

# **MAKE A NOTE OF IT!**

**“Documenting Progress  
Through  
Case Notes”**



**1500 Alpine Drive  
West Columbia SC 29169  
(803) 791-1558**

TITLE: "Make A Note Of It"

**DESCRIPTION:** Case managers all know the old saying, “If it isn’t documented, it didn’t happen!” What many don’t always understand is how true that really is. The customer is on a journey. It includes dreams, goals, services, and support. All roads lead to success. But it is up to the case manager to help write and tell the customer’s encounter with success. And that means documentation!

This workshop makes an important connection between case notes and related issues, such as planning, implementation, follow-up, and success! This is the training you have been looking for – a real, HOW-TO for writing case notes. You’ll get that and more – a few surprises – as you learn how to write a good case note!

**OBJECTIVES**      Upon completion of this workshop, participants will:

- Review the basics of documentation in a service-delivery environment.
- Discuss common problems with case notes.
- Identify the primary factor in writing a good case note.
- List the three standards for determining if a case note is good.
- Know the seven elements that should be present with every case note. Be able to explain them and use them.
- Practice with real case notes.

NOTES ...

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## **FORM A**

### **DOCUMENTATION BASICS ...**

#### **1. GENERAL.**

- a. In this discussion, we will focus on documentation.
- b. We have all heard the old saying, "If it is not documented, it did not happen." So it is appropriate to discuss documentation at this point.
- c. We will cover "how-to" implement activities later in this paper.

#### **2. FOUNDATIONS AND FUNCTIONS.**

- a. Record keeping is one of the three essential components of case management (case review, case documentation, and customer participation).
- b. Records are used for a variety of reasons.
  - 1) To document and retain information about the customer.
  - 2) To document and retain information about progress towards goals.
  - 3) To document and retain information about services customers receive.
- c. Individual records (case files) are used for a variety of purposes.
  - 1) To plan the services a customer will receive.
  - 2) To implement customer services.
  - 3) To evaluate the effectiveness of the services a customer receives.
- d. Record keeping is both a helping and an administrative function. Records are a focal point for accountability:
  - 1) To the customer/client.
  - 2) To the local area.
  - 3) To other helping agencies (partners).
- e. Case notes/records must be:
  - 1) Clear.
  - 2) Relevant.
  - 3) Useful.

#### **3. BASIC REQUIREMENTS FOR DOCUMENTATION.**

- a. Record keeping is a learned skill. It includes important professional judgments.
- b. Good record keeping involves a complex series of decisions.
  - 1) Choices about state/local policy and specific information for each case record/file/note.
  - 2) Choices are not always clear.
  - 3) Case managers must compare costs and benefits.
  - 4) Administrators must balance different principles (confidentiality and accountability).
- c. Good record keeping requires different skills:

- 1) Basic writing skills (spelling, grammar, punctuation, and sentence structure).
- 2) Explicit standards and procedures.
- 3) Organizational support (administrative support, time, and equipment).
- 4) Encouragement and development.

#### 4. PRINCIPLES OF RECORD KEEPING.

- a. There is no single best style of record keeping. There are actually a variety of acceptable types of styles available for making case notes and maintaining case records.
- b. Different styles are selected to highlight the special nature of each customer service transaction.
- c. In general, good record keeping (regardless of style) must address and adhere to the following:
  - 1) Focus – case notes/records should individualize differentiate the:
    - a) The person (customer).
    - b) The needs (of the customer).
    - c) The situation (the customer is facing).
    - d) The type(s) of services offered (to the customer).
  - 2) Scope – case notes/records seek to link goals, plans, and objectives to:
    - a) The assessment (problems, barriers, and assets).
    - b) The resources (availability and access).
  - 3) Purpose – case notes/records seek to demonstrate how delivery of services is tied to a change orientation (from unemployment to full employment).
  - 4) Functions – case notes/records seek to:
    - a) Document a process.
      - (1) Review (the customer and his/her situation).
      - (2) Select (appropriate items to include in the record).
      - (3) Analyze (carefully consider and discuss selected items).
      - (4) Organize (present them in a way that other helping professionals would recognize and be able to understand).
    - b) Develop a product (tell the customer's story).

#### 5. USES FOR RECORDS.

- a. There is a wide list of potential uses for case records. Below are just a few of them:
  - 1) Customer needs and problem identification.
  - 2) Service documentation.
  - 3) Monitoring and evaluation.
  - 4) Case reviews.

