

# Case Notes Review Tool: Generic

Please note what information is assessed and documented at caseworker visits.

**Casehead & Case ID:** Ezra Example, 3456123  
**County and Region:** Dane, Region1  
**Social Worker:** Sally Social Worker  
**Date of Contact being Reviewed:** 2/1/2020  
**Location of Contact:** Home Visit  
**Date of Review:** 3/1/2020

SAFETY	<b>Confirming safe environments</b> <i>(Did the worker confirm if the child(ren) were in a safe environment?)</i>
	Yes / No
SAFETY	<b>Impending Danger Threats – Safety Assessments/Planning</b> <i>(Did the worker assess impending danger threats / plan around safety as necessary? Note – it is still necessary to assess safety when the case is a ‘Safe’ case.)</i>
	Yes / No  General discussion about DV which was the safety threat.

CHILD DEVELOPMENT	<b>Education</b> <i>(Did the worker assess if the child(ren)’s education needs were being addressed, if the child(ren) is in school?)</i>
	Yes / No / Not Applicable  N/A - Child is an infant.
CHILD DEVELOPMENT	<b>General Development</b> <i>(Did the worker assess the child(ren) is engaging in developmentally appropriate activities?)</i>
	Yes / No  Talked about child beginning to walk.

CHILD DEVELOPMENT (continued)	<b>Physical Health</b> <i>(Did the worker assess the child(ren)'s physical health?)</i>
	Yes / No  Discussed child's recent seizure
	<b>Mental Health</b> <i>(Did the worker assess the child(ren)'s mental health, if age-appropriate?)</i>
	Yes / No / Not Applicable  N/A - child is an infant.

CASE PLANNING	<b>Case Plan</b> <i>(Did the worker assess for the service needs of all household members? Did the worker assess if the case is sufficiently progressing?)</i>	
	Service needs? Yes / No  Discussed evaluation and recommendations.	Progress? Yes / No  Discussed Dad's AODA and mental health.
	<b>Permanency Plan</b> <i>(Did the worker assess if the permanency plan (if applicable) is sufficient?)</i>	
	Yes / No / Not Applicable	
	<b>Visitation Plan</b> <i>(Did the worker assess if the visitation plan (if applicable) is sufficient?)</i>	
Yes / No / Not Applicable		