**Case Notes**

Teaching Aid:

Case Counselor Training


## EXERCISE 1

#### First, as a group exercise, everyone should read the 12/6/15 case notes entry. Instructor should take volunteers and ask them to share the following information:

* Which sentences were written in an active voice?
* How about a sentence written in a passive voice?
* Can the reader identify where the customer is situated in their training and job search goals? If you had to take over or supervise this case, is the entry of information clear?
* Based on what is written, is the customer getting basic, individualized or follow up career services?
* What might be the next activity or update for this customer in future case notes?
* How might this particular example be improved?

## EXERCISE 2

#### Secondly, starting with the 12/8/15 case notes entry, divide up the case notes entries among the group of trainees. All trainees should understand that these are just PARTIAL entries of Case Notes so they are not seeing the larger picture here. Instructor should then ask: Who reviewed (the next case note)? Trainees who reviewed that example would then share answers to the questions below. Continue through other examples during the time allotted for this activity.

* Which sentences were written in an active voice?
* How about a sentence written in a passive voice?
* Based on what is written, is the customer getting basic, individualized or follow up career services?
* What information may have been written before or after these examples?
* How might this particular example be improved?
* What might be the next activity or update for this customer in future case notes?

## CASE NOTES ENTRIES

12/6/15: Met with customer, Barry G. He is returning to work after incarceration at Elk Grove County Jail. Prior work experience as laborer, making $8.50/hour. Barry attended Welding Training at the jail but did not receive a certificate. He likes the work so we will connect him to a local CC to finish training and get certified. Need to make sure certification is portable and nationally-recognized (like American Welding Society AWS). Barry is staying at mother’s house and has bus pass to get to training and to AJC. Need to connect him with Dress for Success and health care sign-up. Also need to connect Barry with Legal Aid about pursuing expungement and gaining a Certificate of Rehabilitation.

12/8/15: Transitional work: Customer Barry G. may be eligible for OJT at Grove Warehouse (full-time employment option), or part-time options include registering with Mechanical Turk to offer his English-Russian translation services. Barry reports that he’s been attending his reentry support group and needs us to connect with his parole officer to verify attendance at AJC activities. Based on prior work history and notes from previous service provider, I don’t think Barry needs Essential Skills (employability) training. If employer requires the NCRC, we will pursue that certification route.

12/10/15: Customer Barry G.’s resume needs work. Will ask him to sign up for workshop next week. Should also attend interviewing skills workshop. Will ask Jesse (wkshp instructor) to spend time on tough interview questions for reentry.

12/30/15: Texted customer Barry G. to switch appt. from 2:30pm to 3:30pm on January 12th. This will give him time to attend support group. I connected with parole officer Sgrt. Genson and updated her on Barry G.’s activities to date. She said we don’t need to connect again until placement or 2 months’ time (March).

1/15/16: Customer Barry G. texted to say he’s been doing piece-work at Mechanical Turk, translating services Eng/Russian. $10/hour but only 10 – 15 hours per week. He missed a reentry group session due to work. Made a note to raise this at staff meeting to see if this should be reported.

2/18/16: Met with customer Barry G. Progressing nicely. He’s enrolled at Elk Grove CC for welding training using ITA. Training leads to portable credential. Exam and expenses are paid through his student fees. Update on previous note: no need to report absence from support group since it was one-time absence and customer is otherwise progressing. Barry completed resume and interviewing skills training. I asked a few “tough” reentry questions and Barry is prepared to discuss his past record with employers. When we scheduled this meeting, I asked Barry to dress as if for an interview and he was properly, professionally dressed. Update on previous note: Barry met with Legal Aid and is not eligible for expungement of record. The Certificate of Rehabilitation is difficult to pursue and may not be necessary if he obtains employment soon. He knows he can begin Cert Rehab process now for use later in his career, if necessary. Filed updated resume.

1/3/16: Customer Adele B. called. She said she completed the data entry training at Commerce CC and emailed certificate to me for the file. In addition, she stated that her unemployment benefits have been exhausted. We scheduled our next meeting for Feb 10th, at 10am. She will bring her updated resume and we will work on her marketing plan and interviewing skills.

12/12/15: Customer Brad D. was hired by A & C Manufacturing through Kelly Employment agency. Salary $48,000 plus benefits. He will start January 18th. He knows to remain in contact with us for follow up services. Set up tickler to contact him at the end of February.