- 5) Administrative decision-making.
- 6) Case continuity (partner referrals).
- 7) Education and staff development.
- 8) Current trends and issues.
- b. The wide range of uses for case notes can complicate record keeping.
- c. Case managers face several challenges when deciding how to keep case notes/records:
  - 1) Scope of Information.
  - 2) Must put sufficient information in the record to support its purpose and functions.
  - 3) Must limit information so that record keeping will be time and cost effective.
- d. Personal Details.
  - 1) Must include sufficient personal detail in the record to form a reasonable basis for understanding the customer and making decisions about services.
  - 2) Must limit personal information so as to safeguard the customer's privacy.
- e. Use of Information.
  - 1) Must include sufficient information in the record to be useful to a wide, diverse audience (partners and helping agencies).
  - 2) Must limit information so that notes and records are not redundant or repetitious.
- f. Time.
  - 1) Must allocate sufficient time for case notes and record keeping.
  - 2) Must limit time spent on case notes and record keeping so that there is sufficient time for customer contact and interaction.
- 6. MAKING THE KEY DECISIONS.
  - a. Decision-making is an important part of record keeping for case managers.
  - b. Case managers continually encounter decisions and must have a basis for making good decisions about case notes and case records.
  - c. Diversity and decisions ...
    - 1) We serve a diverse population and case records/notes must be different/diverse.
    - 2) If all the case notes look and read the same, then there is probably not anything of substance in the case records.
    - 3) Because of the need for differentiation in case notes (customers are different so their records and histories will be different), case managers will face a series of choices when developing case records/notes.
  - d. Key choices ...
    - 1) Most choices that case managers make will center around:
      - a) Selecting items to be included in the case records/notes.
      - b) Deciding how to organize and present the case notes.
    - 2) The choices you make as a case manager will impact the quality of your case notes.

## FORM B

### COMMON PROBLEMS WITH CASE NOTES ...

#### 1. GENERAL.

- a. One of the big things we have seen in recent years is the problems that have surfaced as a result of using automated case management systems.
- b. Automated case management systems, in and of themselves, are potentially very powerful and very effective. They are only as good, however, as the people who designed the systems and programmed them on the back end.
- c. While automated systems have created some interesting new “issues” with case notes and documentation, in reality these problems most likely existed long before the systems were put into place. What has happened is that advances in technology have caused the problems to surface because it is easier to pull up case notes and look at them in conjunction with the “whole” of the case record.

#### 2. COMMON PROBLEMS.

- a. Below is a list of common problems we have seen nationally in the arena of writing case notes. Beware of them and take care that you do not get caught up in any of these yourself.

##### 1) Poor Case Note Titles or Subjects ...

- a) Issue: All case notes have the title “Case Note.”
  - (1) Of course, this says nothing.
  - (2) It is not very descriptive, and it certainly does not help anyone find a particular note (later when it is needed) in an automated system.
- b) Issue: All case notes have a date for the title.
  - (1) Again, this is not descriptive.
  - (2) Also, it is redundant (repetitious) since most automated systems are programmed to automatically generate a date whenever a case note is entered into the system.

##### 2) Personal “Stuff” That Doesn’t Belong ...

- a) Issue: Using case notes to advance personal arguments or disputes with other case managers or staff.
- b) Issue: Including personal information about customers that has little or no bearing on success in an employment or training program in the case notes.
  - (1) Had a fight with her husband because she was caught with her boyfriend in bar last night (blah blah blah).
  - (2) Going to see doctor for rash on his arm that looks like it may be getting infected.
  - (3) Caught by police last night with 20 pounds of cocaine in car. Will most likely exit program before completing training.

##### 3) Contradictions, Emptiness, or Repetitions ...

- #### 4) Opinions ...

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**FORM C**  
**THE PRIMARY FACTOR ...**

**1. GENERAL.**

- a. The single biggest factor in making decisions about case notes and records should always be the AUDIENCE.
  - (1) Who is most likely to read this record?
  - (2) Who else might read it?
  - (3) Who am I writing this case note for?
  - (4) Will the note(s) make sense to that person/group?
  - (5) Will the note(s) be relevant to that person/group?
  - (6) Will the case record answer all the main questions they might have?
- b. Always consider your audience when making a decision about what to include in a case record and how to document it.

