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April 18, 2024

Services & Case Note Training

Technical Check

Good Afternoon,

Please confirm that you can hear and see the screen by introducing yourself in the chat box.

Your lines are muted. Please enter questions in the chat box and we will answer.

Presenters

Kristi Chevali

Manager of Delegate Agency Technical Assistance & Support

Carlos Valentin

Program Coordinator, Region 1

Nichole Morrison

Program Coordinator, Region 2

Danny Marshall

Program Coordinator, Region 3

Tina Caldwell

Program Coordinator, Region 4

Objectives



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- Review Service Matrix: Where can you find it?
- Identify Categories & Types of services
- How to use the Matrix for daily activities
- Review Case Note Guide: Where can you find it?
- Explain the standards of a good case notes
- Customer Engagement
- Provide examples of Case Notes vs Services
- Q & A



What is the Service Matrix?



- A document that houses all services and definitions available for use under WIOA guidance.
- A reference tool for clear, concise up to date service information
- Separated by different categories of services:
 - ✓ Adult & Dislocated Worker Career
 - ✓ Adult & Dislocated Worker Training
 - ✓ Youth Program Elements
 - ✓ Supportive Services
 - ✓ Follow Up



Service Matrix

- The Service Matrix can be found on the Help Desk: <https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>
 - ✓ Each tab is color coded by Category of service
 - ✓ Extends 90-day Exit Window is related to 90-Day Exit rule compliance
 - ✓ Pre-Requisite column indicates what rules apply to each service
 - ✓ Performance Measure column includes all applicable measures

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connector alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
205	Development of an IEP (Same Day Service)	Yes	Yes	The Individual Employment Plan (IEP) is jointly developed by the participant and career planner. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment and career goals, including providing information on eligible providers of training services and career pathways to attain career objectives. The IEP is the basic instrument for the LWIAs to document the appropriateness of the decisions made about the combination of services for the participant, including referrals to other programs for specified activities.	Completed Assessment	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Adult & DW Career Services

Adult & DW Training Services

Youth Services

Supportive Services (SS)

Follow-Up Services

Five Categories of Services



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1. Basic Career Staff Assisted

2. Individualized Career

3. Training

4. Supportive

5. Follow-Up

Three Types of Services



Within the 5 Categories of services there are three general Types of services.

1. **Enrollment Services**

- Triggers participation
 - Makes the individual a WIOA Participant (registrant)
 - Service record extends participation by resetting the clock on the “90-Day Rule” for exit.
- Extends 90 Day Exit Window
 - Each additional enrollment service begins a new 90-Day window to program exit date
 - Extends participation period and exit
 - Related to 90-Day Exit rule compliance
 - Column on Matrix – “Extends 90-Day Exit Window”

Please Note

An Enrollment service is required (at minimum) once every 90 days

Types of Services continued



2. *Non-Enrollment Services and Activities*

- Services or activities that continue supporting the education or employment plan, but don't trigger participation or extend the exit date.
 - Non-Enrolling Tracking Services
 - ✓ Some are unique to Career Connect
 - ✓ These services are used to transmit & track data across systems and are not considered true services.

3. *Same-Day Services*

- Staff-assisted services and activities that are completed in one day
- The service or activity start and end on the “same day.”
- Service **cannot** be left open.
- Case notes are **required** for all Same-Day services.



Basic Career Staff Assisted: *Definition*



➤ Basic Career Staff Assisted: Definition

- Services that prompt enrollment in WIOA and are provided with significant staff assistance.
- Include services such as eligibility, initial skill assessments, labor exchange services, provision of information on program and services and program referrals.
- Services can include:
 - ✓ Referred to Employment/Placement
 - ✓ Job Search Activities and Assistance
 - ✓ Shared Placement
 - ✓ UI Filing Information
 - ✓ FAFSA/Financial Aid Eligibility Assistance
 - ✓ See Service Matrix for full list



Basic Career Staff Assisted: *Rules*

➤ Basic Career Staff Assisted: Rules

- They are all Same-day services
- Once opened the participant will fall into WIOA Performance
- They can be opened at any time throughout program participation

