

Client Information

Name: Lisa A Abbott

Basic

Address 1	123 First Street	Phone	(502) 555-4567	Cell Phone	(502) 555-5678
Address 2	Apt. 2D				
City/St/Zip	Louisville	KY 40205	Birth Date	01/15/1945	
Client Type	Rep Payee		Support Type	Mass Accts	
Acct. Manager	Jane Doe		Status	Active	
			Add Date	12/01/2013	

Personal

Gender	Female	Email Address	lisaabbott@email.com		
Pronouns	She/her	Referral Source	Court		
Race	White	Referral Date	12/01/2013		
Ethnicity	Jewish	Term. Reason			
Marital Status	Single Parent	Term. Date			
Start Date	12/01/2013	Ward Number	1		
PN Amount	\$220.00	County District	A		
Medicaid Num.	123456789	Legislative District	0		
Medicare Num.	234567890	County	Jefferson		
Savings Acct.	No				

Housing

Date	Housing Type	Address	Notes
12/01/2013	Alone	321 Cherry Ln, Kansas City, AR 11234-5432	Limited wheelchair accessibility
01/01/2018	Family	45 Muffin Ave, Muffinville, MN 65678-0987	Home owned by daughter and son-in-law

Income

Income Source	Amount
SSA	\$782.00

Impairments

Impairment Type	Category
Dementia	Alzheimers

Events

Event Date	Type	Category	Notes	Complete
06/01/2018	Annual Report		moved in with family	Yes
06/01/2019	Annual Report			Yes
06/01/2020	Annual Report		Alzheimer's diagnosis - follow up with physician	Yes
06/01/2021	Annual Report			Yes
06/01/2022	Annual Report			Yes
06/01/2023	Annual Report		submitted 5/29/23	Yes
06/01/2024	Annual Report			

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Contacts

Contact Type	Contact Name/Email	Phone/Cell/Fax	Address	Notes
Emergency Contact	John Smith	P: (502) 555-1234 C: F:		
Physician	Dr. Jones	P: (812) 555-1245 C: F:	1210 Main Street, Louisville, KY 40202	

Custom

Admission date	02/15/2015
End of incarceration	
Medical emergency	11/22/2021
Medical procedure	12/02/2021
Email undeliverable	
Voicemail left	10/05/2023
Education level	High School
Career field	Hospitality
Dependent children	1
Pets	4+
Preferred communication method	Phone
Religion	Jewish
Title	Ms.
Mother's maiden name	Cohen
Foodstamps amount (\$)	254
Employer	Horseshoe Hotels & Casinos
Occupation	Catering Assistant
Financial goal	Save to purchase storage unit
Personal goal	Improve health & fitness
Cultural considerations	Does not shake hands with men