# JOB AID: CASE NOTE GUIDE

**PURPOSE:** The **Notes** Job aid details best practices for note-taking in the CAT, CaMS and the Jobs Portal to support consistency and continuity of integrated case management between EO Service Providers and Social Assistance (SA) and to ensure alignment between both programs. At this time, there is no shared communication tool to allow joint case noting between EO and SA across both case management systems. The only information communicated at this time between **CaMS** and **SAMS** is the client's EAP. **Service Providers should document all notes regarding client activities that are relevant for SA in the EAP *"Comments"* section under the appropriate plan item.**

***Note:*** *Service Providers will use the Jobs Portal for daily case management activities for client service; however, SA Caseworkers will not have access to the Jobs Portal system. Service Providers must document all necessary information about client service required for effective ICM with SA in CaMS, even if this means duplication in some notes between CaMS and the Jobs Portal.*

## Subject, Location, Templates and Action

| Subject | Location | Template | Actions |
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| **COMMON ASSESSMENT** | | | |
| **CA Assigned to Caseworker** | Common Assessment: Notes Text Box Summary Page | **EO Caseworker Contact Information**<br>**Name:**<br>**Organization:**<br>**Contact Number & Ext:** | ▪ Using this template, add case note and details to the 'Notes Text Box' on the Summary page of the CA.<br>▪ SA caseworkers cannot see EO provider information once they refer a CA. This note should be added when a CA is assigned to an EO caseworker so the SA caseworker knows who to contact.<br>***Note: No additional notes are required to be documented in the CA unless there is a returned Referral.***<br>***All Contact attempts should be recorded in the Jobs Portal.*** |

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| **Returned CA Referral** | Common Assessment: Notes Text Box Summary Page | **RETURNED CA REFERRAL**<br>**Has case consultation been completed with SA worker?:** Yes / No/ N/A<br>**Reason for Returned Referral:** Unable to contact/Client Preference/Inappropriate Referral<br>**Contact details, dates and method (eg. phone, text, email)**:<br>**1st Contact Method Attempt:** Phone / Email / Text<br>**Contact Date:**<br>**Contact Result:**<br>**2nd Contact Method Attempt:** Phone / Email / Text<br>**Contact Date:**<br>**Contact Result:**<br>**3rd Contact Method Attempt:** Phone / Email / Text<br>**Contact Date:**<br>**Contact Result:** | ▪ Assign CA to SSM Navigate to CA Summary Page, add select SSM as Service Delivery Site.<br><br>***Note:*** *Service Providers should use this template to document details regarding a returned CA Referral. This template only needs to be input **once** and **only** after the 3rd contact attempt has been made and deemed unsuccessful.* |
| **JOBS PORTAL** | | | |
| **Client Contact Attempts** | Jobs Portal: Case Notes Tab | **Activity Type:** (select type that applies)<br><br>**Case Note Details:**<br><br>**Contact Method:** Phone / Email / Text<br>**Contact Date:**<br>**Contact Result:** | ▪ Once a referral (CA, TRF, RASP etc.) is received EO providers can use the template to document each contact attempt in the Jobs Portal under the 'Case Notes' tab.<br><br>***Note:*** *Service Standards: Service Providers must make a first contact attempt with the referred client **within 2 business days** of receiving the referral*<br><br>*Providers are expected to offer a **minimum of 2 appointments** to a* |

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| | | | *client (either virtual or in-person, collaboratively scheduled with the client at a time that meets their needs) and make a **minimum of 3 distinct contact attempts in the client's preferred manner** (either by phone, text, email, or letter) before considering a client to be non-responsive.* |
| **Transferring An Active EAP** | Jobs Portal: Case Notes Tab | **Activity Type:** Cases-File Transfer<br><br>**Details:**<br>**Client EAP reference#:**<br>**Date Transfer Requested:**<br>**Reason/Rationale:**<br>**Additional Notes:** | ▪ Using template, add case note and details under the 'Case Notes' tab in the Jobs Portal |
| **EAP Outcome** | Jobs Portal: Case Notes Tab | **Activity Type**: EAP-Outcome<br><br>**Case Note Details:**<br>**Outcome Start date:**<br>**Outcome:** Employed/ Unemployed<br>**Employer:**<br>**Job title:**<br>**Number of Hours:**<br>**Wage:** | ▪ Using template, add case note and details under the 'Case Notes' tab in the Jobs Portal |
| **EAP Status-Closed (Client Early Exit)** | Jobs Portal: Case Note Tab | **Activity Type**: EAP Status-Closed<br><br>**Case Note Details:**<br>**Case Status:** Closed<br>**Date File Closed:**<br>**Rationale:**<br>**Jobs Portal Account Archived:** Yes / No / N/A | ▪ Using template, add a case note and details under the 'Case Note' tab in the Jobs Portal (if/when a EAP closes early prior to pre-employment activities or the retention period being completed) |

| CaMS | | | |
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| **Employment Related Financial Supports (ERFS)- JOB SEEKER** | CaMS: Job Seeker Plan Items Rationale | **Item Requested:**<br>**Rationale/Needs (*eg. How is this related to their employment goals?):***<br>**Total Supports Client has received on current EAP:** | ▪ Add template/details in the comments section of the desired plan item.<br>***Note:*** *This action allows SA caseworkers (if client is in receipt of SA) to view these comments in SAMS* |
| **Employer Financial Supports** | CaMS: Employer Financial Plan Items Comments<br><br>(eg. *Job placements, Trials and Accommodations)* | **Agreement submitted for Review**: Yes / No<br>**Paystubs submitted for Review**: Yes / No | ▪ Add template/details in the comments section of the desired plan item.<br>***Note:*** *This action allows SA caseworkers (if client is in receipt of SA) to view these comments in SAMS* |
| **Attestation** | CaMs: EAP Outcomes and Checkpoints Add Attachments<br><br>*(eg. Attachment Description)* | **Have all attempts to retrieve this information from Employer/Client been made**: Yes/No<br>**Rationale:**<br>**Additional Documentation submitted:** | ▪ Navigate to Outcome Tab in client's EAP. Select the ellipses by the desired Outcome or Checkpoint to edit the record and/or add an attachment *(eg. Completed WREN Attestation Form or any other additional supporting information*) |