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|  | PROGRAM PROCEDURES P-PPF: CASE NOTE PROCEDURES |
| | DATE: 7/1/16 |
| | <input checked="" type="checkbox"/> NEW <input type="checkbox"/> REVISED |

Case Note Procedures

To document the details of the activities of participants case notes are required in i-Trac.

Actions not requiring a case note

Services that are recording completion of action with no additional information do not require case notes. Actions are documented by i-Trac;

- Assessments
- Workshops
- Documentation
- Payment (include purchase order or check number in “Reference”)

Actions requiring a case note

Services requiring a narrative case note of actions required. Samples of the actions are documented by i-Trac;

- Career Guidance - Note overview of guidance
- Career Exploration – Highlights of exploration
- Employment/Service Plans – Note Goals and next steps
- Case Management – Communication overview
- Training – Goal and overview of training plan
- Work Based Training – Goal and training plan
- Payment Plans – Needs and obligations
- Credentials (Other than NCRC) – Description of credential
- Employment Information (Next steps) – Description of employment situation

Sample case note

Career Guidance

Meet with client today; he is having a hard time getting a job in the field he is trained in. We discussed On the Job Training. I gave him brochures that he could give to potential employers. I will also review open jobs and try and match an employer to him.

Employment Plan

Met with client and developed IEP based on strengths related to occupational goal. Next steps include the following: Occupational Goal: Truck Driver Labor Market Outlook: Bright Outlook Potential Employers: Trucking Companies Next Steps 1. Build on strengths to meet employment goals. Strengths include: A. Excellent work ethic B. Receiving UI 2. Meet with Truck Academy and learn about training program 3. Complete scholarship application 4. Complete NCRC test 5. Submit scholarship application 6. Plan to complete GED classes through WSO and earn GED Training/Skill Development Plan: Skill(s): NCRC, apply for CDL scholarship

References

WIOA Youth Customer Tracking i-Trac System Manual

WorkSource Adult/DW and Adult Discretionary Funds Customer Tracking System Manual