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Case Note Template

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CLIENT	CASE NUMBER	DATE OF CONTACT

CONTACT TYPE	DURATION	CASE MANAGER

PURPOSE OF CONTACT

Why the contact happened and which goal in the service plan it relates to.

WHAT THE CLIENT REPORTED

The client's own account, quoted where it matters, with who else was present.

WHAT YOU OBSERVED

Facts you saw or verified: the home, documents, behavior. No labels or guesses.

ACTIONS TAKEN

Referrals made, calls placed, forms completed, resources given.

PLAN AND NEXT STEPS

What happens next, who does it, and by when. Date of the next contact.

SIGNATURE

Name, credentials, and the date the note was written.

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Case Note Example: Home Visit

FICTIONAL EXAMPLE. NOT A REAL PATIENT. FOR ILLUSTRATION ONLY.

CLIENT	CASE NUMBER
M. Torres (fictional)	CM-2026-0418
DATE OF CONTACT	CONTACT TYPE
11/18/2026	Home visit
DURATION	CASE MANAGER
50 minutes	Alex Kim, LMSW

PURPOSE OF CONTACT

Scheduled home visit to review progress on goal 1 of the service plan, stable housing, and to complete the rental assistance application.

WHAT THE CLIENT REPORTED

Ms. Torres said the landlord gave her a written notice that rent is two months behind. She stated, "I can pay the December rent, not the back rent." Her adult son was present for the first 20 minutes.

WHAT YOU OBSERVED

Notice dated 11/14/2026 seen and photographed with the client's permission. The apartment was clean and heated. The refrigerator had food. Ms. Torres had her pay stubs for October and November ready.

ACTIONS TAKEN

Completed the county emergency rental assistance application with the client and submitted it online at 11:35. Gave her the confirmation number in writing. Called the landlord with her consent and told him an application is pending.

PLAN AND NEXT STEPS

Case manager will check the application status by 11/25. Client will bring her lease to the office on 11/21. Next home visit 12/2/2026.

SIGNATURE

Alex Kim, LMSW. Written 11/18/2026.