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requirement	WIOA Performance Measure(s) ³
Basic Career Services (Staff Assisted)						
210	Referred to Employment/Placement Assistance (STAFF Assisted)-Same Day Service	Yes	Yes	Individualized assistance by a career planner who matches a participant with existing job openings which are related to the customer's prior job experience, career goals and occupational interests, or with the training program the individual has completed.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
211	Job Search Activities and Assistance (STAFF Assisted)-Same Day Service	Yes	Yes	Activity in which the Career Planner assists customers in a one-on-one setting in the job search process including locating relevant job openings, resume writing, and setting up interviews with potential employers.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
232	Shared Placement Service (Same Day Service)	Yes	Yes	A shared placement occurs when one agency places another agency's WIOA participant in a job. By adding this service both the owning/case managing agency and the agency that does the job placement get credit for the placement. Only enter a Shared Placement service when: --the participant has actually been placed in a job and employment is verified, and --the participant was placed by your agency or center, but is receiving WIOA career coaching from another Partnership-funded WIOA agency. For more information see the Shared Placement procedure on the Career Connect Help Desk. Note: This service transfers to IWDS as "Referred to Employment/Placement Assistance"	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
239	UI Filing Information (STAFF ASSISTED)-Same Day Service	Yes	Yes	Provision of information and assistance regarding filing claims for unemployment compensation, by which the one-stop must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
240	FASFA/Financial Aid Eligibility Assistance (STAFF ASSISTED)-Same Day Service	Yes	Yes	Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Individualized Career Services *Definition*



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➤ Individualized Career Services: Definition

- Must be provided to participants after Agency staff determine that such services are required to retain or obtain employment.
- Generally, these services involve significant staff time and *customization to each individual's need*.
- Services can include:
 - ✓ Specialized Assessments
 - ✓ Development of an IEP/ISS
 - ✓ Career Exploration
 - ✓ Workforce Preparation Activities
 - ✓ Job Readiness Training
 - ✓ Job Club
 - ✓ See Service Matrix for full list



Individualized Career Services *Rules*

➤ Individualized Career Services: Rules

- Before entering some of these services an IEP must have been created with participant **and** the 205-Develop IEP Service **must** be entered. The requirements for each service are listed in the Pre-Requisite column of the matrix.
- Must be identified in the Individual Employment Plan (IEP)
- Some are Same-Day; some may be left open
- Once entered the participant will fall into WIOA Performance

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	WIOA Performance Measure(s) ³
201	Group Workforce Research/Workshops/Job Clubs (Same Day Service)	Yes	Yes	Workshops - Facilitator-led, organized workshop intended to provide participants with knowledge of labor market information, skills assessment, applications/resume preparation, interviewing techniques, and job search techniques to enhance their search for employment. Job Clubs - Provide resource materials on job openings and job search skills as well as descriptive materials about vocations and the skills sets that are required to successfully gain employment. They may also provide group activities which support customers in conducting an independent job search.	Must Have IEP (Activity Code 205) before entering this activity.	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
202	Career Planning (Case Management)- Same Day Service	Yes	Yes	WIOA Section 3(8) defines career planning as the provision of a client-centered approach in the delivery of services, designed to prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary workforce investment activities and supportive services, using, where feasible, computer-based technologies; and to provide job, education, and career counseling during program participation and after job placement. Career planners are to provide one-on-one staff assistance and career counseling. These activities are to assess the areas in which WIOA participants have the greatest needs and assist them in determining whether or not their existing skills are in demand in the local economy. If marketable skills are found to exist, the client should be directed to activities which assist him/her in obtaining job search skills or locating potential employment opportunities. If marketable skills do not exist, the client should receive information about skills which are in demand, the training needed to obtain employment in these occupations, and training assistance which can be provided by the WIOA program.	N/A	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)
205	Development of an IEP (Same Day Service)	Yes	Yes	The Individual Employment Plan (IEP) is jointly developed by the participant and career planner. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment and career goals, including providing information on eligible providers of training services and career pathways to attain career objectives. The IEP is the basic instrument for the LWIAs to document the appropriateness of the decisions made about the combination of services for the participant, including referrals to other programs for specified activities.	Completed Assessment	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER)

Non-Enrolling Tracking Services

- The services listed below are used to transmit & track data across systems and are not considered true services.
 - Unique to Career Connect
 - ✓ Co-Enrolled in IWDS (Check IWDS Before Closing / Exiting)
 - ✓ Adult Initial ITA Request (Same Day Service)
 - ✓ DW Initial ITA Request (Same Day Service)
 - ✓ Adult ITA Exception (Same Day Service)
 - ✓ DW ITA Exception (Same Day Service)