**2. PRIMARY FACTOR.**

- a. The primary factor in writing a good case note is to stop writing for yourself and start writing for someone else.
- b. Know who is most likely to read the next case note you will write.
- c. Ask yourself if that person read it, would he or she understand it.
- d. Remember, if it could be misunderstood, it will be misunderstood. So be clear and straightforward.
- e. And also, ask yourself if that person would really understand what was going on with the customer after reading your case note.

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**FORM D**  
**THE STANDARDS FOR A GOOD CASE NOTE ...**

**1. GENERAL.**

- a. Have you ever written a case note only to have someone come along later and criticize it?
- b. Maybe they said it wasn't very clear. Or perhaps they said, "Something is missing!"
- c. Whatever the case, it can be a bit offensive to the case manager who is often overwhelmed with a huge case load and little time for unwarranted or unwanted criticism.
- d. But the truth is, there are good case notes, and there are bad case notes. Not everyone agrees all the time on what is good and what is bad, but in general, there are three universal standards for determining if a case note works or not.

**2. THE THREE STANDARDS.**

- a. The three standards for a good case note appear below. Remember them and use them as a test each time you write a case note.
- b. Standards:
  - (1) Clear – the person who is reading the case note (the primary factor) can understand this case note. Typically, that means it is written in the active voice with short, direct sentences. And it is specific in its content.
  - (2) Relevant – the case note has something to do with the case itself. That usually means, somewhere in the case note, there is a connection to the customer's goals and objectives, or to the services being rendered by the program or partnering programs. In other words, the case note has something directly to do with the case and the customer.
  - (3) Useful – the case note has a purpose. It contributes to the story, documenting what has happened and helping to explain how the services and resources are contributing to the overall success of the customer and performance of the program.

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## **FORM E**

### **THE IMPORTANCE OF STRUCTURE ...**

#### **1. GENERAL.**

- a. Case notes are hard! Seriously! Case notes are extremely difficult to write.
- b. Every time a case manager interviews a customer, the case manager must answer three questions (whether he or she realizes this or not) before the case manager can actually write a case note.
  - (1) Question #1: "Based on what just happened during the session with my customer, what should I put into the case note?"
    - (a) Obviously, you cannot write everything that happened and every word that was said.
    - (b) Some decisions must be made about what will go into the case note.
    - (c) Most organizations do not have clear guidance on the elements from an interview that should be included in the case note, and when this is left to the case manager, there is an important decision to be made every time.
  - (2) Question #2: "Based on what just happened during the session with my customer, what should I leave out or omit from the case note?"
    - (a) Again, you cannot put everything into the case note.
    - (b) Some things, like opinions for example, the case manager will exclude from the case note.
    - (c) But what else should be excluded? Again, having to make this decision each time the case manager writes a case note makes writing the case notes a very difficult task.
  - (3) Question #3: "How should I organize the case note so it tells a clear, relevant, and useful story about what is going on with the customer?"
    - (a) Most case managers are not great writers. Organizing the content of a case note can be a difficult challenge for many case managers.
    - (b) Having a structure – a system – can make all the difference in the world!

#### **2. STRUCTURE.**

- a. Having structure accomplishes three things:
  - (1) Requires the case manager to assume more responsibility for case records/notes.
  - (2) Encourages the case manager to better organize and plan.
  - (3) Emphasizes the purpose of the interview/intervention.
- b. The structure you will learn here is like a road map. It answers all three important questions and sets the stage for your future case notes to meet the three standards for a good case note in the eyes of the primary factor – the person who must read it.
- c. Learn this structure. Practice it. Use it. And deviate from it when you must but ...
- d. Do not deviate before you have learned how to use it. That's because it really does work just exactly like it is!

## **FORM F**

### **BRO CRIP” AS A STRUCTURE ...**

#### **1. GENERAL.**

- a. It's time for us to give you a structure. We call the structure “BRO CRIP” because those seven letters spell out the seven elements of a case note.
- b. When you use this structure, you know (before the customer ever walks into the room) the kind of information you will need to get from him or her. Having this structure helps you ask the questions you will need to ask in order to get at the information that should be in the case note.
- c. The “BRO CRIP” structure also answers the three questions a case manager must always answer before writing a case note.
  - (1) You put these seven things in your case note.
  - (2) If something is not part of these seven things, you omit or eliminate it from your case note.
  - (3) And you tell it exactly in the order it appears in the structure to ensure a clear, relevant, and useful story about the customer.
- d. In fact, we know of many case managers today who simply create a “BRO CRIP Cheat Sheet” and use it to “fill-in-the-blanks” every time they interview a customer. That makes writing future case notes as simple and easy as filling in the blanks, and then transferring that information to an automated case management system, if you are using one.

