

Case Notes

Indiana Department of Workforce Development
Case Management Training



Case Note 1

Customer contacted case manager to inform her that he obtained employment.

Case Note 2

10/15/11

Customer reported to the WOC. He has his HSD and can pass a DT and CBC. He met with his CM before being referred to take all three ICE assessments and TABE. After taking these assessments, he will speak with a ACC.

NEXT STEP: Meet with customer on 10/16.

Case Note 3

9/3/11

Lisa came into the WorkOne Center. Her clothes were wrinkled and she was definitely not prepared for her interview. She said that she had a rough morning. I told her that is no excuse, she knew about the interview for at least 2 weeks. **NEXT STEP:** Follow up with customer about the results of the interview.

Standards

CASE NOTE STANDARDS

Include all customer participation, activities, and events

Objective and behavior-based observations

Clearly written barriers and goals

Include all administrative steps

Update within 24 hours of contact

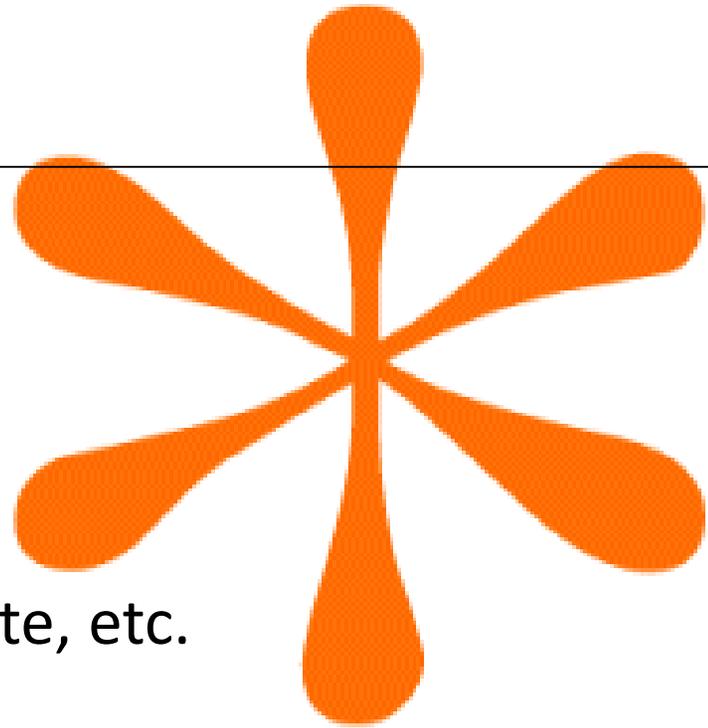
Include next step, staff name, and position

Written in full sentences with proper grammar

Only case note in the case management system

Required Fields...

- ✓ Date of contact
- ✓ Type of contact
- ✓ Place of contact
 - ✓ Employer, training site, private, etc.
- ✓ Purpose of contact
- ✓ Outcome of the contact
- ✓ Next Steps
- ✓ Name of the staff person who wrote the case note

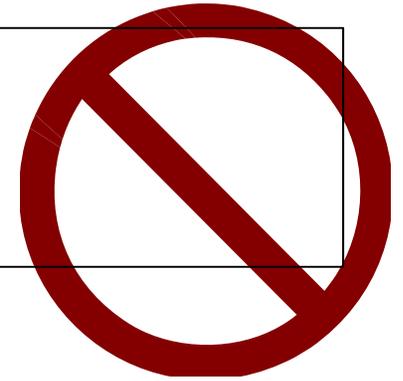


Key Issues to Address

- Employment/Career Interests
- Education
- Housing
- Transportation
- Family
- Health
- Childcare
- Supportive Services



Case Note Don'ts



- ✓ Do not use judgmental language
 - ✓ “I think...” “I feel...” “They should have...” “Customer was wrong...”
- ✓ Avoid using proper names
- ✓ Avoid criticisms of customers, agencies, or staff
- ✓ Refrain from including specific medical diagnosis
- ✓ Do not use clinical descriptions
- ✓ Avoid excessive acronyms
- ✓ DO NOT WRITE IN ALL CAPS
- ✓ Do not falsify records for any reason
- ✓ Do not include long strings of inappropriate/unrelated emails
- ✓ Do not use subjective language
 - ✓ “Client was drunk” vs. “Customer smelled of alcohol and was exhibiting slurred speech”

Practice time!

The next two slides contain case notes that do not follow the standards. Rewrite the case notes and identify areas where standards were not adhered to.

Case Note 4

Customer met with Case Manager in private room. Customer has clinical depression. He said he has been struggling with the issue for years. Customer also stated he has been using marijuana every day and occasionally uses other drugs to help deal with his stress. NEXT STEP: Refer customer to ACC for training options in the welding field.

RR-Case Manager

Case Note 5

4/3/11

Left message for customer. NEXT STEP: Wait for customer to call back. KH- Case Manager

7/15/11

Called customer. They stated everything is going well. They had a wonderful holiday with their family. NEXT STEP: Follow up with customer in 45 days. KH- Case Manager

Questions?