Adult & Dislocated Worker Career Services - 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	English	Pre-Requisite	WIOA Performance Measure(s) ³
Non-Enrolling Tracking Services (these are not true services, but are used to transmit & track data across systems).						
226	Co-enrolled in IWDS (Check IWDS Before Closing / Exiting)	No	No	Use this service to indicate that a customer is co-enrolled in a statewide program or TAA in IWDS. The service start date should equal the co-enrollment registration date. The service end date should equal the Exit date. See the Co-enrollment Procedure on the Help Desk for full procedures on when to co-enroll and how to track co-enrollment (https://workforceboard.zendesk.com/hc/en-us/articles/115003924311).	A. Must Have IEP (Activity Code 205) before entering this activity.	N/A
231	Adult Initial ITA Request (Same Day Service)	No	Yes	Use this service to initiate the ITA process when ITAs are open for the Adult customer group. The service will trigger a data transfer to the Bright Horizons EdAssist System (BHES), and you will be able to complete the ITA Application in BHES the next business day. <i>Note: This service does not transmit to IWDS.</i>	Completed Assessment IEP (Activity Code 205)	N/A
235	DW Initial ITA Request (Same Day Service)	No	Yes	Use this service to initiate the ITA process when ITAs are open for the Dislocated Worker (DW) customer group. The service will trigger a data transfer to the Bright Horizons EdAssist System (BHES), and you will be able to complete the ITA Application in BHES the next business day. <i>Note: This service does not transmit to IWDS.</i>	Completed Assessment IEP (Activity Code 205)	N/A

Training Services *Definition*



➤ Training Services: Definition

- Training services, when determined appropriate, must be provided either through an Individual Training Account (ITA) or through a training contract.
 - ✓ IEP/ISS must be in place
 - ✓ Career Exploration must have taken place
 - ✓ Participants must have completed research on 2 or more approved schools
 - ✓ Please see our ITA Policies & Procedures on the Help Desk for specific guidance <https://workforceboard.zendesk.com/hc/en-us/articles/360020502172->
- **On-the-Job Training (OJT):**
 - ✓ Must have an IEP/ISS
 - ✓ Must have an ISTEP
 - ✓ See our OJT Policy on our Help Desk <https://workforceboard.zendesk.com/hc/en-us/articles/115001817051>
 - ✓ See special instructions for entering the OJT services correctly, including the planned wage: <https://workforceboard.zendesk.com/hc/en-us/articles/4424187557261>

Training Services *Rules*



➤ Training Services: Rules

- All Training Services require the following to be completed **before** a Training service can be entered:
 - ✓ IEP/ISS service
 - ✓ Training Certification (WIOA Application State Specific Tab for Adults & Dislocated only)
 - ✓ Tests (on the EFL for MSG bar) where applicable
- **Performance Measures (non-OJT)**
 - ✓ Credential Measure & Measurable Skill Gains
 - ✓ ALL successful training program completions should result in a post-secondary Credential & MSG.
- **Rules & Performance Measures for OJT**
 - ✓ Require the IEP/ISS **and** the ISTEP services to be entered before the OJT service can be entered.
 - ✓ Measurable Skill Gains
 - ✓ ALL successful OJT's should result in an MSG but **not a Credential**

Training Services Rules



➤ Training Services: Rules (cont.)

- Training services are NOT Same-Day services
 - ✓ When these services are opened, they should remain open until it is confirmed the participant has completed.
- End Date AND Completion Statuses
 - ✓ **Successful** = Record when participant completes the service or training.
 - ✓ **Unsuccessful** = Record when the participant withdrew or did not complete the service or training program

