



CHICAGO COOK
WORKFORCE PARTNERSHIP

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Case Noting: Taking Care of Business

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VISIT OUR NEW WEBSITE: chicookworks.org



Continuum of Career Coaching



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Objectives

- Demonstrate how case notes are used to provide program accountability as well as documenting a participant's achievement
- Stress the importance of timely, concise, accurate case notes
- Review **NEW!** Case Note Guide & Provide a Quick Demo
- Explain the standards of a good case note and how to organize a case note
- Tips for the Career Coach and Agency
- Technical Assistance & Resources
- Surprise for Last Day of Class



What is a Case Note?



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- 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 Note: Program Accountability



- A 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 are subpoenaed by the court system

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

The Importance of Case Notes



Case Notes: Timely, Concise, Accurate



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A good case note conveys the information that is relevant to the interaction or service being provided.



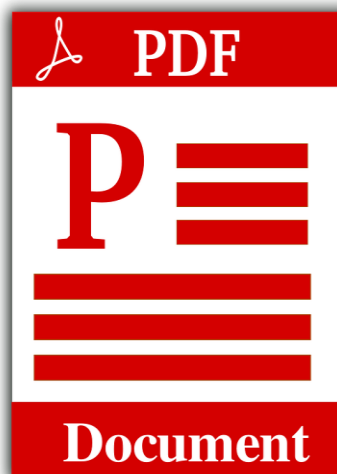
- Every 30 days, two-way conversation
- Recorded in a **TIMELY** manner (ideally within 24 hours)
- Clear and **well-written** (watch for typos or grammatical errors)
- **Accurate**, concise and complete
- **Objective** and impartial

Case Note Guide and Demo

Introducing the Case Note Guidance for WIOA Adult, Dislocated Worker and Youth Programs



[[Assist an individual](#) | [Staff Services](#) | [Individual Portfolio](#)]



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 - [-] [-] [General Profile](#)
 - [+] [-] [Summary](#)
 - [+] [-] [Case Notes](#)
 - [+] [-] [Activities](#)
 - [+] [-] [Documents \(Staff\)](#)
 - [+] [-] [Identity Issues](#)
 - [-] [-] [Case Management Profile](#)
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Case Note Demo Example: Placement



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Example:

Subject Line: Training Related Placement

Contact Type: Telephone

Case Note Description: Participant called to report that she accepted an offer at Bradford Logistics as an IT Helpdesk Associate and started 12/15/21. She is making \$22.00 per hour part-time. Participant sounds very excited. CC will follow up with customer.

Better Example:

Case Note Description: Participant called Career Coach (CC), 12/15/2020 to inform CC that she was hired yesterday by Bradford Logistics located at 5701 19th Ave., Brookfield, IL. Mary received an offer letter via email last week and has forwarded the letter to be saved in her WIOA file. Participant says she is very excited to use her learning from her IT course. Also, she feels that her previous customer service experience will be very beneficial in dealing with different departments and employees. Also, she is confident her work schedule will still allow her time to complete her ITA and the participant says the employer is supportive of her training. Per the offer letter, the following information has been provided:

Position: IT Helpdesk Associate

Pay: \$22.00 per hour

Hours: 20 hours per week with possibility of full-time in 6 months

HR Supervisor: Terence Cale

Phone: 708-999-0000

CC will contact customer in 2 weeks (December 29th) to follow-up on her progress. Participant works Tuesdays and Wednesdays 8 am - 4 pm and Thursdays 8 am - 1pm. She stated that her cell phone remains the best way to reach her. Participant has agreed on call and will contact CC if there are any concerns beforehand.

Case Note Demo Example: Transportation



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Example:

Subject Line: Support Service - Transportation Assistance

Contact Type: Face-to-face

Case Note Description: Participant started a job at Bradford Logistics as an IT Helpdesk Associate. Career Coach provided her with a monthly bus pass and will follow up with the participant.

