

## CASE NOTE GUIDANCE

### PURPOSE

The purpose of case notes are to capture engagement with participant; sequentially tracking participant’s progress, services provided and interactions. Likewise, it is a place for additional details of documentation on file.

Case notes are critical to the counselor’s role in being able to easily pick up where conversations left off. Alternatively, they are critical for anyone who would view the case notes – such as back-up and future counselors, monitoring staff & supervisors – to be able to view the case status, history and follow-up required. They serve an informative role.

Consider, when you return to the case note would you be able to easily resume engagement? Does it show the flow of activity with the participant? If you were to leave tomorrow would staff be able to understand the participant’s current status? Goals? Challenges? In essence, case noting is critical for successful customer service.

### CONTENT

<i>Clear</i>	Uncluttered, easy to follow, scan & understand, logical order
<i>Concise</i>	Purpose of the meeting, what was discussed, progress made since last contact, outcome of the meeting, next steps
<i>Complete</i>	Links discussion to the employment plan. Cumulative case notes show a continuous flow/tells a story, identifies contact attempts, meetings that occurred, resources provided, assessments completed, attendance, and time lines
<i>Objective</i>	Factual information (what you saw, what you heard and information that was provided), not personal opinions or assumptions

### WRITING TIPS

- ✓ Utilize strong verbs - advised, assessed, assisted, clarified, counseled, discussed, directed, encouraged, focused, identified, recommended, referred, reflected, summarized, supported.
- ✓ Use very few acronyms and abbreviations. If someone else was to read this, would they understand?

## BEST PRACTICES


- ✓ Complete as soon as possible after the event
- ✓ Spend approximately 10 minutes on a case note
- ✓ Be brief, lengthy case notes are difficult to follow
- ✓ Don't put everything in capital letters, it is difficult to read

## REMINDERS

- ✓ At a minimum, a monthly personal engagement case note is required
- ✓ While mass case notes can be utilized such as when sending resources, this isn't considered a monthly personal engagement
- ✓ Medical diagnoses and other confidential information about a participant's health should not be included in a case note. This information can be kept in the file, and the employment counselor can note there is a "medical condition" and where the documentation can be found if needed.
- ✓ Detailed information about family violence should not be included in a case note. This information can be kept in the file, and the employment counselor can note where the documentation can be found if needed.


## CASE NOTE EXAMPLE

Contacted participant to follow-up regarding completion of intake documents. Participant provided me with new email address. Updated this in WF1. We scheduled a phone meeting for tomorrow to complete the employment assessment. Participant agreed to have the intake documents completed prior to the meeting tomorrow.



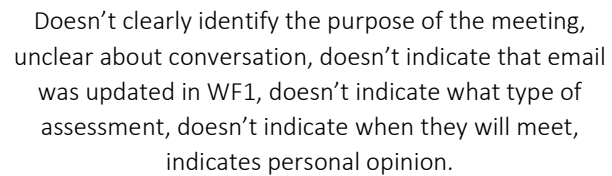
Purpose of the meeting. What was discussed. Outcome.  
Next steps. Easy to follow. Logical order. Factual.

Cntcd for INTKE docs. Recvd email. Assmt tmrw. INTKE docs tmrw.



Difficult to follow, abbreviations, unclear about conversation, didn't indicate that email was updated in WF1, doesn't indicate what type of assessment, doesn't clearly identify the outcome.

Contacted participant who provided a new email address. He needs to complete an assessment and intake documents. We will meet for this. Participant is slow so I hope these documents will be completed.



Doesn't clearly identify the purpose of the meeting, unclear about conversation, doesn't indicate that email was updated in WF1, doesn't indicate what type of assessment, doesn't indicate when they will meet, indicates personal opinion.

### **WF1 USER GUIDE – MFIP CASE NOTING**

The WF1 User Guide below is a resource for how to navigate entering a case note in Workforce One. Case note specific document is identified in the left hand column.

<https://www.ramseycounty.us/sites/default/files/Work%20with%20Ramsey/Workforce%20One%20User%20Guides%208.22.19.pdf>