Adult & Dislocated Worker Training Services 2/24/2023						
The services appear in the Career Connect alphabetically by Activity Title.						
Activity Code	Activity Title	Extends 90-day Exit Window ¹	Same Day Service ²	Definition	Pre-Requisite	Performance Measures ³
300	Occupational Skills Training (ITA)	Yes	No	<p>Make sure to set the Career Connect "Is this Service Paid by an ITA" to "Yes" when this service is ITA-funded.</p> <p>An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Such training must be specified in the participants Individual Employment Plan (IEP) and be of sufficient duration to impart needed skills and lead to a recognized postsecondary credential. Such programs should be outcome orientated and focused on an occupational goal specified in the IEP. Training program must be on the Illinois ETPL.</p>	Must have IEP (Activity Code 205) before entering this activity.	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER) MSG & Credential (AMSG/DMSG ACAR/DCAR)
301	On-The-Job Training (OJT) - Private Sector	Yes	No	<p>See the OJT Service Procedure on the Help Desk for detailed instructions of how to enter the OJT service, including the planned wages: https://workforceboard.zendesk.com/hc/en-us/articles/4424187557261</p> <p>OJT is provided under a contract with an employer or registered apprenticeship program sponsor in the private non-profit or private sector. Through the OJT contract, occupational training is provided for the WIOA participant in exchange for the reimbursement, typically up to 50 percent of the wage rate of the participant, for the extraordinary costs of providing the training and supervision related to the training. LWIAs must consider skill requirements of the occupation, participant's academic and occupational skill, work experience and the IEP. An OJT contract must be limited to the period of time required for participant to become proficient in the training related occupation.</p> <p>Do NOT record an OJT service if provided as part of an Apprenticeship Program or Pre-Apprenticeship Program. Instead record as the appropriate apprenticeship/pre-apprenticeship service code and follow the instructions for that service to indicate that it's an OJT.</p>	Must have IEP (Activity Code 205) before entering this activity. Must have Completed ISTEP (Activity Code 221) before entering this activity.	Employment Measures (AER2/DER2 AER4/DER4 AMER/DMER) MSG (AMSG/DMSG)

Training Services



- Training Services can include:
 - ✓ On-the-Job Training (OJT) – Private Sector
 - ✓ On-the-Job Training (OJT) – Public Sector
 - ✓ Occupational Skills Training
 - ✓ Career Pathway Training
 - ✓ These services will appear in Career Connect under the Training Service Activity Level services
 - ✓ Please see Service Matrix for complete list

Grant:

WIOA or Non-WIOA Partner Program: Yes, service is a WIOA or Non-WIOA Partner Program.

*** Service Activity Level:**

*** Activity Code:**

*** An actual begin date or a projected begin date is required.**

Projected Begin Date: (mm/dd/yyyy) [Today](#)

Actual Begin Date: (mm/dd/yyyy) [Today](#)

Supportive Services *Definition*



➤ Supportive Services:

- Services necessary to enable an individual to successfully participant in WIOA career and training services.
 - ✓ Must be in support of a WIOA career or training service
 - ✓ Must be documented in IEP/ISS and recorded in Career Connect
 - ✓ Non-Enrolling Activity: Does not trigger enrollment or re-set 90-Day Exit clock
 - ✓ An enrollment service being provided on the same day as a supportive services should be documented **first** then the supportive service record can be added.
 - ✓ Supportive services are all Same-Day services and cannot be left open.
 - ✓ A case note must be entered to justify the need.

Please Note

Adult/Dislocated participants are not eligible for supportive services during follow up

Supportive Services



➤ Supportive Services can include:

- ✓ Child/Dependent Care
- ✓ Transportation
- ✓ Tools/Equipment
- ✓ Uniforms
- ✓ Legal Aid
- ✓ Other Supportive Services

Supportive Services - Adult, Dislocated Worker & Youth - 2/24/2023				
Supportive Services: Must have a least one active, enrolling service before opening any supportive service.				
Adult/DW Activity Code	Activity Title	Extends 90-day exit Window ¹	Same Day Service ²	Definition
180	Support Service - Child/Dependent Care (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or their retention of a job gained through WIOA participation by ensuring that children or other dependents of the customer are properly cared for during the period of time a customer is in training or at work. Assistance may include child/adult day care or after school programs which are in-home or outside the home. Childcare usually includes supervision and shelter and may include meals and transportation.
181	Support Service - Transportation Assistance (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or retention of a job gained through WIOA participation by ensuring that he or she has the ability to make the trip from his or her residence to the training or employment site (and childcare site, if necessary) and back. Assistance may include the cost of public transportation or mileage reimbursement if the customer is using his or her vehicle for transportation purposes.
182	Support Service - Medical (Same Day Service)	No	Yes	Services provided to a customer to permit his/her participation in a WIOA-funded career service or training program or retain employment that was gained through WIOA participation by ensuring that needed health services are made available. Health care services may include, but are not limited to: a) Physical examination required for participation in training or as a condition of employment; b) Provision of eyeglasses; c) Essential dental services; d) Reasonable accommodations for individuals with disabilities; and e) Other essential health care that is required by the program.