12/20/15: Customer Celia Z. enrolled at Santa Monica CC for 12-week course leading to CNA certification. Finding out who pays for CNA exam for state credential. Cert of completion will not be enough for employers. Prior to course completion we will meet to consider forwarding resume to Women’s Health Circle on Blatt Street downtown. She may also be ready for the job fair that we are scheduling for May 1st. Celia may need Dress for Success support (check this). Celia is continuing her transitional job at doctor’s office.

02/12/10: Customer Gerry M. presented verification of employment. He is currently working with Los Feliz Medical Clinic as a Phlebotomist I, earning $8.00 hourly. Start date was 01/20/10. Provided Gerry with a $50 pre-paid cash card as his new employment incentive now that he submitted verification information.

### Examples of other brief entries in case notes:

4/10/12: Customer Mary G. enrolled at Hamptons CC for 14 week, 4-credit course in CNC Milling toward Associate of Science Degree and certification by MSSC for Certified Production Technician (CPT).

6/25/13: Customer Terry R. completed resume writing workshop and is editing her resume to reflect the job skills she identified through O\*NET for home health aide.

3/3/13: Customer Sandra L. brought in results of her MySkillsMyFuture research. She is pursuing Cutting, Punching, and Press Machine Setter jobs that pay between $12 and $19/hour in this area. She will also investigate training for NIMS certification in machining. She is ITA eligible.

11/30/13: Marc G. completed WorkKeys Teamwork Assessment at Level 5. Will continue training and testing before our next appt.

12/20/16: Spoke with Brad Cunningham, director of Columbia Area Community Center on Liggett Ave, 323-777-8999, bradc@CACC.org. They have 4 spaces available for unpaid interns in community service this summer and we will include Daryl E.’s resume as a candidate. These jobs are 15 hours/week for 6 weeks. Will provide transportation and uniform expenses and will be good experience for Daryl’s resume. Could also lead to letter of recommendation for CACC.

11/12/13: Customer Sam N. finished O\*NET interest profiler and shared his results. Scored high in Investigative 25 and Artistic 23. He is encouraged that the occupation Film Editor has a sunny outlook and our state has above average listings. Will update his resume to reflect editing work he did in high school. The salary range is $33k to $88k in Calif.

3/4/12: Customer Bernard L. was re-arrested and did not make our appt. Will schedule a make-up appt to discuss how this will impact training and job search. Contacted Joseph Rose of our AJC to inform him that Bernard will be missing the next few support sessions. Bernard may have to start the Essential Skills (employability) workshop from the beginning since he will have missed too many workshops. I will check with my supervisor to confirm this and make other arrangements.

10/10/12: Customer Alice N. completed WorkKeys assessments in Applied Mathematics, Locating Information, and Reading for Information. She will now try for NCRC.

1/15/15: Customer Lisa M. said she is having trouble remaining organized and motivated in job search. Recommended that she join the job club that meets weekly at the AJC. Also gave her templates to record her daily activities and progress for the job club meetings.

6/25/16: Customer Theo R. had networking coffee meeting with Roger Sellars at Chase Bank. Mr. Sellars recommended account analysts that Theo could email and possible meet about available positions at Chase. Theo will conduct some of these meetings and report back to me on progress. Theo will show his contacts the generic job descriptions he found on O\*NET and ask them if they reflect the tasks, roles and responsibilities of the jobs at Chase.

## ACTION VERBS TO CONSIDER

* Advised
* Altered
* Assessed
* Assisted
* Began
* Called
* Clarified
* Confronted
* Connected
* Contacted
* Counseled
* Discussed
* Directed
* Encouraged
* Enrolled
* Entered
* Fixed
* Finished
* Focused
* Followed
* Identified
* Looked
* Leveraged
* Linked
* Managed
* Needed
* Nurtured
* Oriented
* Organized
* Ordered
* Operated
* Prepared
* Produced
* Recommended
* Referred
* Started
* Structured
* Summarized
* Supported
* Urged

## WORDS TO AVOID

* Abnormal
* Abusive
* Anxious
* Dangerous
* Delusional
* Demanding
* Disturbed
* Hysterical
* Immature
* Impulsive
* Irrational
* Resistant
* Suicidal
* Threatened
* Troubled
* Uncooperative
* Unfit