



Helping the Community include Persons with Disabilities  
and Persons with Disabilities to be included  
by providing Education and Advocacy to Families

## Case Manager Checklist

*This checklist is designed to help families and individuals select case management providers. It intentionally does not give families specific questions or set expectations for case management; it is simply a tool to use when thinking about this important selection process:*

	Yes	No
Have phone calls been returned promptly?	<input type="checkbox"/>	<input type="checkbox"/>
Have appointments been kept?	<input type="checkbox"/>	<input type="checkbox"/>
Were appointments made at times convenient for you?	<input type="checkbox"/>	<input type="checkbox"/>
Did the people or person you met seem friendly?	<input type="checkbox"/>	<input type="checkbox"/>
Did they explain forms, terms, timelines, rules, definitions etc? in ways that made sense to you?	<input type="checkbox"/>	<input type="checkbox"/>
Did they facilitate gathering needed information?	<input type="checkbox"/>	<input type="checkbox"/>
Did they ask the "next" questions in order to get the detailed picture needed of the individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did they take the time to get to know the individual being served on a personal level?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have the opportunity to ask questions and were they answered?	<input type="checkbox"/>	<input type="checkbox"/>
Did you feel like you were treated with respect and dignity?	<input type="checkbox"/>	<input type="checkbox"/>
Did the prospective case manager communicate an attitude of confidence and competence?	<input type="checkbox"/>	<input type="checkbox"/>
Most importantly...did you like the person you met? Did you "feel good" after the meeting?	<input type="checkbox"/>	<input type="checkbox"/>

*This checklist is solely intended to be used by families/ individuals as a tool for analyzing case management interviews. All points listed are in direct relation to the person-centered philosophy and accepted "best practices."*

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