#### **2. BRO CRIP EXPLAINED.**

- a. B = Background Statement.
  - (1) The background is the customer's situation.
  - (2) It also includes the context, setting, conditions, circumstances, and framework around which the interview was scheduled.
  - (3) Anything that is already in the case record does not need to be repeated in a case note unless there is a local requirement to do so. However, the Background Statement is the place to introduce new “situational” issues that could impact a customer's potential success with training or employment.
  - (4) If nothing has changed on background for the customer (if the situation has not changed), there is NO REQUIREMENT to put a Background Statement in the case note. However, the case manager must always CONSIDER BACKGROUND upfront, in the beginning, with the customer every time they meet or talk.
- b. R = Reason Statement.
  - (1) This is the purpose, function, rationale, or intended usefulness of the interview.
  - (2) If you know “why” you met with your customer, be sure to tell the Primary Factor (remember ... the person who will be reading your case note) the reason for the meeting.
  - (3) If you are unsure about the reason, clarify it before meeting. A meeting with no reason or purpose is not likely to accomplish anything.
  - (4) And, by the way, don't confuse “frequency” with “purpose.”

- (a) You might be meeting with your customer every month, but “monthly meeting” is not the reason or purpose for getting together.
  - (b) In the planning you and the customer did together at the beginning, you should have established goals, objectives, services, milestones, and timelines.
  - (c) Your meetings should be in place, in large part, to validate that things are getting done the way they were planned – or that plans are being adjusted to reflect reality.
  - (d) Make sure your reason to meet has something to do with the customer’s plan for success.
  - (e) And when you know the reason, tell the reader (Primary Factor) by including a Reason Statement in every case note.
  - (f) Every case note should have a Reason Statement somewhere near the beginning of the note.
- c. O = Observations Statement.
- (1) Since no two customers are the same, if you are observing your customers and including an Observations Statement in your case notes, no two case notes will be exactly the same either.
  - (2) From the moment the customer enters the room, the case manager should be observing the customer.
  - (3) Use all your senses. Give yourself permission to look at the customer like a prospective employer might see him or her too.
  - (4) What do you notice that could impact success in a training program? In a job interview?
  - (5) Observations can be both good and bad. They are never opinions, however. There is no room for an opinion anywhere in a case note.
  - (6) Put differently, observations are always objective and never subjective.
    - (a) Subjective Observation: Customer had a bad attitude. (This is your opinion).
    - (b) Objective Observation: Customer was ten minutes late. (This is a fact).
  - (7) Since you are working in an employment or training program, your observations should always focus in on those things (patterns, habits, and approaches) that could positively or negatively impact a customer’s potential for success either in training or in procuring employment and accomplishing a personal goal.
  - (8) Every case note should have an Observation Statement in it.
- d. C = Content Statement.
- (1) The Content Statement of the case note is the substance of the meeting itself. It is a summary of the key events of the interview.
  - (2) Most case managers do an excellent job most of the time with content. In fact, most case notes we read seem to be almost exclusively content statements.
  - (3) When case managers learn to incorporate the other required elements (statements) in their case notes, they find that they do not have to be as elaborate as they have been in the past with content.

