# Sample Case Management Checklist

Below is a beginning list of tasks that might be included in the referral, intake, case management, and discharge process. Personalize to fit your program needs.

## Referral and Intake

Youth referred to juvenile diversion by prosecuting attorney.

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| Send a referral letter is sent to the youth inviting them to enroll in diversion with instructions.   * An explanation of diversion and/or brochure also included with letter. * Alternatively, a phone call is made to the family discussing referral, diversion program, and possible telephone screening. * Follow up telephone calls or letters may be necessary. |  |
| * Enter referral into JDCMS. |  |
| Schedule an intake appointment. |  |
| At intake/enrollment appointment: |  |
| * Intake packet: |  |
| * + Intake form |  |
| * + Release of information |  |
| * + Program requirements and policies |  |
| * + Sealing of records information |  |
| * + Youth/Parent questionnaires |  |
| * Intake assessments: |  |
| * + Screening, such as NYS or Arizona screen. |  |
| * + Other screening and assessments if deemed necessary, such as YLS/CMI, Maysi, GAIN, etc. |  |
| * + 40 developmental assets |  |
| * + Screening, such as NYS or Arizona screen. |  |
| * + Other screening and assessments if deemed necessary, such as YLS/CMI, Maysi, GAIN, etc. |  |
| * Develop diversion plan with the youth and parents. Obtain all necessary signatures. |  |
| * Enter diversion requirements into JDCMS. |  |
| * Enter intake and enrollment date into JDCMS. Enter discharge date and discharge reason if youth decides to not enroll in diversion. |  |

## Case Management

Follow diversion contract plan for case management deadlines. Keep completion notes and dates up to date in JDCMS.

## Discharge

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| Enter final notes into JDCMS and print discharge report. |  |
| Send discharge letter to the family, discharging youth from the diversion program. |  |
| Send discharge letter to county attorney with a copy of the discharge a report. |  |
| Enter discharge date and reason in JDCMS. |  |
| Follow up to obtain exit surveys from parent and youth, if necessary. |  |