Order of Services



- **Adult & Dislocated:** There is no required sequence or order for Adult/Dislocated Worker services. However, we have a suggested order of services.
 - ✓ 207 Comprehensive and Specialized Assessments (OAS)
 - ✓ 224: Career Exploration
 - ✓ 205 Develop IEP

- **Youth:** There is a required sequence/order for Youth services.
 - ✓ 468: Comprehensive and Specialized Assessments (OAS)
 - ✓ 469: Develop IEP/ISS
 - ✓ 470: Career Planning

Please refer to our *Career Coaching: Customer Flow Webinar Series* on our Help Desk. <https://workforceboard.zendesk.com/hc/en-us/articles/360060897212->

What is the Case Note Guide?

- A document that provides guidance on how to label and organize case notes
- A reference tool for clear, concise up to date case note information
- Provides a Guide to
 - Subject Lines
 - Case Note Descriptions
 - Should be driven by the IEP/ISS
- **Case Note Guide:** <https://workforceboard.zendesk.com/hc/en-us/articles/360058453731->

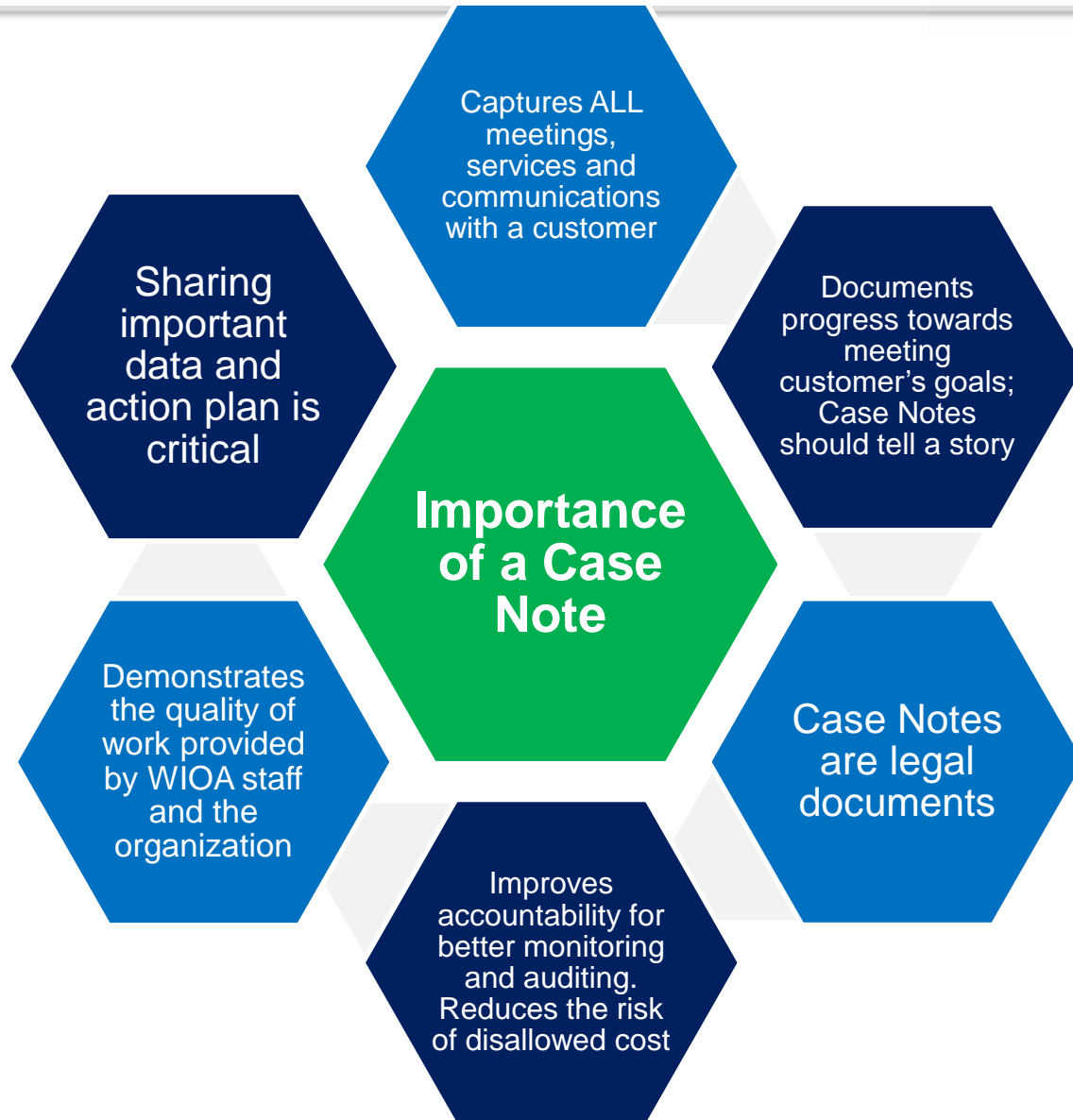


What is a Case Note?



