged services with providers after a change in the care plan... |
| Coordinated... | Clarified progress of plan... |
| Created plan... | Evaluated effectiveness of plan to meet needs... |
| Determined if changes were necessary to plan... | Follow-up to ensure plan is appropriately implemented... |
| Developed plan for... | Follow-up to monitor if plan addresses client needs... |
| Discussed planning... | Gave/Provided feedback... |
| Established plan for... | Monitored client's response with plan... |
| Explored plan options... | Monitored adequacy of the plan... |
| Explored barriers in plan and with adherence... | Monitored adherence with the care plan... |
| Focused/refocused on planning... | Recommended... |
| Gave feedback on plan... | Reviewed with client/significant support person/team... |
| Helped client redefine plan... | Summarized... |
| Integrated strengths to expand on plan... | Tracked progress in plan... |
| Modified/adjusted plan... | |
| Monitored client's progress to revise plan... | |
| Planned for... | |
| Refined plan... | |
| Revised plan... | |
| Updated plan... | |
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