**North Carolina Department of Health and Human Services**

**Division of Aging and Adult Services**

**Interim or Quarterly Client Review**

|  |  |
| --- | --- |
| **Client Name:** | **Date:**  |
| **Case #**  | **ID #**  |

Review was conducted: (**Check all that apply**):

[ ]  Adult Day Care Center [ ]  By telephone

[ ]  In client’s home [ ]  At nursing home/domiciliary care

[ ]  At DSS [ ]  Hospital

[ ]  In client’s relative’s home [ ]  \*Other – please explain below

\*

Information was obtained during the review period from: **(Check all that apply**).

[ ]  Client [ ]  Aide/paid assistant [ ]  Guardian

[ ]  Facility staff [ ]  Friends [ ]  \*Other professionals

[ ]  Primary caregivers [ ]  Family

If other, please explain:

Have there been any changes/events since the last review which have had a **SUBSTANTIAL** impact on the client’s/family’s life or need for services? If yes, summarize briefly below.

*Update face sheet to reflect any changes such as address, telephone, or household composition.*

**Review of the functional domains**

Please include in your summary new problems, worsening conditions, improvements, and new resources or accomplishments. (*Include information that documents the continuing need for services*.)

**Social**

**Environmental** (home and neighborhood)

**Economic**

**Mental/Emotional Health**

**ADLs and IADLs**

**Physical Health**

Summarize below any other significant events, contacts, or activities during the quarter (include dates) or attach relevant sections of your log notes.

Update service plan as needed and during each quarterly review with progress toward each goal and add new goals *The service plan form (include form number and name) should be updated as needed.*

      Click or tap to enter a date.

**Social Worker’s Signature Date**