

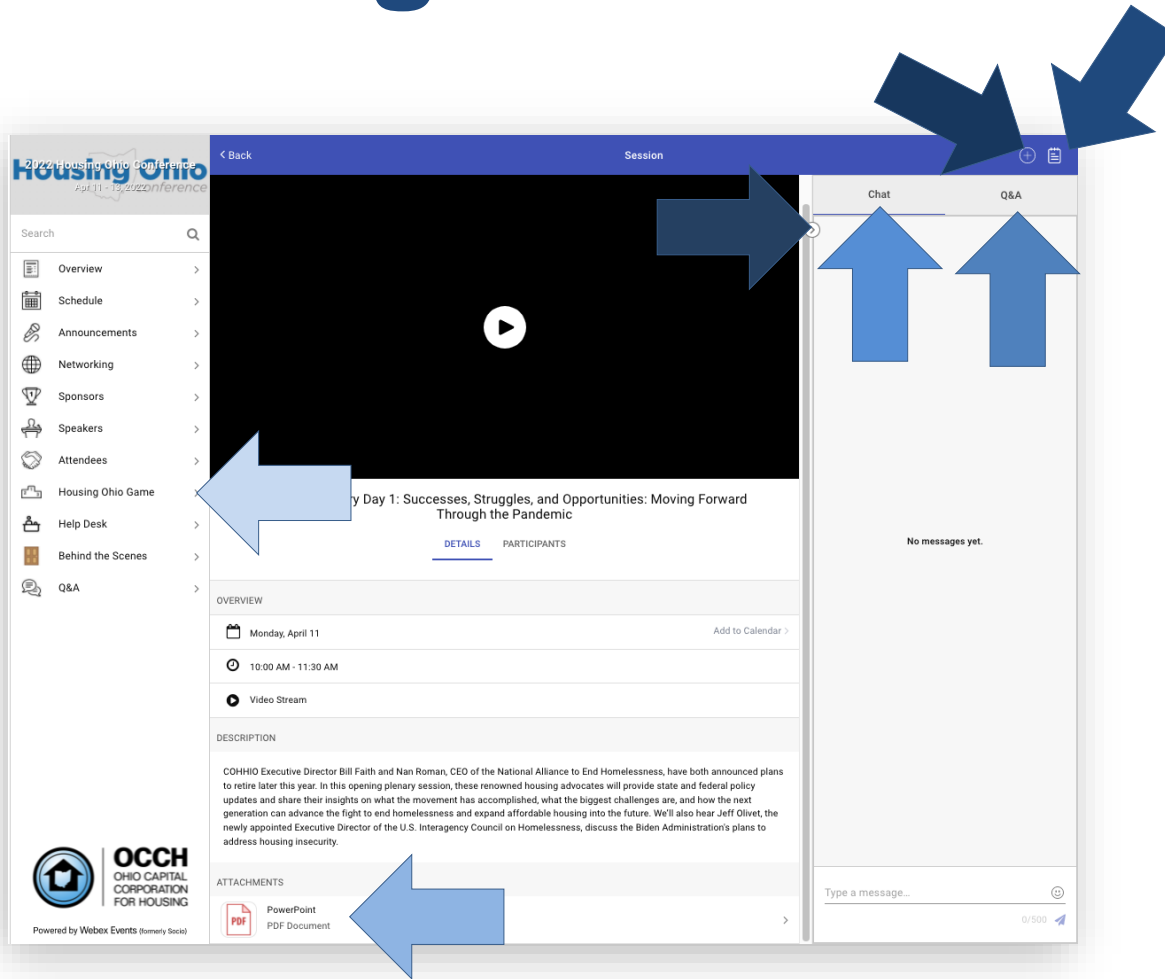
Case Notes and Goal Planning

Tuesday April 11th, 2023

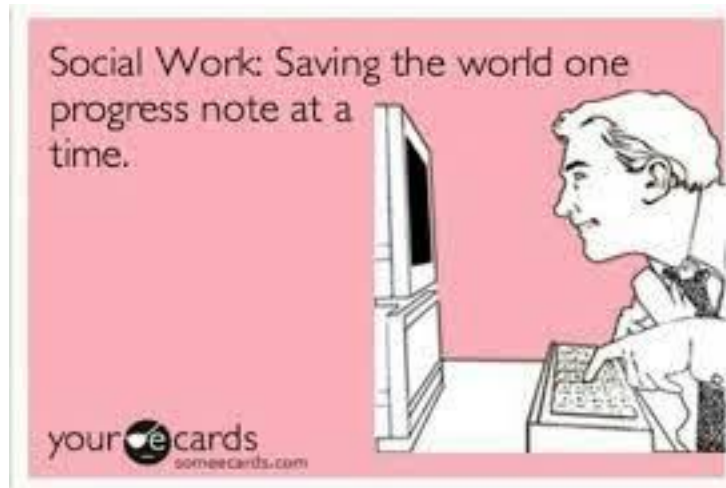




Session Logistics



Case Notes and Goal Planning

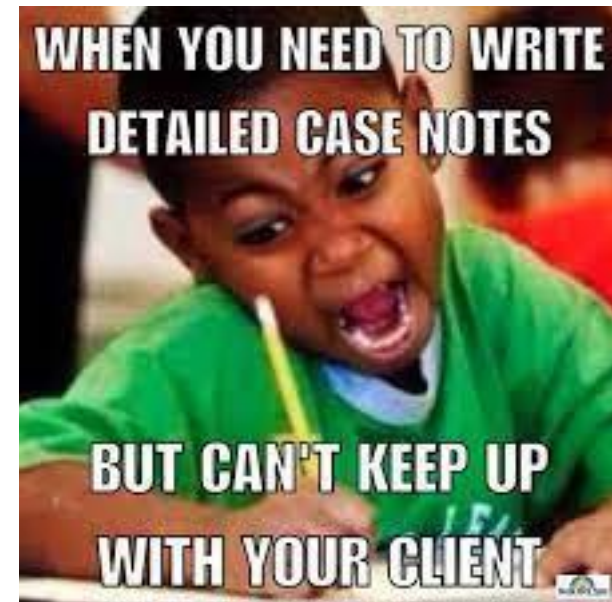


Presenters:

Aubre T. Jones *LISW-S*

How do direct-service professionals feel about case notes?

Me and my case notes looking at each other like who's going to do this?



Case Notes Support the Mission

- Recording case notes can support this mission in the following ways:
- Assessment Summary
 - Documented deficiencies and barriers recorded in case notes should be linked directly to services and activities provided by the agency
- Case Management Guide
 - Case notes allows tracking and reporting of client contact and progress
 - Keeping well documented notes will allow you to capture any newly emerging barriers
 - This will help revise the client's action plan as they go
- Accountability
 - HMIS is considered the "system of record", and is considered the authoritative source for homelessness data in Orange County
 - Recording everything in one place allows for internal oversight and makes monitoring and auditing easier on the agencies
- Information Sharing
 - In-house: Sharing of important data and action plans are critical to the success of clients in programs
 - External: Sharing case notes will optimize referral relationships with outside partner agencies and allow for a better action plan for the client

When entering Case Notes or Housing Notes, remember that the client has the right to review anything in their client record, including Case Notes and Housing Notes.



Purpose: Identify the purpose of the session



When documenting the purpose be clear and descriptive when detailing the client's current situation(s), condition(s), and assessment of client and/or reason presented during the session.



Question to answer:

“Why is this session necessary?”

- **Intervention:** The intervention you provided in the session
- When documenting the intervention use descriptive sentences about your interventions (i.e. what you did). Identify the skills used to cope, adapt, respond, or problem solve. Reinforce new behavior and strengths. Identify specific skills that are taught, modeled, or practiced.