Better Example:

Case Note Description: Participant does not own a car and will be using public transportation to get to and from her new part-time job at Bradford Logistics and IT courses at Triton College. This participant does not currently have money for transportation. Career Coach (CC) provided monthly bus card to be used for the month of December and into January 2021 for travel to and from school and work. Ventra card number XXX-XXXX-XXXX was provided and signed for by the participant today. Participant is scheduled to follow-up with CC in two weeks, or on December 29th, regarding any further needs.

Case Note: Standardizing and Organizing



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



Do NOT include:

- Personal opinions, stereotypical comments, or any offensive statement
- Personal health details
- Acronyms, abbreviations, jargon or slang
- Unqualified statement



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

NOTE: refer to yourself as third-person in notes, do not use “I”



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 discussed
- 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 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 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 was the contact made?**
 - Virtual
 - In-person
 - 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 Tip: Sustainable Schedule



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

Power of Engagement



Case notes are the heart of documentation for our industry work but keeping our participants engaged is **CRUCIAL**.

How are we keeping them engaged?



Case Note Tip: 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

Steps for Technical Assistance



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1. Go to the Career Connect Helpdesk website to find and read policies, procedures, webinar recordings and download documents regarding our training series and/or other WIOA information <https://workforceboard.zendesk.com/hc/en-us>
2. Check with your Supervisor
3. Send a Helpdesk request ticket or
4. Check with your Regional Manager or Program Coordinator via an email

Regional Managers & Program Coordinators



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<https://www.illinoisworknet.com/>

Illinois workNet along with affiliates and community partners, provide one-stop delivery of services, connecting individuals, employers, and education and workforce partners to career planning, education and training, employment resources and tools and workforce programs. Illinois workNet seamlessly connects people to local and statewide in-person and online services and is open to all Illinois' citizens, employers, and education and workforce partners. Find specific portals on Guides & Tools, Illinois Initiatives, State Partner Resources, Success Stories , Article & Tips.

WIOA Wednesday Webinars

Watch [recorded videos](#) and [access training materials](#) on a variety of topics to better serve your WIOA participant.

<https://cjc.net/>

Chicago Jobs Council is a coalition of community-based training organizations, advocacy groups, businesses and individuals working toward ensuring access to employment and career advancement opportunities for people living in poverty. Since 1981, CJC's membership has grown to include over 100 organizations and individuals. Through collaboration, advocacy, applied research, and capacity building, we work with our members to influence the development and reform of public policies and programs designed to move people into the workforce.

<https://www.workforcegps.org/>

WorkforceGPS is your online technical assistance website created to help build the capacity of America's public workforce investment system. Sponsored by the Employment and Training Administration of the U.S. Department of Labor, WorkforceGPS was developed specifically for workforce professionals, educators, and business leaders. [Here you will find curated communities of interest, useful webinars and other training resources, promising workforce development practices, and relevant evidence-based research – giving you the tools you need to help you create innovative approaches to improve the employment prospects of job seekers.](#) We invite you to come and engage with your peers by joining WorkforceGPS today.

<https://www.nawdp.org/>

The **National Association of Workforce Development Professionals (NAWDP)** is a professional association representing individual workforce development and human resources practitioners, who connect jobseekers, educators and companies to advance the American economy.

NAWDP 's mission is to advance the workforce development profession by providing training and resources to its members, improve the effectiveness of the nation's workforce development programs, and enhance public-private cooperation in the pursuit of full employment.

NAWDP approved the plan to offer the **Certified Workforce Development Professional (CWDP) certification** in 1997, and it was endorsed by the NAWDP Board and launched in 1999.

In 2004, three specialty endorsements were added to the **CWDP: Job Seeker, Business Services and Management Services**. The Youth Services Endorsement was added in 2006, and in 2013, the CWDP competencies were updated and approved.

Last Day of Class!



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Questions



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Thank you for your time



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Spring is 9 days away!

Have a great rest of your week 😊