- Case notes are the chronological records of interactions, observations and actions involving a WIOA participant
- Case Notes “tell the story” of the participant’s experience
- Case Notes provide a record of all the things that happened with a participant during their participation under the WIOA program including Follow-Up
- Case Notes are used to document ALL services provided

The Importance of Case Notes



Case Notes: Timely, Concise, Accurate



- Required every 30 days, two-way conversation
- Recorded in a **TIMELY** manner (ideally within 24 hours)
- Clear and well-written (watch for typos or grammatical errors)
- Accurate, concise and complete
- Objective and impartial
- Should contain **Who, What, Where, When, Why & How**

Case Note: Program Accountability



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- Career Coach leaves the Agency, and a new Career Coach takes over the case
- Other Agencies or LWIAs need to access case records when working with the same participant
- Case notes provide a step-by-step outline of participant's progress and achievements
- For supporting and documenting the delivery of services to a participant (ISS/IEP)
- The Partnership needs information for monitoring purposes or handling complaints
- A participant's records may be subpoenaed by the court system

Case Note: Standardizing and Organizing



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Include:

- Service Name
- The Who, What, Where, When, Why and How
- Behaviors reported by the participant, partner agencies and/or training providers
- Factual Observations
- Next steps



Case Note: Standardizing and Organizing



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Do NOT include:

- Personal opinions, stereotypical comments, or any offensive statement
- Personal health details
- **Acronyms, abbreviations, jargon or slang**
- Unqualified statement
- Do not copy & paste emails into case notes
- Do not repeat content in multiple case notes (use Case Note Guide for reference)



Who?



Name of person(s) involved in meeting, phone call, incident, event, email, etc.

- Participant
- Family members
- External providers or employers
- Agency staff
 - ✓ Career Coach
 - ✓ Business Service Rep./Job Developer
 - ✓ Intake Specialist
 - ✓ Other authorized personnel that may have witnessed, or have knowledge of the case

Please Note

Refer to yourself as third-person in notes, do not use “I”

What?



What was the purpose of the meeting, event or situation

- Keep it relevant to IEP/ISS
 - IEP/ISS goal
 - IEP/ISS objective(s)

What was discussed

- Summarize the main points
- Include quotes when:
 - Relevant to participant's progress
 - Accurately recording what was said

What was done or not done

- **Justify the reason(s) for delivery of service**
- Find out what happened
- What should have happened



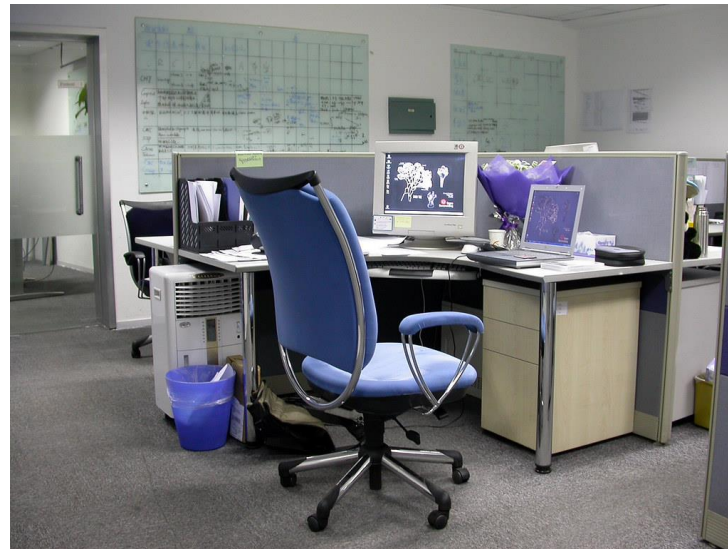
Where?



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- **Where** did the contact, meeting, event or situation occur or will occur?
- Name of meeting place(s)
- Include location(s) (addresses, cities, neighborhood communities, etc.)



When?



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When should staff case note in Career Connect?

