

Case Note Checklist

Required Fields

- Date of contact
- Type of contact
- Place of contact
- Purpose of contact
- Outcome of contact
- Next Step
- Name of staff person who wrote the case note

Did your case note.....

- Mention employment/career interests?
- Mention education issues?
- Mention housing issues?
- Discuss transportation?
- Discuss family as it pertains to the customer obtaining employment?
- Discuss health issues as it pertains to the customer not being able to obtain employment?
 - Did it avoid medical diagnosis?
- Mention childcare issues?
- Discuss supportive service/resources identified or recommended to the customer?
- Focus on behavior based observations?
- Clearly identify next steps?
- Clearly define customer goals?

Your case not should not include any of the following:

- Subjective language
- Be judgmental
- Proper names
- Criticisms of customers, agencies or staff
- Specific medical diagnosis
- Excessive acronyms
- All caps
- Been copied and pasted from another case note