- Question to answer:
 - What did you do to assist the client?

- **Best Practices for entering Case Notes**

- Case notes should be entered the same day that the incident or session related to the case note occurred, or the next day if it is not possible to enter them on the same day. Recording the information as soon as possible makes it so that information is more accurately collected.
- It is important that case note utilize as many facts as possible. Record what was observed or heard and by whom, as well as any historical information (verified by available information)
- If recording inferences or assumptions, it is necessary to identify these entries as such. Phrases such as "appeared to me" or "seems to be" should be used, then explain why the inference or assumption is being made.
- Case notes should avoid diagnosing, jargon, or stereotypes and prejudices.
- Case notes should avoid using emotionally charged words. Some examples of emotionally charged words include abnormal, dangerous, delusional, disturbed, hysterical, immature, impulsive, threatening, and uncooperative.
- Complete sentences do not need to be used as long as the meaning or intent of the statement is clear and intact
- Case notes should only contain relevant information, meaning that it only contains important and significant information that relates directly to the client's well-being.

Best Practice Bingo

- **Examples of Case Notes that do not follow Best Practices**

- "I drove over to the workshop to see Kris, went into the building and saw her talking to a friend. I walked up to her and I needed to talk with her about her SSI check."
- "Derek was acting out."
- "Mrs. Jacobs seems very depressed."

- **Examples of Case Notes that follow Best Practices**

- "I talked with Kris about her SSI check."
- "Derek skipped school and was caught shoplifting."
- "Mrs. Jacobs stated 'Of course I'm depressed. Wouldn't you be if you were in my situation?'"

Do it immediately

Templates, Templates, Templates

When you add "will continue to monitor" to the end of your note for decoration.



Program Logos

- Cut n' Paste

Questions

CEU Code

HOC513