

# Example Case Notes

---

Remember the following principles when writing case notes:

- ✓ Clear
- ✓ Factual
- ✓ Relevant & related to employment
- ✓ Include employment goals, restrictions or accommodations if needed
- ✓ Should follow the SENSE model

## **Example comments/case notes**

Demonstration of Progression and Sequencing

Veteran Customers in Case Management

Veteran Customer collecting UI

Ex-Felon with work limitations

Ex-Felon initial and follow-up appointments

Dislocated Worker and Disabled

Disabled needs work accommodation

Older Worker

Multiple Barriers meeting with counselor

Youth- Returning after absence from program

Out of school Youth

## **Demonstration of Progression and Sequencing: Example**

Customer ID: NY010514XXX

5/15/12

Customer in need of CDS: 12 years+ experienced machine operator, states he has been searching for employment prior to lay off 2 months ago. Reports that he cannot find job openings that match his skills and experience, this is consistent with local labor market as machine operator is not a demand occupation at this time. Resume appears well formatted and targeted for a machine operator position. The resume would need to be changed to pursue immediate employment to highlight transferrable skills.

Expressed interest in returning to school to earn a college degree. Completed 20 college credits in 1990. Reported that he had a 2.0 GPA and was on academic warning. Considering pursuing HVAC, but said he was uncertain of goal and seeking further information.

Based on assessment, customer has KSA for machine operator however not likely to return to that industry because of labor market. HVAC - goal needs to be explored and confirmed. Referred to 5/16 2pm JobZone Career Exploration WS, comprehensive assessment appt. on 5/21 and Training Orientation on 5/22.

5/16/12

Attended JobZone / Career Exploration WS. Created JobZone account and expanded knowledge of occupations related to machine operator, to explore transferrable skills for demand occupations should immediate employment be goal and determine existing skills that support tentative goal of HVAC. Agreed to complete the Interest Profiler and Work Importance Locator at home. Scheduled individual counseling appt. for 6/21/12 to interpret results and continue with career exploration.

5/21/12

Individual counseling – interpreted Interest Profiler results: RIC and Work Importance Locator results: Independence, Support, Working Conditions. Customer stated that assessment results accurately reflected interest and work values. Stated he loved working with his hands. Indicated increased certainty that HVAC is the right direction at this time. Believes HVAC was consistent with desired work conditions and need for independent work style. In response to question about desire for college degree, reported that he attended college and worked PT right after HS, feels he was not mature at the time to be successful. His motivation for college degree seems in part to prove to himself and family that he can earn the credential.

Explained that his family is very supportive. Believes this is a good time to further his education and pursue the HVAC certificate training. Plans to attend Training Orientation on 5/22 .

One area for further reflection and discussion are personal finances and ability to attend school full time and meet living expenses. Next appointment 5/31/12 to discuss outcome of ITA orientation, finances and synthesize assessment results, training information in IEP.

5/22/12

Reported an hour late for the ITA Orientation. Car broke down and had to wait for a ride. Stated that transportation is not an issue, this was an unusual circumstance. Brought school research information. Discussed 2 training provider options. After reading materials, state that he prefers a foundation of skills to increase marketability. HVAC program at ACC accepted him for the fall. Reed College is currently reviewing his transcripts for the associate's degree. Agreed to bring necessary paperwork to schedule appt. on 6/25/12

5/31/12

Need for training in HVAC is justified. Current skills as machine operator transfer and Profiler results support training for HVAC, a demand occupation in the local area and State. Accepted by ACC and Reed. Selected ACC for cost, reputation and ease of commute and schedule. Will need to work each semester's class schedule around spouse's work to accommodate family elder care issue. Does not appear to be an issue with class schedule. ITA will cover cost of training for full AAS degree. Is currently collecting UI, duration of training program is longer than UI benefit period. After UI, will meet basic living expenses with spouse's income, savings and PT work. Understands to bring necessary documentation to 6/25 appointment to complete ITA application and 599 application.

### **Veteran Customer in Case Management: Example 1**

11/1/11 Attempts have been made via formal letter and email to have a face to face meeting with this vet that have been unsuccessful. An email was sent to Michele requesting a status update regarding her employment needs and extended an invitation for a face-to-face meeting, this was also unsuccessful.

03/13/12 A total of 13 job leads since January have been sent to this vet. They include a job lead for computer support specialist and software tester, a computer support/IT tech job, a job lead for computer support to customer, and IT support and computer software tester.

5/23/12: A phone message was left with Michele requesting a status report regarding whether or not she is gainfully employed at this time. Case manager, again, invited her in for a face-to-face meeting, as of April the customer has yet to come in for a face to face meeting since she was initially referred in November 2011.

