

Case Management Notes

Client information	
Name: Marcus Holbrook	Date of birth: 09/22/2988
Contact information: 555-0187, marcus.holbrook@email.com	
Emergency contact: Alicia Holbrook (sister), 555-0192	
Case information	
Case ID: CM-2024-0415	Date opened: 04/15/2024
Case manager: Tara Simmons, LCSW	
Purpose of visit:	
Initial assessment for substance abuse treatment referral	
Subjective	Objective
<ul style="list-style-type: none">- Client reports drinking "about a six-pack a day" for the past 3 years- States he wants to quit but has been unsuccessful on his own- Expresses concern about potential job loss due to decreased performance- Reports feelings of shame and isolation from family	<ul style="list-style-type: none">- Appears disheveled and fatigued- Slight hand tremors observed- Oriented to person, place, and time- BAC at time of visit: 0.06
Assessment	Plan
<ul style="list-style-type: none">- Alcohol Use Disorder, severe- At risk for alcohol withdrawal- Impaired social and occupational functioning- Motivated for treatment but lacks support system	<ol style="list-style-type: none">1. Refer to local intensive outpatient program (IOP) for alcohol abuse2. Provide information on local AA meetings and encourage attendance3. Conduct brief motivational interviewing to reinforce commitment to change4. Schedule follow-up appointment in 1 week to assess progress and address any barriers to treatment5. Provide crisis hotline number and educate on signs of severe withdrawal6. Explore possibility of involving sister as support person in treatment process

Example Case Management Notes

Michael Hoelscher



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