

Case Notes Checklist

Do your case notes “read like a story”? If you just picked up this CSR folder, could you follow what has happened since this consumer first made contact with WOIL?

Do the dates of your CFAL entries match the contact sheet in the CSR folder? If you need assistance with this step, records room staff can assist you.

What **TYPE** of note is this? Below are some examples from CFAL, if you’re not sure which type to choose, please ask your supervisor.

Correspondence sent
Eligibility determined
General case note (default)
ILP declined
Group setting, etc, etc.

What is the correct **SERVICE** to choose from the drop down menu in CFAL for this particular note? These are offered as examples, if you’re still not sure, ask your supervisor.

Advocacy/Legal = accessibility issues, discrimination, divorce, etc

Assistive Devices = tools that help with activities of daily living, TFL, STAR

Children = services for a person ages 0-14, specialized day care, IEP support, services for consumer’s child

Communication = services that improve the consumer’s ability to take in or put out information

Counseling and Related = providing counseling or referring to a different counselor for specialized services

Family = services or referrals related to consumers family issues

Housing/ Home Modification = services done inside the home such as door widening,

I&R Assistive Technology = Tools for Life, STAR network , etc.

I&R Health Care = referral to doctor or clinic

I&R Housing = inquiry about subsidized or accessible housing

I&R Transportation = inquiry about Paratransit, Logisticare, etc

IL Skills Training = work or other life skills and information about class time, location, type of classes available

Information and Referral = sharing local resources for service we don’t provide

Peer Counseling = active listening, sharing life experience, calling to ask how someone's doing, etc.

Personal Assistant Services = home health agency referral and follow up

Physical Rehabilitation = exercises, movement, range of motion

Preventive Services =

Prosthesis and other = services to obtain artificial arms, legs, teeth, eyes or other body part or fitting, repair, adjustments

Recreational = organized leisure activities or facilities

Rehabilitation Technology = developing or making a specific tool for a consumer, doing an assessment

Therapeutic Treatment = providing physical or occupational therapy activities

Transition = changing locations or lifestyle; from a nursing home or other institution back into community, from high school to college/work, etc.

Transportation = services that help a person get out of the home, Ramps, lifts, Para transit application, taxi, plane, adapted vans, etc.

Vocational =GPS or other work skills classes, VR

Youth = services to or for people age 14 to 24

Which **GRANT** should you choose? If you're not sure, please ask your supervisor