

Case Note Sample 1

Case Note Summary

Case Note ID:

Username:

User ID:

Name:

Case Note Details

Please check to suppress this Case Note

* Contact Date:

Case Note Type:

LWIA/Region:

Office Location:

Program:

App ID:

Partner Program:

Subject:

Contact Type:

Case Note Description:

Supportive Service: Transportation assistance needed to attend at the facility. Gas card number for \$25.00 was provided. See scanned item and file for supportive service.




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Case Note Sample 2

Case Note Summary

Case Note ID: [REDACTED]
Username: [REDACTED]
User ID: [REDACTED]
Name: [REDACTED]

Case Note Details

Please check to suppress this Case Note
* Contact Date: 01/18/2018  Today

Case Note Type: Enrollment
Type ID: 352489 
* LWIA/Region: CSB
* Office Location: [REDACTED]
* Program: Title I - Workforce Development (WIOA)
App ID: [REDACTED]
Partner Program: WIOA Title I Workforce Development
* Subject: 417, 481
Contact Type: None Selected

* Case Note Description:

case manager met with [REDACTED] and discussed job opportunities after completion of [REDACTED] received \$50 for working over 2 months.
case manager spent 2 hours with [REDACTED]



Case Note – 419 Group Activity

- Develop one exemplary sample case narrative with the work group
- Remember to use the:
 - What service was provided?
 - Why was the service provided?
 - How will the service benefit the customer?
- Key words to describe the delivery of service:
 - Directed
 - Advised
 - Recommended
- Case note should indicate the activity code entered
- 419 Activity Code – Incentive Payment: Youth participant received an incentive payment based on an incentive in recognition of the Youth's achievement directly tied to training activities, education and/or work experiences
- Providers must have written policies/procedures in place before the commencement of the program governing the award of incentives and must ensure such incentive payments are tied to the goals of the youth program. Are in accordance with the requirements contained in 2 CFR part 200



Case Note – 419 Group Activity, continued

- Such an incentive differs from a supportive service, as a supportive service may only be made when deemed necessary for a Youth to participate in program activities.

- Case Note #1: _____

- What documentation needs to be submitted with the Claim Reimbursement Form: _____



Case Note – 481 Group Activity

- Develop one exemplary sample case narrative with the work group
- Remember to use the:
 - What service was provided?
 - Why was the service provided?
 - How will the service benefit the customer?
- Key words to describe the delivery of service:
 - Directed
 - Advised
 - Recommended
- Case note should indicate the activity code entered
- 481 Activity Code – Supportive Service, Transportation Assistance: A Youth participant received assistance with transportation which enabled him/her to participate in activities authorized under WIOA Title IB



Case Note – 481 Group Activity, continued

- Case Note #1: _____

- What documentation needs to be submitted with the Claim Reimbursement Form: _____



Case Note – 487 Group Activity

- Develop one exemplary sample case narrative with the work group.
- Remember to use the:
 - What service was provided?
 - Why was the service provided?
 - How will the service benefit the customer?
- Key words to describe the delivery of service:
 - Directed
 - Advised
 - Recommended
- Case note should indicate the activity code entered.
- 487 Activity Code – Supportive Service, Tools/Clothing: A Youth participant received assistance with employment-related attire or tools for the purpose of obtaining employment



Case Note – 487 Group Activity, continued

- Case Note #1: _____

- What documentation needs to be submitted with the Claim Reimbursement Form: _____

