# Differentiating Between Intake, Service Coordination and Case Records and Reports

## *The table below details the components of the three elements of case management: intake interviewing, service coordination, and case records and reports. Breaking down the case management process into these three areas can assist in making the complex process more manageable and intentional.*

|  |  |  |
| --- | --- | --- |
| Intake Interviewing | Case Records and Reports | Service Coordination |
| Determine if/how DS can help the student | Keep clear and comprehensive notes so that others have a clear understanding of the situation | Connect student with appropriate resources (tutoring, counseling, financial aid, state rehabilitation resources, etc.) |
| Identify student’s expectations of accommodation process | Update others involved in the student’s case where appropriate | Collaborate with other providers to facilitate a coordinated approach to support |
| Review background information from provided documentation, referral sources, etc. | Maintain privacy of client information | Monitor student’s progress |
| Request required information/documentation/evaluations | Maintain current case records |
| Review roles and responsibilities of student and DS provider |
| Share information about relevant resources |

*Table adapted from Roesseler et.al 2018*