

Case File Review Tool

Assign a value for each section to equal a score of 100 if all completed.

- All intake paperwork is signed, complete and in the file
- Intake note mentions reviewing limits to confidentiality, informed consent
- Any diagnosis is supported by assessment information
- Treatment plan involves client feedback and is updated as needed
- There is a progress note for each session
- All client billing is up to date

Optional/As needed:

- There is a signed release for any correspondence
- Each note includes a medical necessity progress statement
- Suicide or risk assessment and crisis plan created and follow up mentioned
- There are notes to describe any lapses in treatment
- Consultations are documented with reasoning for need
- Other: _____
- Other: _____

____:Score Areas to discuss: _____
