



Workforce Development



# Case Note Training

**Presented by:**  
WDD Administration

San Bernardino County  
**YOUTH**  
*Forward*

# Training Objectives

1. To identify and avoid issues uncovered during review of files from monitoring
2. To review fundamentals and basics of case note construction and development
3. To discuss activity codes to ensure proper usage
4. To discuss what has been learned



# Type of Case Notes

List of Case notes, but not limited to:

- Information about the Youth (tell the story)
- All the Barriers associated with the Youth
- Assessment outcomes (Pre and Post)
- Individual Service Strategy (ISS)
- Supervisor review and approval of application
- Quarterly ISS updates at a minimum
- Services being provided
- Activity codes
- Attendance if participating in training



# Type of Case Notes

Continued:

- Any of the 14 Youth Elements provided
- Supportive Services provided to the Youth
- Quarterly Follow-up Services
- Work Experience
- Any communication with the Youth
- WDD Youth Analyst emails, if applicable
- Help Desk ticket
- Addressing data unable to be corrected by WDD or state



# What Not to include in Case Notes

- Medical/Disability details
- Personal Opinions
- Irrelevant facts (i.e., lack of available funding, clothing youth wore to appointment)
- Offensive language
- Personally Identifiable Information about other Youth
- Non-universal Acronyms without providing explanation
- Services provided prior to enrollment



# Why do we Case Note?

- Document/chronicle services provided to Youth
- Protect against program complaints
- Build case for additional services
- Provide snapshot of Youth's status
- Monitoring visits
- Show the connection between services and activity codes



# Best Practices

- Use Templates appropriately, individualize them, update information associated to the Youth (i.e., he/she, him/her, etc. needs to be updated)
- Avoid late entry of case notes by entering them within 24 hours of service
- Review prior case notes to ensure the correct information is being updated
- Don't repeat same information multiple times (i.e. 412 and 413 activity codes (same information) entered minutes apart)
- Avoid duplications
- Use the What, Why, and How method to describe services

# Personal Opinions and Facts

A case note is a written record of facts and documents the interaction between a case manager and the Youth.

The following are opinions and are NOT to be included in case notes:

- The customer is lazy and is not looking for a job
- The customer is rude and refused help

The following are facts, and can be included in case notes:

- The customer indicated he has been looking for a job and did not provide a job search log as requested.
- The customer stated he was not seeking assistance on multiple occasions, and on one such occasion ended a phone conversation without notice.



# Case Note Entries

Case notes should be entered in the CalJOBS system on a timely basis. Case notes should not describe unnecessary personal information. Case notes are able to be edited, so duplication is not necessary to correct an entry.

## REMEMBER:

- Case notes tell the Youth's story
- Case notes should include detailed but concise information gathered directly from the Youth
- Case notes also serve as a critical record of accountability for both the case manager and Youth

# What, Why and How Method

1. What service was provided?
2. Why was the service provided?
3. How will the service benefit the customer?

## **Example #1:**

1)The Youth was provided with transportation assistance of \$50 in gas cards 2) due to the youth's lack of financial resources to meet this expense. 3)This will benefit the youth by allowing them to attend job fairs, interviews, and visit the job center.

## **Example #2:**

1) The youth was directed to a job lead for an administrative position to 2)supplement the youth's existing job search. 3) This will benefit the youth by giving them another job opening to review and potentially apply to.

# Why do we enter case note activity codes?

- Report activities to the State
- Reveals the volume of services provided by the system
- Serves as the “data validation” of case notes entered
- Snapshot of all services provided to the Youth





# Activity Codes – Best Practices

- Open and close on same day (all activities except for training)
- Enter activity code in CalJOBS within 24 hours to avoid forgetting
- Ensure activity code matches the case note, date, and ISS
- Ensure dates entered in the system are accurate; it is easy to put in today's date when completing data entry for an activity that occurred yesterday
- Ensure the correct MSG or Credential activity code is entered into CalJOBS; know the difference

# Activity Codes (MSG/Credential) & Case Note Example

## Which is correct and Why?

- #A – Youth was enrolled in a Medical Assistant certification program and received a certificate of completion. An MSG and Credential was entered into CalJOBS, and activity code 416 was closed.
- #B - Youth was enrolled in a Medical Assistant certification program and received a certificate of completion. An MSG was entered into CalJOBS, and activity code 416 was closed.

# Activity Code - Case Note Examples

Case note

**B**

Is acceptable

The Youth only received a certificate and not a license or credential





# Case Note Examples

Which case note is acceptable and Why?

#A – Met with Youth today, Jane is a 20-year-old single parent who is Basic Skill Deficient. Jane's CASAS assessment is 247 in Reading, level 5 and 217 in Math, level 3. Jane is looking to complete her GED and receive training for LVN. Activity code 412 and 413 entered into CalJOBS.

#B – Youth arrived late, wants to complete GED but has no ambition to attend school.

# Case Note Examples

Case note

**A**

Is acceptable



# Case Note Examples

Which case note is acceptable and Why?

#A – Youth wants to get work experience in a warehouse facility. Scheduled an interview with Amazon.

#B – Completed ISS with Youth, Joe is a H.S. Graduate, lives in a low-income area and is a Foster Care Youth. Joe has experience in warehouse and is looking for a full-time job. Joe will benefit from work experience and scheduled an interview with Amazon for 6/26/24 at 10am. Warehouse position pays \$18.00 an hour and if accepted will work total of 24 hours, three days a week. Activity code 412, 413, and 434 entered into CalJOBS.



# Case Note Examples

Case note

**B**

Is acceptable



# Review and Recap

- Reviewed fundamentals and basics of case note construction and development (What, Why and How Method)
- Discussed activity codes to ensure proper usage
- Identified types of Case notes to be completed
- Discussed examples of case notes, what is and is not appropriate

# Any Questions?

