

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:
Analyzed...	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...	Referred client to...(resource) to address...(need)...
Plan Development:	Monitoring & Follow Up:
Approved plan...	Adjust/modify/refine/rework plan...
Clarified plan...	Arranged services with providers after a change in the CTP...
Coordinated...	Clarified progress of plan...
Created plan...	Evaluated effectiveness of plan to meet needs...
Determined if changes are 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 CTP...
Focused/refocused on planning...	Recommended...
Gave feedback on plan...	Reviewed...
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...	