- (4) Think of the Content Statement as a brief summary – the gist – of what took place between the customer and the case manager during the session.
  - (5) Every case note should include a Content Statement.
- e. R = Results Statement.
- (1) The Results Statement is the outcome of the meeting. It is an evaluation of how well the meeting went, particularly in relation to the intended purpose of the meeting.
  - (2) In particular, the Results Statement explains whether the session with the customer accomplished its intended purpose (the Reason Statement).
  - (3) The more specifically the case manager understands the reason for the meeting, the more likely the case manager is to be able to make a clear and accurate Results Statement.
  - (4) Every case note should include a Results Statement.
- f. I = Impressions Statement.
- (1) This is perhaps the most misunderstood statement (element) of a case note.
  - (2) The Impressions Statement is an overall assessment of the progress the customer is making towards achieving or her program goals and objectives.
  - (3) It is directly connected to the planning the case manager did with the customer in the Initial Interview (IEP) phase of the case management process.
    - (a) The Short-Term Planning (STP) should have included goals, objectives, and services.
    - (b) To support the objectives, it should also have included some clear milestones with timelines attached.
  - (4) When the case manager and customer have done the kind of detail planning necessary for consistent customer success, both of them always know what should be going on in the customers journey at any given time.
  - (5) The Impressions Statement is NOT an opinion. It is based on the detailed planning that was done – or should have been done – with the customer on the front end.
  - (6) The Impressions Statement basically says, “based on the detailed planning done with this customer, the customer is ... on schedule ... ahead of schedule ... or behind schedule ... to achieve his or her goals.” You do not have to use that wording, but that is basically what the case manager is telling the Primary Factor with the Impressions Statement.
  - (7) Every case note should include an Impressions Statement.
- g. P = Plan Statement.
- (1) The Plan Statement tells what will happen next. It focuses on “the next steps.”
  - (2) A Plan Statement would include assignments given to the customer, as well as documentation of when the two will meet again, what the customer should bring to the next session, and anything else (such as coming dressed ready for a job interview, etc.).
  - (3) The Plan Statement is directly connected to the Immediate Planning (IP) that customers and case managers do together.

(4) Every case note should include a Plan Statement, and that Plan Statement can be very useful to the case manager in writing the Reason Statement for the next case note he or she writes at the end of the next session.

### 3. SUMMARY.

- a. Whenever we do this training, most case managers “freak out” at this point!
- b. “Ahhhhhhh!” they want to say. “I thought you were going to help me! But you just gave me a whole bunch of new requirements that I was not doing before.”
- c. “Well, calm down,” we like to respond. “The truth is, these always were requirements. Nobody just ever told you about them before.”
- d. When a case manager has a structure like “BRO CRIP,” the case manager know longer needs to wonder what to put in ... what to leave out ... or how to organize a case note so that it is always ... clear ... relevant ... and useful ... to the Primary Factor. Structure answers all those questions so that the case manager can just get busy filling in the blanks.
- e. And, in fact, that is exactly what “BRO CRIP” does for the case manager as a structure. It gives the case manager a case note template that enables the case manager to simply fill in the blanks whenever he or she is writing a case note.
- f. Try it. You will discover – many hundreds of other case managers have discovered too – that the BOR CRIP structure actually makes writing case notes faster and easier than ever before. And even if you are not innately a good writer, your case notes will improve almost immediately.

NOTES ...

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**FORM G**  
**“BRO CRIP” CHEAT SHEET ...**

**DIRECTIONS.** Use this form to capture all the important notes during your next session. Then transfer those notes into the case record or automated case management system. Case managers have permission to reproduce this sheet and use it locally.

**B** (Background – important documentation that is not already in the record)

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**R** (Reason – the main purpose for your meeting and what you hoped to achieve together)

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**O** (Observations – what you witnessed with your senses; what you saw; not your opinion)

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**C** (Content – a very brief summary of what happened during the meeting)

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**R** (Results – what you achieved or did not achieve in comparison to your “reason” to meet)

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**I** (Impressions – your professional assessment, based on planning, of the progress made)

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**P** (Plan – when you will meet again, the purpose, and what should happen next)

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## FORM H ABOUT THE FACILITATOR

Frank Lengel, PhD, CWDP

By his own admissions, Frank is “not playing with a full deck,” but he just might be one of the most unusual workforce or career development professionals you will ever meet. Frank has thirty years of experience as a professional cartoonist. His cartoons have been syndicated to newspapers all around the world and have appeared in almost every major magazine on the newsstand today. He has also been part of the gag writing team for one of the world’s longest running and most beloved comic strips.



Frank Lengel, PhD, CWDP

Frank is a popular speaker and keynoter at workforce conferences. His sessions are usually packed with humor and inspirations. He recently finished illustrating Dr. Earl Suttle’s new book, *Great Life Choices for Teens*. He is currently working on a graphic novel (super comic book) entitled *Layoff! A Funny Thing Happened On the Way To Retirement!* It will be available through Amazon.com and other major book distributors.

Frank is the co-founder of Lengel Vocational Services, with his wife Beth. And he is a veteran with service in both the Marine Corps and the Army special operations forces.

