

MAKE A NOTE OF IT
How-To Write Good Case
Notes Every Time



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FORM A INTRODUCTION

ABSTRACT ...

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 course 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.

FORM B
ESSENTIAL LEARNING POINTS

YOUR CLASS NOTES ...

Use the resources provided in the webinar, handouts, and activities to find the answers to the following questions.

Questions:

1. The seven essential elements of a case note are:

_____	_____
_____	_____
_____	_____

2. The three universal standards for determining if a case note is good or not are:

- a. _____
- b. _____
- c. _____

3. Which of the following is NOT one of the common problems with writing case notes?

- a. Poor grammar and sentence structure
- b. Poor titles or weak subjects
- c. Inappropriate personal information
- d. Lack of imagination
- e. Contradictions, emptiness and repetition
- f. Opinions about the customer
- g. Other (things you have heard monitors and supervisors say in the past)

4. What is the most important consideration when deciding how to write a case note?

5. A reason case notes are difficult to write is that the case manager has to answer three significant questions. These questions are:

- a. _____
- b. _____
- c. _____

6. The Background Statement addresses changes in what?

7. What does the Reason Statement explain?

8. This type of observation is based on facts and does not include opinions.

9. Which statement summarizes the substance of a meeting with a customer?

10. Which statement evaluates the outcome of a session with a customer?

11. Which statement evaluates the progress a customer is making towards his or her goals?

12. Which statement can be most useful for writing the reason statement in the next case note?

13. Opinions should only be put into the case notes in the Impressions Statement.

TRUE FALSE

14. On which of the seven essential elements of a case note do most case managers typically focus?

15. The Impressions Statement is based on your gut feeling and has no objective components to it?

TRUE FALSE

16. Because a case manager using BRO CRIP knows what blanks need to be filled in, this structure actually helps the case manager ask the _____ during the session with the customer.

17. A case manager should always include a Background Statement.

TRUE FALSE

18. Case managers must clearly understand the _____ of a meeting in order to write a useful Results Statement.

19. Which statement tells the audience what should happen next?

**FORM C
BRO CRIP PRACTICE**

DIRECTIONS. Your job is to identify which one of the seven essential elements the statements below include. Each statement has been chosen because it significantly represents one of the elements.

CASE NOTE #1 ...

Ms. Gray is on tract to complete her training as scheduled. Along with her military background in IT, the completion of this training will provide Ms. Gray with resources to compete for IT jobs in today's market.

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

CASE NOTE #2 ...

At this meeting, Ms. Cortez was dressed in appropriate attire for the interviews that she has lined up.

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

CASE NOTE #3 ...

Before next meeting, Ms. Smith will check the bus schedule to insure that she will have adequate transportation for her new job. She will also find two additional alternatives for transportation in case she ever needs a back up.

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

CASE NOTE #4 ...

Since our last meeting, Mr. Jones has completed the WorkKeys assessment and enrolled in the Adult Ed computer training held at the One-Stop on Thursday afternoons.

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

CASE NOTE #5 ...

Mrs. Newton informed me that she had met her goal of finding child care for her two children by the end of the month. She also let me know that she had applied for five jobs like she had planned.

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

CASE NOTE #6 ...

Based on the goals established by Mr. Lynch, he is currently behind schedule to finish training by next summer.

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

CASE NOTE #7 ...

Ms. Galloway and the case manager discussed the various approved trainers for the commercial drivers license certification for which she has been approved. She decided that ABC Trucking was her best option based on location and time frame. The case manager then finished filling out the training voucher form and all signatures were received.

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

CASE NOTE #8 ...

Mr. Cooper came in to discuss resume building and interview skills.

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

CASE NOTE #9 ...

Ms. Johnson will take WorkKeys assessment next week as scheduled. She will also contact the ABC Community College to receive an application packet and will fill out the admissions application and bring it in with her when we meet in two weeks.

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

FORM D
LEARNING ACTIVITY: TEST YOUR SKILLS

DIRECTIONS. Below and on the following pages are samples of real case notes written by case managers in other local areas. Your job is to use what you have learned here to accomplish three tasks:

1. Identify which BRO CRIP statements (if any) are included in this case note.
2. List some of the common problems associated with each case note.
3. Rewrite the case note to include each element of the BRO CRIP Model. For this activity, you may use your imagination to “invent” details that you need for the case note. PLEASE NOTE ... you do not have permission to “invent” information back at your workplace.

PRACTICUM #1 ...

