

Contact Notes

CATEGORIES	YOUR NOTES
Docket #	<i>Find this on Guardian Decree or Order. You will need to include it on any reports.</i>
Guardian Name	<i>You.</i>
Client Name	<i>Adult-with-guardian.</i>
Today's Date	<i>Date of this contact.</i>
People at this meeting or on this phone call.	<i>Name people you had contact with. Client? Family member? Provider? Caregiver? Please include names and relationships.</i>
Type of Contact	<i>In person (where)? By phone? Virtually?</i>
Purpose of Contact	<i>Why did you spend time with this person? What were you hoping to accomplish, learn or share?</i>
<u>Notes about this visit including conversations with client, observations or conversations with caregivers.</u>	<i>Describe what you observed, asked about, learned or accomplished during this contact.</i>
<u>Describe the client's current physical condition.</u>	<i>Include this information if you met with your client. This will help you keep written records you can use for reporting to the court.</i>

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Describe the client's current <u>mental condition</u>.	<i>Include this information if you met with your client. This will help you keep written records you can use for reporting to the court.</i>
Describe the client's current <u>social condition</u>.	<i>Include this information if you met with your client. This will help you keep written records you can use for reporting to the court.</i>
<u>Living arrangement</u> + your observations about living arrangement.	<i>Current address of client (how recently has this changed). Notate observations about the living situation so you can describe them to the court or a family member, if asked.</i>
<u>Decisions or changes</u> client has requested or agreed to.	<i>Sometimes things change. Describe changes if they have occurred or if they are about to happen.</i>

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Summary of <u>financial activities</u> during this period.	<i>Funds must not be comingled between client and any other person, including guardian. Document any gifts to the client including gift cards. If you have financial responsibilities, use this space to describe anything new or noteworthy that you will need to recall for your annual report.</i>
Notes	<i>Add anything else you want to remember or refer back to.</i>
Action Items	<i>List immediate action items here.</i>