



## COMBINED MEDICAID 1506-1 Case Notes

**Supersedes:** FMA and MA 1507-1 (01/01/06)

**Reference:** ARM 37.82.101

**Overview:** Case notes are the legal record of the Department's actions, and contain additional explanations and clarifications of circumstances or actions that may be questionable or unclear. System case notes serve the following purposes:

1. Chronicle a series of events;
2. Summarize non-financial and financial eligibility requirements
3. Outline actions in cases of noncompliance;
4. List types and results of referrals; and
5. Document the family's progress in finding alternatives to public assistance; identify barriers to employment and how they were addressed. Identify and facilitate the family's access to services.

The client and/or their authorized representative may view their case record, including case notes. Certain information contained in case notes cannot be shared due to specific data source agreement. The eligibility staff member's personal opinions or judgments are not listed in case notes. Do not list a client's specific medical conditions in case notes unless the condition is a basis for eligibility, and then only general terms are used (e.g., blind, disabled).

**Effective Date:** July 01, 2016