- Program Eligibility
- Assessments completed
- IEP/ISS including any updates
- Job Search assistance
- ITA services
- Supportive services provided
- Other Services
- On-the-Job Training (OJT)
- Work based learning (WBL) services
- Placement
- Exit
- Follow Up
- Any other participant updates, progress

Also include:

- When did the contact, meeting, event and/or situation occur?
- Date and times
- When is follow up scheduled?



Why?



- **Why** did the contact occur?
- **Why** is the event significant to participant's case?
- **Why** is the service(s) being provided?
 - Is it related to an objective and goal?
 - Is it related to our WIOA policies and guidelines?

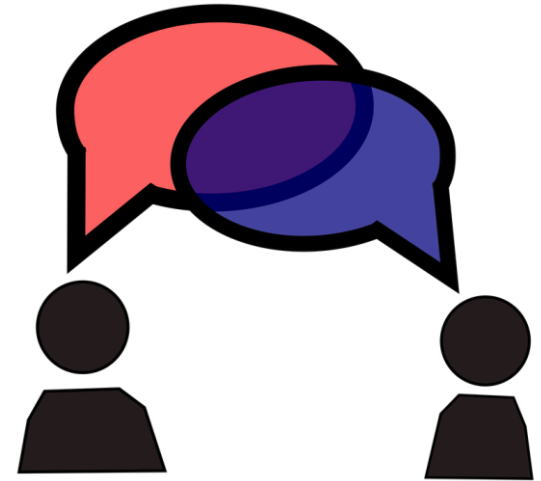


How?



➤ **How** was the contact made?

- In-person
- Virtual
- Phone call
- Email
- Text
- Other



➤ **How** did you address the situation?

➤ **How** did you resolve the problem?

➤ **How** will you monitor the situation?

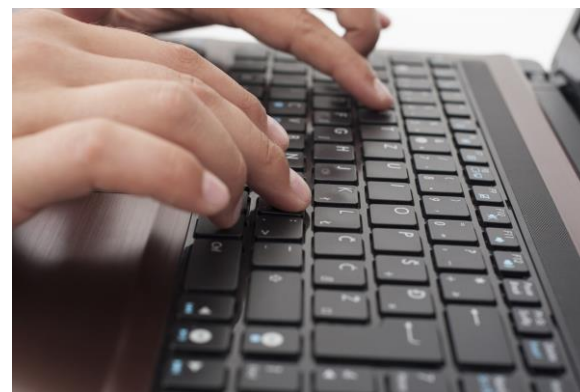
Case Note Tips



- Review last case note entry before meeting with participant
- **Create a sustainable schedule for entering case notes**
- **Best time is right then and there**
- **If you need to catch up**
 - How long does it take you to write a note?
 - Identify the best time to write your notes
 - Put it on your calendar and commit

Please Note

Case notes are important for accountability to all our customers – the participant/customer, internal Agency staff, employer, funders and/or partnering organizations



Power of Engagement



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- How are we keeping customers engaged?
- Does your agency have a customer engagement plan?
 - Try and create a plan for an ongoing positive experience that keeps participants coming back
- Case notes are the heart of documentation for our industry but keeping our participants engaged is **CRUCIAL**.



The Key is Engagement



Passive or Active Engagement

- **Passive engagement** is, in its simplest form, having something done to you
- OR
- **Active engagement** can be articulated by encouraging participants to get involved, by showing them how to do something and walking alongside them through the experience.

Career Coach

1. Know your case load
2. What works best for your participant?
3. Review last case note and IEP/ISS before engagement
4. Consider the questions you ask – open or closed questions?

Center/Agency

1. Training with staff on scenarios and how they are case noted
2. Use Career Connect training site for interactive training experience
3. Supervisor or QC staff conduct case note samples and use Career Connect case note report

Activity



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Example 1



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Case Note: Career Coach spoke to customer to discuss employment assistance. Customer stated that he is currently looking for employment. Career Coach instructed the customer to email a copy of his resume for review and the customer agreed. The Career Coach is awaiting a response.

Is this a Service?

If yes, what service?

Answer



Case Note: Career Coach spoke to customer to discuss employment assistance. Customer stated that he is currently looking for employment. Career Coach instructed the customer to email a copy of his resume for review and the customer agreed. The Career Coach is awaiting a response.

