

Case Notes By Client

Acct Mgr: All
 Client Type: All
 Support Type: All
 User: All

Client Status: Active
 Case Notes: All
 Contact Type: All

Date Range: 01/01/2023 thru 12/31/2023

Client Name: Abbott, Lisa A

Contact Date	Unit	Contact Type	Urgent	Case Note	User ID
02/07/2023	1	Home Visit	Yes	Yearly home visit. Health seems fair. Will have legal advisor review accessibility standards for apartment buildings.	AdminUser
03/10/2023	0.5	Telephone		Called to schedule in-office meeting for 4/3/23 at 10:00 a.m. to review personal needs budget.	AdminUser
04/03/2023	1	Office Visit		Review personal needs budget. Client wishes to decrease personal needs budget and transfer more into personal savings account.	AdminUser
06/30/2023	1	Telephone	Yes	Did not receive food stamps in the mail for July. Requesting additional food allowance until situation is resolved.	AdminUser
10/19/2023	0.5	Telephone		Called to reschedule yearly in-office meeting to Dec 18 at 1:30 p.m.	AdminUser
11/06/2023	0.5	Telephone		Called to check balance for the remainder of the year to determine her Christmas present budget	AdminUser
12/20/2023	1	Office Visit		review updated annual budget for 2024	AdminUser
Total Units	5.5				