### CONTACT INFORMATION

To contact Frank, use the information below:

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## **PRACTICUM INFORMATION**

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|---------------------------------------------------------------------------|
| This section contains resources and aids to help in practicum activities. |
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NOTE: For case managers doing this training in a “face-to-face” session, we will do many of these activities together in groups.

NOTE: For case managers doing this training in a webinar session, we will use some of these case notes and use “polls” to identify missing “Statements” or elements from the case note, but we will probably not be able to practice writing revised case notes together.

NOTE: All of the case notes in these activities are REAL case notes. We copied these notes while consulting in local areas and programs around the country. We have changed the names and dates and locations so that they would not compromise any sensitive or private information. However, you should know, as you review them, that these were all real case notes ... entered into real case management systems ... by real case managers around the country. (No kidding!)

## CASE NOTE PRACTICAL EXERCISE A

Customer: Latonya Jackson

Case Manager: Joseph Onitnow

Date: April 19, 2006

Met with Latonya, still interested in pursuing a career in the medical field. Client want to attend the medical assisting program at Local Community College. Suggested she contact the employment specialist from Local Community College, regarding information on this course. In addition need to take the basic skills assessment and apply for financial aid. Latonya will keep me inform.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- |                                       |                                      |
|---------------------------------------|--------------------------------------|
| <input type="checkbox"/> Background   | <input type="checkbox"/> Results     |
| <input type="checkbox"/> Reason       | <input type="checkbox"/> Impressions |
| <input type="checkbox"/> Observations | <input type="checkbox"/> Plan        |
| <input type="checkbox"/> Content      |                                      |

REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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## CASE NOTE PRACTICAL EXERCISE B

Customer: Sylvester Udaman

Case Manager: Karen Introuble

Date: September 18, 2007

Subject: September follow up

Sylvester might still be in the area. From what we heard, he is in legal trouble. He is hard to get in touch with and we have been asking past members if they have seen him or heard from him.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- ☐ Background
- ☐ Reason
- ☐ Observations
- ☐ Content

- ☐ Results
- ☐ Impressions
- ☐ Plan

REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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### CASE NOTE PRACTICAL EXERCISE C

Customer: Sylvester Udaman

Case Manager: Karen Introuble

Date: July 19, 2007

Subject: July Follow Up

Sylvester might still be in the area. From what we heard, he might have another legal charge against him. His girlfriend, from last year, is said to have had another baby for him.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- ☐ Background
- ☐ Reason
- ☐ Observations
- ☐ Content

- ☐ Results
- ☐ Impressions
- ☐ Plan

REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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### CASE NOTE PRACTICAL EXERCISE D

Customer: Sylvester Udaman

Case Manager: Karen Introuble

Date: May 25, 2007

Subject: May follow up

Sylvester is still be in the area. From what we heard, he has another baby. It is extremely difficult to get in touch with him.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- ☐ Background
- ☐ Reason
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REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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## CASE NOTE PRACTICAL EXERCISE E

Customer: Lynhaven Myers

Case Manager: Wanda Wondas

Date: December 3, 2004

Lynhaven is receiving UI benefits, Military disability and food stamps from DHS—she is under medical attention and will return medical waiver.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- ☐ Background
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REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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## CASE NOTE PRACTICAL EXERCISE F

Customer: Felicia Fickendorkle  
Case Manager: Megan Smith, CWDP

Date: August 28, 2007

Felicia called earlier in the week. She is interested now in training and she is receiving food stamps. She has been looking for HR positions with no luck and is still interested in training for DBA. She does have IT experience from the military. Scheduled for eligibility on Sept. 13 at 10:00 am.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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### CASE NOTE PRACTICAL EXERCISE G

Customer: Lyman Toya  
Case Manager: Esolita Rodriguez, GCDF

Date: August 11, 2006

Subject: 28 day review

Met with Lyman today. He has not been feeling well for the last few weeks because of a sore arm. He continues to look for work but admits not as hard as he should be. He is thinking about possibly going to Local Community College which is going to continue to think about and contact the college for that possibility. Scheduled to meet again on Sept. 3 at 11:00.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- ☐ Background
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REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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## CASE NOTE PRACTICAL EXERCISE H

Customer: Lisa Wong  
Case Manager: Herbert Streetsmart, GCDF, CWDP  
Date: September 4, 2007