6/15/12 Case manager attempted to provide a job lead via Michele's email address however the message came back as undeliverable. Case Management closed

**Veteran Customer: Example 2 (meeting with Veterans Rep and counselor)**

3/20/12: Initial assessment determined in need of CDS. Customer is a UI Vet, is CSA eligible, and is seeking training funding to attend CNA certification. Requires resume assistance. Pre qualifying documents on file: NYS drivers license, SS card. Will bring in DD214. TW registration. Appt made to see career counselor for intensive services on 3/28/12 at 2:30pm to discuss training options.

3/22/12: Dropped off copy of DD214. Unscheduled visit. Vet was given resume review and assistance. Resume sent to SMART for job leads while pursuing career counseling and training.

3/22/12 Brief unscheduled interview with Vet. Mr. Smith is a Navy Vet. He has been working as an HHA. Recently had a 3yr stint caring for an elderly ill man at the man's home. He is interested in funding for a CNA to enhance his employability. Explained training policies and parameters. Vet will keep appt. on 3/28 to discuss training. Vet disclosed that he has a service-connected disability, which he has never sought VA assistance for. Made a appt for VET to see Rockland VA Rep on 4/4/12 to follow-up on his service-connected disability. Also gave VET info reg food banks and additional supports since his UI will be used to pay rent and he expressed concern in paying bills. Next appt. with counselor on 3/28 at 1pm.

**Ex-Felon: Example - Work Limitations**

Offender per customer attestation dated 10/2/11. CNA with experience, skills and training. Two year gap in work history. Per offense customer needs to redirect job search. When discussing the requirements for residential care facilities, customer expressed difficulty with job search transition. Next Step: referred to intensive level services for a comprehensive assessment and individual counseling appointment to identify new career path on 10/10/11 at 2pm. \*\*\*\*Customer cannot be referred to employment in a residential care facility. \*\*\*

**Ex-Felon: Example - Initial and Follow-up appointments**

**11/12/10**

DW with seven years manufacturing experience. K/S/As for an Assembler. Poor labor market for occupation at this time. Customer disclosed ex-offender status. Provided federal bonding, COGC and Prime Objective information, as well as workshop listings. Created SMART resume. Interested in pursuing Cert. of Good Conduct. Expressed concern about job search and interest in exploring other positions. Next Step: Counseling apt on 11/16/10, 11am with Sue.

**11/16/10**

Individual counseling appointment to discuss transferrable skills, identify job search strategy and determine impact of ex-offender status on employment prospects. At the onset of the appointment Joe expressed that he did not think he had any skills that would transfer to any other "good paying job" and that he was destined to work for minimum wage. Used O\*Net and MySkillsMyFuture to create list of transferrable skills for Assembler. Identified 2 comparable job titles with similar pay: Inspectors and Testers and Transportation, Storage and Distribution Managers. Comparing the Assembler skills with the two new titles Joe seems to see a connection and stated that there may be hope for him to return to work.

Prior to his position as assembler Joe was convicted of an E class felony. He did not serve any jail time and has successfully completed his period of probation. This was his only interaction with the

judicial system. It does not appear that the ex-offender status will affect job search. He stated that he volunteered this information during his first interview with One-Stop staff because he did not know how it would affect his future employment. After a discussion of the pros and cons of volunteering this information during the job application process, Joe concluded that he may not need to disclose this information if not asked.

His solid work history, positive reference from former supervisor should enable Joe to secure other employment.

Job Search strategy next steps - attend resume writing workshop on 11/25 with list of transferrable skills and job lead provided today for Inspector position. Apply for inspector job with resume created at workshop. Test labor market for tester and warehouse managers by searching for these types of positions until we meet again on 11/29 to evaluate progress toward reemployment.

### **Dislocated Worker and Disabled: Example**

Dislocated worker due to mass layoff requesting assistance in finding work. Stated that he has 5 years experience as a shipping and receiving clerk. He would like to continue the same type of work and needs a minor accommodation -keyboard with larger keys- in order operate a computer. Accommodation resources were discussed. Customer does not have a resume. Developed interim resume using SMART and subscribed customer, obtained job leads and discussed. Customer will apply to 4 jobs. Signed up for resume writing workshop on 7/3/12 to enhance temp resume.

### **Disabled: Example 1**

Met with Abbey today to discuss possible employment opportunities with her and to assess her job skills and prior employment experience. Abbey has an IEP Diploma from Summit Academy in Buffalo and has worked at Sunshine and Rainbow Children's Center, McDonald's, and Scholastic Books. At McDonald's and Scholastic Books her responsibilities included stocking, filing, and cleaning. References from these positions describe her a hard worker who is willing to try any job-related task assigned to her. Abbey was uncomfortable with the level of autonomy required in her position as a childcare assistant at the Sunshine and Rainbow Children's Center and left the job. Abbey's employment goals are to find a job in an office in which she can use her computer skills stocking, filing, and/or providing customer service. She prefers not to work with children. Abbey is working on a resume and will bring what she has completed to our next appointment. Abbey acknowledges that she requires certain accommodations at a job site, including an accessible location and periodic access to a private space to manage some personal health needs. A referral will be initiated to for further skills assessment.

