

PURPOSE

The purpose of case notes is 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

- ✓ Case notes in relation to medical diagnoses and other confidential information about a participant's health should contain only the minimum information that is necessary. Rarely include an actual diagnosis, use general language and identify where documentation can be found. Ex. "Medical condition is present. See medical opinion form in EDS" or "Medical condition restricts activities. See medical opinion form in EDS".
- ✓ Detailed information about family violence should not be included in a case note. Use general language and identify where the documentation can be found. Ex. "Participant is requesting a family violence waiver" or "Received restraining order protection form. See document in EDS".

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](#) is a resource for how to navigate entering a case note in Workforce One.

The case note specific document is an identified in the left-hand column.

ADDITIONAL RESOURCE

MN Department of Human Services - [Guide to Effective Case Notes for Employment Services](#)