

## CASE MANAGER INTERVENTION GUIDE

ACTIVE VERBS/PHRASES IN COMMONLY USED INTERVENTIONS

### ASSESSMENT (STEP 1)

Analyzed...  
Assessed needs for...  
Assessed available resources...  
Determined...  
Established need for...  
Gathered history...  
Gathered information...  
Identified needs...  
Re-Assessed needs for...  
Re-Assessed available resources...  
Reviewed...

### ACTIVITIES/ACTIONS (STEP 3)

Assisted client with...  
Coordinated linkage to...  
Coordinated placement...  
Discussed resource options...  
Educated about resources...  
Encouraged use of...  
Established communication between...  
Facilitated client linkage to referral...  
Implemented needs plan...  
Linked client to...  
Referred client to...

### PLAN DEVELOPMENT (STEP 2)

Approved plan...  
Clarified plan...  
Created plan...  
Determined if changes are needed to...  
Developed a plan for...  
Discussed planning...  
Established plan for...  
Explored plan options...  
Explored barriers in plan...  
Helped client redefine plan...  
Integrated client strengths into plan by...  
Modified plan...  
Monitored progress to plan...  
Planned for...  
Revised plan...  
Updated plan...

### MONITORING (STEP 4)

Adjust / Modify / rework plan...  
Arranged services with planned...  
Clarified progress of plan...  
Evaluated effectiveness of plan...  
Follow-up to ensure plan is appropriate...  
Gave feedback...  
Monitored the client's response with plan...  
Monitored adequacy of plan...  
Monitored adherence with the plan...  
Recommended...  
Reviewed...  
Summarized...  
Tracked plan progress...

### EXAMPLES

Established need for transportation to and from medical appointments.  
Established plan for dialysis as provider appointment requires rescheduling.  
Encouraged use of crutch for offloading of affected limb per provider order.  
Monitored adherence with the plan by reviewing pain-medication use for the past 24 hours.

## Case Management Intervention Guide

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# Case Management Cheat Sheet

**Clemens Wendtner**

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