

Case Notes: Service vs Update

Important Note: All Individualized, Training, and Support Service Touchpoints in ETO require a case note. However, not all case notes require a touchpoint in ETO.

Examples of Case Notes that are Status Updates Recorded as Services in ETO

The following examples are actual case notes for qualifying services pulled from WIOA participants' files but are status updates. A status update is when the case manager checks in with the participant for information and progress updates. These examples show instances where the case note does not indicate a service was provided but was entered as a service in ETO. A brief explanation of why the case note is a status update and not a service will be provided after each example.

Example #1:

Career & Vocational Counseling:

Participant will continue at Clark Community College for Winter Term. Participant will let me know about his traveling to attend in-person learning. Participant will provide me with a copy of his class schedule. Winter term begins 1-3-22. I don't have his official grades yet but he did receive all A's for fall term. Participant will let me know about any supplies he might need for winter term.

Why is this a status update and not a service?

The above example does not show that the case manager provided a service to the participant. The case note is providing an update on what the participant will be doing. There are no statements with action words explaining that the case manager provided some type of service such as providing counseling assistance.

Example #2:

Career & Vocational Counseling:

Participant continues to work a survival job. He states he has not received one check, but anticipates to have the funds needed by the end of January. Will follow up in January to see where he stands.

Why is this a status update and not a service?

The above example does not show that the case manager provided a service to the participant. The case note is providing an update on the participant's employment and income status. There are no statements with action words explaining that the case manager provided some type of service such as providing counseling assistance.

Example #3:

Labor Market Information Services (Youth Only):

Carry-in working on obtaining GED and enrolling into NAC training for PY21.

Why is this a status update and not a service?

The above example does not show that the case manager provided a service to the participant. The case note is providing an update on the participant continuing their educational and career plan in the new program year. There are no statements with action words explaining that the case manager provided some type of service such as providing career counseling, career awareness, or career exploration services.

Examples of Case Notes that are a Service and Recorded Correctly in ETO

The following examples are actual case notes for qualifying services pulled from WIOA participants' files. These examples show instances where the case note does indicate a service was provided and was entered correctly as a service in ETO. The words or statements describing the service will be in **blue font** with the action word **underlined**. A brief explanation of why the case note indicates a service was provided to the participant will be given after the example.

Example #1:

Career & Vocational Counseling:

*Participant called to let me know that he is out of UI and had received some letter from them. He also said that he was told that he may have an overpayment. **I assisted with his UI** in hopes we can get this all cleared up. **I informed him that he may not be eligible for UI** as he received all he is entitled to and he did not lose his job due to COVID. **I also informed him that we can try for another training benefit to see if he will qualify.** **I assisted him in applying online** and he will now wait to see if he will get more UI. He will let me know if there is anything else he will need.*

How does this describe a service was provided?

The above example shows that counseling assistance was provided to the participant by describing the assistance that was given to the participant to help overcome current obstacles with UI and training benefits.

Example #2:

Career & Vocational Counseling:

*Counselor and participant **discussed** the progress she has been making in classes and what she is learning from the program. Counselor and participant also **talked** about her long-term career goals, which is to start a holistic health center in Kittitas County. Participant has begun talking with a Naturopathic doctor in the area who also sees this need in the community and has a similar goal. In the meantime, participant is getting ready to start working with clients one on one as part of her training program. Counselor will send business articles, refer her to any free classes or resources that will help her on her self-employment journey. No other needs at this time.*

How does this describe a service was provided?

The above example shows that counseling assistance was provided to the participant by describing the assistance that was given to the participant to help identify, define, and verbalize career goals and communicate accomplishments.

Example #3:

Labor Market Information Services (Youth Only):

*Met with participant, he mentions that he is no longer working at Conrad and Adams due to being laid off. He wants to find new employment and requested assistance for applying for employment again. **CM informed participant about taking career readiness classes to prepare him for new employment.** **CM explained how he would learn new skills which he would be able to use when employed.** **CM set up a meeting to do job search but encouraged him to consider attending classes as he will also get assistance with checking and revising his resume which would benefit him to having a better outcome in his job search.***

How does this describe a service was provided?

The above example shows that career counseling was provided to the participant by describing the career advice and support given to the participant to help attain employment.

Action Verbs to Use for Career & Vocational Counseling (CVC) or Labor Market Information Services (LMI)

The following list of action verbs are examples of words to include in the Career & Vocational Counseling or Labor Market Information Services case notes. Including these action words in the case notes will help define the service provided to the participant by describing the “action” taken during the interaction between the case manager and the participant. When a case note lacks actions words, it will read as a status update that was incorrectly entered as a service in ETO. This list is only an example of words that can be used in the case notes for Career & Vocational Counseling or Labor Market Information Services and is *not intended to be exhaustive*.

Service Description	Business Definitions for Services in ETO				
Career and Vocational Counseling (2.0)	Counseling assistance to participants in planning career or vocational paths, preparing for the job market, and identifying or creating steps that lead to employment. Expected outcome is to help participants identify, define and verbalize their career goals, overcome obstacles through WorkSource or other partner’s services, and articulate one’s skills and accomplishments. This counseling service can be delivered one-on-one or in a group setting.				
Labor Market Information Services (2.0) (Youth Only)	Services that provide labor market and employment information about in-demand local industry sectors or occupations, such as career awareness, career counseling, and career exploration services. Career awareness is gaining knowledge of careers, occupations, skill requirements, working conditions, training prerequisites, and job opportunities. Career counseling services include resume preparation information, interview skills, job shadowing opportunities, and long-term benefits of postsecondary education and training. Career exploration helps youth choose educational paths and training or jobs which fit their interests and skills. Career counseling or guidance provides advice and support in career path decisions.				
Action Verbs related to the definition for Career and Vocational Counseling or Labor Market Information Services:					
<ul style="list-style-type: none"> • Advised • Aided • Analyzed • Arranged • Assessed • Assisted • Assured • Clarified • Communicated • Conveyed • Coordinated • Counseled • Decided • Defined • Demonstrated • Described • Designed • Determined • Developed • Drafted • Discussed • Encouraged • Established • Evaluated • Examined • Explained • Explored • Expressed • Facilitated • Formed • Gathered • Guided • Helped • Identified • Informed • Interviewed • Motivated • Organized • Outlined • Planned • Provided • Questioned • Reinforced • Researched • Reviewed • Scheduled • Searched • Shared • Showed • Supported • Talked • Worked 					