



DEPARTMENT OF PUBLIC SAFETY & CORRECTIONAL SERVICES
SOCIAL WORK RELEASE PLANNING FILE CHECKLIST

Use this checklist to ensure that release planning files are completed and in order. Files are to be turned in to the supervisor within 30 days of release or closure of the case.

Name: _____ SID#: _____

Date Assigned: _____ Date of First Interview: _____

Closed Date: _____ Date File Submitted to Supervisor: _____

Items Present: (Items should be in this order.)

- Release Planning Case Assignment and Face Sheet
- Social Work Release Plan
- Progress/Contact Notes
- Case Correspondence (including initial referral)
- Completed Applications and Referral Forms
- Verification of SSI/SSDI Application
- Verification of Medicaid Application
- Social Work Assessment
- General Informed Consent for Social Work Services
- Social Work Department Release of Information
- Department Request and Authorization to Release Information
- Incarcerated Individual Requests/Correspondence

Are all OCMS notes completed? ☐ Yes ☐ No

Are all electronic health records notes completed? ☐ Yes ☐ No

Date Approved by Supervisor: _____ Supervisors Initials: _____

Comments: _____
