Intake Summary

- Name of Client:
- Age/Sex of Client:
- Case file no.:
- Name of Worker:
- Source of referral:
- Date of case intake:
- Nature & No. of Contacts:
- Presenting Problem:
  - Nature of the problem i.e. The problem duration and the way the problem exhibits through behavior pattern and emotion
- Brief Social History: (the following elements can be included)
  - Genogram/family background and relationship
  - Health condition
  - Emotional condition
  - Living condition
  - Financial condition
  - Schooling/employment
  - History of violence/Abuse
  - Mental illness record
  - Supportive network
  - Previous service received and its effectiveness (if any)
- Case Assessment:
- Service Rendered:
- Recommendation for Follow-up:
  - Case goal
  - Case plan
    Persons to be contacted
    Issues to be discussed/intervened
    Referrals to be made

Other significant information (if any)

Process Recording

1. Name of client and case number: _____ (   )

2. Name of worker:

3. Date of interview:

4. Duration of session:

5. Session no.:

6. Objectives of the interview:

Supervisory Comments	Content – dialogue	Gut-level feelings	Analysis
Remarks from supervisor	Record word for word what happened - verbal interactions - non-verbal expressions C: W:	Worker's own reaction/feeling towards client and the interview	- Worker's analysis of client's behavior, feeling and interaction - Analysis of intervention strategies and skills

7. Worker's assessment:

- Diagnostic impression: (towards client's problem, progress, strength, etc.)

- Attainment of objectives

8. Treatment plan:

Resources (R-3)

Case Summary Recording

1. Name of client and case number: _____ ( )

2. Name of worker:

3. Date of interview:

4. Session no.:

5. Purpose of the interview:

   e.g. Follow-up on agreed goals

6. Content of the interview (what occurred during the interview):

   a. Report on attempts made and progress since last interview

   b. Reflection on feelings towards those attempts and change

   c. Problems identified

7. Services rendered and client's response:

   e.g. helped to ventilate, handled negative feelings to self

   e.g. Clarifying and prioritizing problems

   e.g. Emotional support

   e.g. Teaching social skills

8. Worker's assessment:

   a. Identifies and assesses factors that influence the situation

   b. Identifies and prioritizes potentially problematic issues

   c. Identifies and assesses obstacles to change

   d. Recognizes patterns of interaction/behavior, and assesses their impacts on the situation

   e. Identifies client's strengths, assets, and resilience

9. Attainment of intervention objectives

10. Assessment of intervention strategies and skills

11. Service plan / Treatment plan / Goals (follow-up actions or plan):

12. Self-Evaluation (if any) :

    e.g. values, attitude, knowledge, feelings, struggles, and difficulties emerged during the interview

Format of Case Assessment:

1. Name of client:

2. Name of worker:

3. Source of Referral:

4. Source of Information (Nature/ Number of Contacts):

5. Presenting Problem/ Request:

6. Summary of Contacts:

7. Case Analysis

8. Tentative Goals

9. Action plan

10. Services provided (if any)

Transfer Summary

1. Name of client and case number: _____ (   )

2. Name of worker:

3. Date of transfer summary:

4. Period under review:

5. Nature and number of contacts:

6. Presenting problem:

7. Case development:

   (a brief description of significant events, changes in work focus, services rendered and

   effectiveness etc.)

8. Diagnostic summary / impression:

9. Current problem and reason for transfer:

10. Client's acceptance towards the transfer:

11. Review of case goal/ case plan:

12. Recommendation on future plan:

Closing Summary

1. Name of client and case number: _____ (   )

2. Name of worker:

3. Date of closing summary:

4. Period under review: (Date of case opened and closed)

5. Nature and number of contacts:

6. Presenting problem:

7. Case development: (A brief description of significant events, change in work focus, services rendered and effectiveness etc.)

8. Reasons for closing:

9. Client's acceptance towards the termination

10. Review of case goal/case plan