# 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.
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| * Enter referral into JDCMS.
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| Schedule an intake appointment.  |  |
| At intake/enrollment appointment:  |  |
| * Intake packet:
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| * + Intake form
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| * + Release of information
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| * + Program requirements and policies
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| * + Sealing of records information
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| * + Youth/Parent questionnaires
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| * Intake assessments:
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| * + Screening, such as NYS or Arizona screen.
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| * + Other screening and assessments if deemed necessary, such as YLS/CMI, Maysi, GAIN, etc.
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| * + 40 developmental assets
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| * + Screening, such as NYS or Arizona screen.
 |  |
| * + Other screening and assessments if deemed necessary, such as YLS/CMI, Maysi, GAIN, etc.
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| * Develop diversion plan with the youth and parents. Obtain all necessary signatures.
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| * Enter diversion requirements into JDCMS.
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| * Enter intake and enrollment date into JDCMS. Enter discharge date and discharge reason if youth decides to not enroll in diversion.
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## 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. |  |