No, case note only

No action has taken place between customer or coach. This was just an exchange of information

Example 2



Case Note: The Career Coach advised the customer to complete the Work Interest and Career Ladder explorations on Career Connect. The customer obtained the highest score in the Conventional area which means he likes to follow procedures and routines. He prefers to pay attention to detail versus working with ideas. The Career Ladder exploration showed the customer that there were a lot of opportunities for truck drivers. He printed the job requirements/skills that are included on the resumes of individuals in this career. Lastly, the median wage for truck drivers is \$47,453 according to the Career Ladder in Career Connect.

Is this a Service?

If yes, what service?

Answer



Case Note: The Career Coach advised the customer to complete the Work Interest and Career Ladder explorations on Career Connect. The customer obtained the highest score in the Conventional area which means he likes to follow procedures and routines. He prefers to pay attention to detail versus working with ideas. The Career Ladder exploration showed the customer that there were a lot of opportunities for truck drivers. He printed the job requirements/skills that are included on the resumes of individuals in this career. Lastly, the median wage for truck drivers is \$47,453 according to the Career Ladder in Career Connect

Yes

**Career Exploration (A & D)
Vocational Exploration (Youth)**

Example 4



Case Note: Customer called Case Manager. He stated he just passed his test yesterday and received his CDL License. Customer asked if Case Manager has any job leads for him since his unemployment will be running out very soon. Case Manager states she will email customer job openings. Customer emails Case Manager back later that day thanking Case Manager for the email and states he has applied for two of the positions.

Is this a Service?

If yes, what service?

Answer



Case Note: Customer called Case Manager. He stated he just passed his test yesterday and received his CDL License. Customer asked if Case Manager has any job leads for him since his unemployment will be running out very soon. Case Manager states she will email customer job openings. Customer emails Case Manager back later that day thanking Case Manager for the email and states he has applied for two of the positions.

Yes

Job Search Activities & Assistance

The customer emailed back and stated he applied for two of the positions

Example 5



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Case Note: Career Coach created IEP with customer.

Is this a Service?

If yes, what service?

Answer



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Case Note: Career Coach created IEP with customer.

Technically, yes

Develop IEP

Yes, however, this is an example of a poorly written case note

Correct Example



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How can this case note be written to document a service was provided?

Case Note: Customer and Career Coach met in the office today. We discussed his employment goals. Customer stated his goal is to become a CDL Driver. He has a son that does not live with him so the option to go over the road will work. We went over the steps it will take for him to complete this goal. Some of the steps include, researching labor market, visit at least two schools, attend and complete ITA Training, attain his CDL license, update resume after training, attend interviews and provide supportive services if needed.

Service vs. Case Note



➤ Service

- Is provided when staff uses information to determine a course of action or next steps for a participant.
- Something “actionable” must take place between the participant and the Career Coach.
- When an action is taking place with participant, refer to the Service Matrix to ensure the correct service is recorded.

➤ Case Note

- For example, you held a brief conversation to verify employment or ensure everything is going well with the participant, and no requests are made of you for more services.
- You are NOT providing a service.
- General Case Note is the method of documentation.
- Individual cases should be reviewed for exit when no service is provided.

Customer Engagement



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- How are we keeping customers engaged?
 - ❖ Are you celebrating small successes with your customer?
 - ❖ Are you encouraging them along the way?
 - ❖ Are you intervening if there is an issue with their training or employment?
 - ❖ Are you addressing barriers?
 - ❖ Are you keeping your word with your customer?
 - ❖ Are you following up regularly?
 - ❖ Are you providing good customer service?
 - ❖ Are you adding a personal touch?
 - ❖ Are you being honest with your customer?



- We should be the role models and lead by example
- We are all in this together
- Your success is our success

Help Desk Resources

➤ WIOA Service Matrix & Definitions:

<https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>

➤ Case Note Guide:

<https://workforceboard.zendesk.com/hc/en-us/articles/360058453731-C>

➤ Customer Flow Webinar Series:

<https://workforceboard.zendesk.com/hc/en-us/articles/360060897212->

Up Coming Training Sessions



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- Objective Assessment Summary (OAS) week of 4/22
- Individual Employment Plan (IEP) week of 4/29
 - Please note this workshop is only for Adults & Dislocated Worker programs. We will be scheduling separate workshops for the Youth Individual Service Strategy (ISS) at a later date.
- Coming Soon: ITA Webinar 5/8
- **Services & Case Notes In-Person 5/21 (New Date)**

Registration LINK: <https://workforceboard.zendesk.com/hc/en-us/sections/360000173031-Upcoming-Trainings>

Questions?





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