<u>DATE</u>	<u>COMMENTS</u>								
09/25/2010	<p>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.</p> <table border="0" style="width: 100%;"> <tr> <td><input type="checkbox"/> Background Statement</td> <td><input type="checkbox"/> Results Statement</td> </tr> <tr> <td><input type="checkbox"/> Reason Statement</td> <td><input type="checkbox"/> Impressions Statement</td> </tr> <tr> <td><input type="checkbox"/> Observations Statement</td> <td><input type="checkbox"/> Plan Statement</td> </tr> <tr> <td><input type="checkbox"/> Content Statement</td> <td></td> </tr> </table>	<input type="checkbox"/> Background Statement	<input type="checkbox"/> Results Statement	<input type="checkbox"/> Reason Statement	<input type="checkbox"/> Impressions Statement	<input type="checkbox"/> Observations Statement	<input type="checkbox"/> Plan Statement	<input type="checkbox"/> Content Statement	
<input type="checkbox"/> Background Statement	<input type="checkbox"/> Results Statement								
<input type="checkbox"/> Reason Statement	<input type="checkbox"/> Impressions Statement								
<input type="checkbox"/> Observations Statement	<input type="checkbox"/> Plan Statement								
<input type="checkbox"/> Content Statement									

PROBLEMS ASSOCIATED WITH THIS CASE NOTE. In the space below, document some of the problems that you think are associated with this case note, as it is currently written.

- | | |
|---|---|
| <input type="checkbox"/> Poor grammar and sentence structure | <input type="checkbox"/> Poor titles or weak subjects |
| <input type="checkbox"/> Inappropriate personal information | <input type="checkbox"/> Lack of imagination |
| <input type="checkbox"/> Contradictions, emptiness and repetition | <input type="checkbox"/> Opinions about the customer |
| <input type="checkbox"/> Other | |

REVISION. Rewrite a better case note using each element of the BRO CRIP Model.

B _____

R _____

O _____

C _____

R _____

I _____

P _____

PRACTICUM #2 ...

DATE

COMMENTS

11/12/2009

I visited Mrs. Jones today at her workplace with Acme Corporation. She has been on the job for one week. Mrs. Jones reports that she likes her job, but cannot seem to remember everything she is supposed to do. I told her that she might want to consider keeping a little notebook with her and writing down assignments so that she will be able to remember them. I also spoke with Mr. Timberlake, Mrs. Jones's new boss. He said that she has a good attitude but she appears to be a bit forgetful. I told Mr. Timberlake about Mrs. Jones's notebook, and he seemed to be pleased with that suggestion.

- Background Statement
- Reason Statement
- Observations Statement
- Content Statement

- Results Statement
- Impressions Statement
- Plan Statement

PROBLEMS ASSOCIATED WITH THIS CASE NOTE. In the space below, document some of the problems that you think are associated with this case note, as it is currently written.

- Poor grammar and sentence structure
- Inappropriate personal information
- Contradictions, emptiness and repetition
- Other
- Poor titles or weak subjects
- Lack of imagination
- Opinions about the customer

REVISION. Rewrite a better case note using each element of the BRO CRIP Model.

B _____

R _____

O _____

C _____

R _____

I _____

P _____

PRACTICUM #3 ...

DATE

03/7/2008

COMMENTS

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 any seizures in a good while. He really wants to be able to get his driver's license. He says school is going good so far this year.

- Background Statement
- Reason Statement
- Observations Statement
- Content Statement

- Results Statement
- Impressions Statement
- Plan Statement

PROBLEMS ASSOCIATED WITH THIS CASE NOTE. In the space below, document some of the problems that you think are associated with this case note, as it is currently written.

- Poor grammar and sentence structure
- Inappropriate personal information
- Contradictions, emptiness and repetition
- Other
- Poor titles or weak subjects
- Lack of imagination
- Opinions about the customer

REVISION. Rewrite a better case note using each element of the BRO CRIP Model.

B _____

R _____

O _____

C _____

R _____

I _____

P _____

PRACTICUM #4 ...

DATE

08/13/2010

COMMENTS

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 the 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.

- Background Statement
- Reason Statement
- Observations Statement
- Content Statement

- Results Statement
- Impressions Statement
- Plan Statement

PROBLEMS ASSOCIATED WITH THIS CASE NOTE. In the space below, document some of the problems that you think are associated with this case note, as it is currently written.

- Poor grammar and sentence structure
- Inappropriate personal information
- Contradictions, emptiness and repetition
- Other
- Poor titles or weak subjects
- Lack of imagination
- Opinions about the customer

REVISION. Rewrite a better case note using each element of the BRO CRIP Model.

B _____

R _____

O _____

C _____

R _____

I _____

P _____

**ATTACHMENT A
BRO CRIP Cheat Sheet**

DIRECTIONS. Use this worksheet to create a case note during an interview with your customer. When you are finished, you can transfer the information into your automated case management system as time permits.

B _____

R _____

O _____

C _____

R _____

I _____

P _____

ATTACHMENT B
About Your Workshop Facilitator

PATRICK LENGEL, M.DIV, GCDF

Patrick Lengel is a trainer with a twist. Not only is he a workforce development professional, but he is also an ordained pastor and a professional magician.

Patrick's work experience in the career development industry goes back to JTPA and both year-round and summer youth programs. He has specialized in youth workers as well as working with the leadership teams of various WIA programs. Patrick has served as a work-based learning facilitator within the public school system helping students discover their career potential through job shadowing, internships and coops. He has also served as a civilian career liaison for the National Guard assisting soldiers in their career transition. He has also been a consultant for various projects within the industry.



Patrick's focus these days is on helping case managers and service providers live up to their full potential personally and professionally.

