

DOCUMENTATION FOR
TARGETED CASE MANAGEMENT (TCM)
MONTHLY REVIEWS

Each month every office is sent a list of eligible clients that are TCM qualified. This list may include In-Home or Out-of Home Target child/ren. Each caseworker is to have one case per month reviewed. Each office has a designated “TCM TRACKER.” The tracker reviews the files that are sent to them monthly. *During this review, the Tracker is looking for the following:*

NEEDS ASSESSMENT
SERVICE PLAN
SPECIFIC ACTIVITY IN THE ACTIVITY LOGS

The service plan needs to be ***current*** and specific in relationship to the CFTM. The activity logs need to have specific documentation of services provided to the target child/ren in relation to the service plan.

If the current service plan states that target child needs to have counseling and is struggling in school and in need of specific services, logs need to be “**service specific.**”

EXAMPLE OF PROPER TCM DOCUMENTATION: *Called target child’s counselor, Dan the Man, from Four Corners Mental Health. Dan stated that target child is participating very well in counseling and progressing and coping well. Target child still needs counseling services.*

OR

*I (caseworker) picked up target child from school. Took child to counseling/foster home/home. During the time that we spent together we, had a **PRIVATE CONVERSATION.** We discussed how things are going at foster home/home. How child is getting along with parents/foster parents. If there was anything that child needed. Talked about progress at school, etc.*

OR

I (caseworker) coordinated services with target child/ren at counseling/medical/school etc. Notified parents/foster parents of appointment. I (caseworker) called after scheduled appointment to ensure appointment was met and if any other services were needed for future coordination.

THE FOLLOWING IS NOT TCM DOCUMENTATION:

I attempted to contact client, went to the home no one there.

OR

Called Mental Health, left message

The caseworker must complete a written plan for each eligible child and update the plan as changes occur. The TCM service and family plan is contained within the child and family plan.

The child and family plan must identify the steps to obtain treatment or other services to meet each eligible child's medical, social, educational, or other needs. Each child must be named individually.

The plan steps must also indicate specifically **what the qualified caseworker is going to do** to help the child access services that meet the child's needs.

These activities may include such things as making referrals, coordinating service providers, monitoring work of the child and family team, tracking service provision, and evaluation of effectiveness of services to meet needs. **Estimated times frames also need to be included in the plan.**

The plan for eligible children within the same family on the same case may be included in the same plan. **However**, each child's plan for services must be **indicated separately**.

The caseworker must document provision of TCM services in **SAFE activity recording**.

In order to meet TCM requirements, activity recording must indicate *what TCM activities the caseworker completed* to ensure that the child's medical, social, education, or other needs were met, *in accordance with service plan objectives*.

Documentation needs to include:

- Date of targeted case management activity.
- **Eligible Child's Name** for whom the TCM activity was provided. If more than one eligible child is being served on the case, *each entry must specifically name each child for whom the TCM activity was provided*. Multiple names may be included in one entry if a single activity was completed for more than one child.
- **Type of contact**, such as a face-to-face visit, telephone contact, or written communication and where the contact took place, when applicable.
- **Duration** of the contact. **Who** the qualified caseworker communicated with, such as the eligible child, the child's family, caregiver, service provider, or other individual directly involved in providing or assuring the client obtains the services documented in the service plan.
- **Description** of the nature and purpose of the qualified caseworker's contact, such as referring for a specific service, coordinating multiple services, monitoring and follow-up, or evaluations of effectiveness of services, as included in the plan steps.
- **Next steps** to be taken to adapt to the child's continuing needs or status.
- **Caseworker Name** (TCM provider). This is automatically documented by SAFE as the person entering the data. If someone other than the caseworker is documenting the

caseworker's activities, then the TCM provider's name must be indicated within the text of the activity log.

TCM activities **need to be documented on an ongoing basis each month**. Best practice is that entries are **logged within 48 hours** of completing the activity. TCM can only be claimed for months in which SAFE activity recording documents that TCM services were provided.

**I HAVE BEEN TRAINED ON
AND I HAVE A CLEAR UNDERSTANDING OF
THE PROCEDURE OF “TCM DOCUMENTATION”**

Employee

Date

Supervisor

Date

Copies to:
--Employee
--Supervisor
--Regional Training Manager