

What to Record

The following information should be recorded in the case record.

- Statements made by contacts during the course of case assessment or case planning.
- Information which is used in the development or refinement of an assessment.
- Information from any contact regarding the health, safety, welfare, or situation of a child.
- Information relating to the success or failure to achieve or perform activities.
- Changes in household composition, address, or living arrangements.
- Information affecting eligibility for services.
- Marked changes in appearance or functioning.
- All “in-person” or phone contacts with your client. Note the date and topic. Unsuccessful attempts to make contacts should also be recorded.
- Phone contacts made and received about your client.
- Correspondence sent out about your client or received from others about your client. Note the date and purpose; refer to file.
- Efforts to make referrals and the results of such efforts.
- All legal activities.

Taken from “Case Documentation”, SUNY Research Foundation c. 1994