### **Disabled: Example 2**

Initial meeting with Andrew today to discuss his employment history and current employment goals and to assess his job skills. An ASL interpreter was on site. Andrew earned an IEP Diploma from P.S. 20 and has over 3 years experience working in various restaurants. His job responsibilities have included site maintenance, including cleaning kitchen and dining areas; food preparation; bussing tables. Andrew has lost jobs in the past due to lack of work at the restaurants and closures. Andrew has been disappointed by the loss of these jobs and is anxious to obtain employment again, although he feels he would prefer something more creative than food preparation. At work, Andrew benefits from the assistance of a supervisor or other support person who can communicate using ASL. A referral will be initiated on Andrew's behalf for assistance with benefits management and help processing the loss of his previous jobs. Andrew is scheduled to return next Tuesday to work on his resume with counselor. This will be very beneficial in identifying his transferable skills and broadening his job search.

### **Older Worker:**

Customer met with counselor because he was having difficulty finding employment. Assisted customer with brainstorming different job search strategies. Helped Robert fill out an on-line application for Walrath Recruiting, Accounting and Finance job. Submitted customer's resume to [www.indeed.com](http://www.indeed.com) and Capital Area Help Wanted. Customer expressed that he is frustrated because he feels he is being discriminated against due to his age. He is 63 years old and feels that "every employer thinks that he is going to retire or leave in a couple of years." Customer was encouraged to revise his resume, take off dates of graduation, add that he updated his computer skills and that he always keeps current in his field. His resume also went back more than 20 years so Robert is going to make modifications. Customer was given different strategies to deal with age discrimination and written materials/articles. Recommended that he mention his high energy level and that he enjoys learning new things. Customer is not ready to retire for quite some time as he "likes to keep busy" so he was encouraged to state that during interviews. Customer will call counselor in two weeks to report on job search status.

### **Multiple Barriers: Example**

Met with customer after her meeting with Disability Coordinator to clarify what she needed and how to proceed from here. Customer would like to work a few more years before retiring and states she is only qualified to do housekeeping because she cannot answer phones or use the computer.

Customer states she is depressed and feeling worthless. Customer states she has a lot to give and is discouraged because no one will give her a chance because of her age. Barriers were identified that could be contributing to her not being given a chance such as no drivers license, no GED, and providing childcare for a grandson.

Validated customer's feelings and offered encouragement. Reminded customer that job searching takes time and to draw on supports that she previously identified. *Discussed obtaining her driver's license and childcare options for grandson. Critiqued resume and discussed revisions, completed a job browse and we selected appropriate jobs for customer to apply to.* The customer left saying she feels more motivated as she will attend the job search workshop, make discussed changes to her resume, and apply to 2 job referrals given before we meet again on June 21st.

### **Youth: Example 1-after long term absence from program**

Last worked with Tarika 5 months ago. Today Tarika expressed her commitment to look for employment-since she is a new mother of a 5 month baby. Assessing her career goals, Tarika mentioned her desire to become a nurse and apply to BCC to become a certified RN. However, for now she is in need of a survival job. For better preparation signed Tarika up for the customer service training on 2/3/2012- upon completion she will be certified. Gave Tarika 5 job leads from: Sears, Bridgewater nursing home, CVS, Dunkin Donuts, and Western Inn- which fits her requests for a survival job. Tarika is due back to the One stop, 2/20/2012 for the resume workshop. In the mean time Tarika confirmed that she will apply to these job listings and continue to actively seek employment and enroll for night classes at BCC.

### **Youth: Example 2**

Initially came in to sign up for our GED training. During evaluation discovered some barriers that hindered Sandra's job search. The first was her need for transportation assistance. She will be receiving a bus pass for the training period of 9/09 -06/10. Second is the absence of a computer in her household. Provided Sandra with the One Stop overview, going through all the services we provide-specifically the resource room and computer access. Showing great interest in our trainings, Sandra enrolled for the IC3 training (9/15/2012) and the Step Program. At this time

Sandra does not have any career goals other than receiving her GED. I mentioned to contact me in the future to create or modify her resume. As for her next steps, Sandra will return to the One Stop for her GED training, held every Thursday this month. Sandra seemed relieved to learn about the resource room and said "I will be here at least 4 times a week to look for jobs online".