Lisa attended Info Session. She graduated from college in August, 2006 in Workforce Ed. and Dev from Local University. She is seeking employment. Scheduled to attend Fast Track Sept. 27 – 29 and will then work with an Employment Specialist for job search assistance.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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### CASE NOTE PRACTICAL EXERCISE I

Customer: Marisa Truelove  
Case Manager: Xavier Worthmore

Date: October 10, 2007

Subject: Training voucher

Marisa and I met today and completed a voucher for DBA training from Local Approved Trainer. She feels that this training will help her obtain employment that will help her once again achieve self sufficiency. Along with her military background in IT, this training will let her compete in IT jobs of today. She is scheduled to attend the training from 10-13-07 to 1-12-08.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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### CASE NOTE PRACTICAL EXERCISE J

Customer: Wilamena Meantoya  
Case Manager: Johnson Jones, M.Ed.

Date: November 9, 2007

Ms. Meantoya came in and completed the assessment in Math and Reading, scoring very high. She also completed the Countdown Interest survey. Her second highest score was in Business Leadership which jobs in IT fall under that. She has IT work experience and would like to further her education in that field with hopes of obtaining full time perm employment which she has not been able to do since May, 2007. She obtained a BS degree in 2006 but has not been able to find employment that lasts or that can keep her self sufficient. She is currently looking into possible training programs.

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### CASE NOTE PRACTICAL EXERCISE K

Customer: William A. Topkid  
Case Manager: Verona Stephenson, CWDP  
Date: September 18, 2007

Billy came in and was happy during the visit. He has had a good summer. He still takes medication, but hopes to get it reduced since he hasn't had seizures in a good while. He really wants to be able to get his drivers license. He says school is going good so far this year.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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## CASE NOTE PRACTICAL EXERCISE L

Customer: Shanika J. Wonderloss  
Case Manager: Mary Beth Knowsherstuff, CWDP  
Date: March 10, 2006

Shanika is a 16-year-old youth currently enrolled in the local school district. She no longer attends school the local high school and has been dropped by the alternative school also. Shanika is undisciplined. She has not paid good attention in any of our sessions together. Her mother thinks she has a learning disability. We will follow up on this question.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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## CASE NOTE PRACTICAL EXERCISE M

Customer: Sherry B. Goode  
Case Manager: David Axlerod, M.Ed.  
Date: December 19, 2005

Joan Hennigan, staff consultant for Local Community College, reported that Ms Goode complained of a toothache last month (11/22). Ms. Goode was sent to her dentist for an extraction. Ms. Hennigan reported that Ms. Goode will be required to make up for missed work before the semester exams, which are scheduled for 01/07/2006.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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## CASE NOTE PRACTICAL EXERCISE N

Customer: Mary Smith  
Case Manager: Jimmy Smartguy, GCDF, CWDP  
Date: July 12, 2004

Consultation with county personal care provider at county office regarding personal care services for customer, since she has had problems performing personal care. Her supervising nurse from the ABC Personal Care Agency will set up an appointment with the customer to do a health assessment within the next week. I plan to talk to her after this assessment to see if Ms Smith qualifies for personal care under WIA or will need a referral to a partnering agency.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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## CASE NOTE PRACTICAL EXERCISE O

Customer: Linda Everwhine  
Case Manager: Eureka Flatout, GCDF  
Date: April 10, 2002

Received voice mail message from Linda. She is nervous and upset. She may have been crying. She is going to visit the baby this morning.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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Customer: James Flimflam  
Case Manager: Robert Supportive, CWDP  
Date: February 19, 2007

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

- REVISED NOTE: Write a revised note that is based directly on the information above but includes all of the missing elements. Note that, since there is not actually a case file on hand for this customer, you will have to make some assumptions to complete this activity.

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## CASE NOTE PRACTICAL EXERCISE Q

Customer: Ariel Dippolito  
Case Manager: Kantanata Shimolika, GCDF  
Date: June 21, 2005

Met with Ariel after she attended this morning's workshop. She looked good and dressed well for the interview we are sending her on. She is a little nervous, so we talked about what she could expect when she got there. That really seemed to help her. She has re-written her resume, and we got her some extra copies. She was really glad that she got some extra bus tokens too .... that is helping her a lot. She checked to see the bus schedule for her interview. If she gets on first shift, she should be in good shape.

REVIEW CHECKLIST: Check the elements that ARE clearly present in this case note.

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