Guide for Writing Client Notes in eJAS

Client notes in eJAS are an important tool to document a BFET participant's activities and progress. Well documented, concise client notes tell the story of BFET participation from initial enrollment to final outcome. Effective client notes allow BFET partners and DSHS to easily track participant's goals, barriers, and progress in activities leading toward employment.

The participant's progress must be monitored and documented in eJAS monthly with at least one of the following types of client notes:

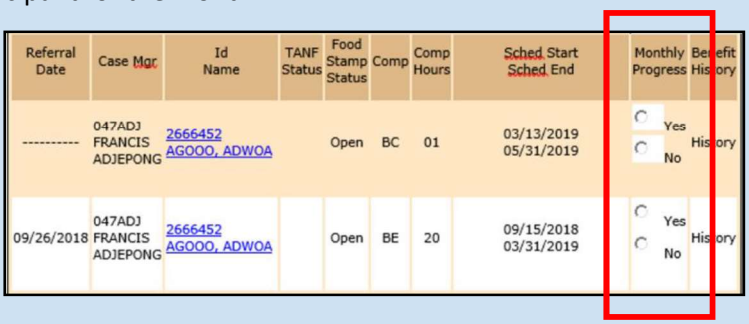
(1) Initial Client Note
(2) Ongoing Client Note
(3) Closing Client Note
(4) ABAWD Client Note

Review the BFET Provider's Handbook- Case Management: eJAS Case Note Documentation section for the full details and requirements for each type of note.

Tips for successful client notes:

#1. Enter your client notes by the end of the 3rd week of the month to avoid participants disappearing from your active caseload when Basic Food Assistance cases close.

#2. Use the monthly progress radio button on the caseload screen to track when a client note has been entered for that participant for the month.



Referral Date	Case Mgr	Id Name	TANF Status	Food Stamp Status	Comp	Comp Hours	Sched Start Sched End	Monthly Progress	Benefit History
----------	047ADJ FRANCIS ADJEPONG	2666452 AGOOO, ADWOA		Open	BC	01	03/13/2019 05/31/2019	Yes No	History
09/26/2018	047ADJ FRANCIS ADJEPONG	2666452 AGOOO, ADWOA		Open	BE	20	09/15/2018 03/31/2019	Yes No	History

#3. Review the audit results that the BFET Operations team sends each month and don't hesitate to ask questions or ask for examples of how to meet the requirements.

#4. Use the requirements in the BFET Provider's Handbook and the examples on the following pages to develop your own client note templates for each note type. Having a template as a guide can help make sure you include all of the required information in each client note.

Each month the BFET Field Operations team will audit a portion of the client notes to determine if they meet all requirements including the note type and content. DSHS will provide case note audit results monthly to the agency point of contact. Monthly eJAS case notes must maintain a monthly 95 percent accuracy rate. Connect with the BFET Field Operations team for any questions or concerns about the client note audits or results.

Initial Client Note is used in the 1st month of participation and must address the Employment Goal and the planned BFET activities to reach the goal.

Example 1. Chelsea is participating in BFET at Our Community College; she has completed her IEP and BFET orientation. She is confident in her career choice as Network Administrator and is pursuing an AAS degree in Computer Science/Network Administration. She anticipates finishing the degree in Spring Quarter 2021. She was reminded to check in monthly and was given information on campus resources such as tutoring center. She is currently enrolled in 15 credits for Fall Quarter.

Example 2. Completed BFET intake and assessment with client. He has the following barriers: limited English and limited transferrable job skills barriers. IEP will address these barriers as follows: Client will work with case manager 5 hours a week in supervised job search. Case manager will refer client to resources for further ESL classes. Short term goal is any job to pay expenses, long term employment goal is work in the medical field.

Example 3. Gary is enrolling in GED program and will participant in BE component for 15 hours per week. He wants to complete GED to open up job opportunities. He is unsure of his employment goal at this time and is open to most opportunities, but GED will be needed to qualify for most jobs.

Ongoing Client Note is entered at least once per month throughout the person's BFET participation. Address the participation and progress for all activities/components.

If it applies, also document: For JS component address how job search logs were received from client, information about the review of job logs, and follow up plans. Progress towards reaching individual goals, any changes in employment/education plan, reason for delay in progress and if unable to make contact, document the attempts to contact

Example 1. Mark completed 6 hours per week of JS and all check ins with CM for the month of July. Job search logs were completed and submitted weekly. CM reviewed logs with Mark and discussed follow up strategies, interview prep, and strategies to focus search through online postings.

Example 2. Alison's instructors report she is making satisfactory progress in Medical Administrative Assistant classes.

Example 3. Client attended Strategies for Success class on 11/5, 11/12, 11/19 and plans to attend on 11/26. Reports she is learning a lot of useful skills.

Example 4. John was in office today. Talked about resume/cover letter and is interested in creating a different resume that is more targeted toward each job he is applying for. Stated he will create a new resume and cover letter to new job positions and send a copy to us to review. Turned in Job Search Logs for weeks 09/15 09/30 for a total of 7 contacts. CM worked with client to create follow up contact plans for each employer.

Example 5. Deanna continues to participate in accounting program at Our College. Updated VE component to 23 hrs/week for Fall quarter.

Example 6. Jerry did not complete all required employer contacts for March. Jerry emailed CM reporting he was unable to complete any job applications the last 2 week due to illness.

Ongoing Client Note is entered at least once per month throughout the person's BFET participation. Address the participation and progress for all activities/components.

If it applies, also document: For JS component address how job search logs were received from client, information about the review of job logs, and follow up plans. Progress towards reaching individual goals, any changes in employment/education plan, reason for delay in progress and if unable to make contact, document the attempts to contact

Example 7. Michael's JS component has been extended out to 9/28. Cl has been completing JS hours but not at 5 contacts/week. Email has been sent to cl requesting missing JS logs. Also recommended Workshop starting on 9/10 to help with time management skills.

Example 8. Deon checked in for October via the BFET Canvas page. He shared that he has a solid budgeting plan in place to manage his finances while in school. He stated the first week of school has gone well and that he has been maintaining a regular schedule. No issues or concerns raised at check in.

Example 9. Annette checked in for October via the BFET Canvas module. She stated her courses are off to a 'good' start this quarter. Verified full time registration. Annette stated she is feeling like she has finances under control and she is teaching her children how to budget, too. She has required textbooks for the program and no concerns at this time.

Example 10. Kyle did not successfully complete Fall quarter classes. He struggled with math and English classes and did not pass the courses. He will re-take classes Winter quarter and will utilize tutoring services on campus.

Example 11. No progress report received for May; sent email reminder of requirement to check in with BFET program every month.

Example 12. Mary did not show up for our past 2 weekly meetings. Unable to determine progress in Supervised Job Search activities. I called and emailed after each scheduled meeting to check in and try to reschedule. Will continue to try to contact.

Closing Client Note is entered when BFET participation ends to document the outcome and explain why they are no longer a BFET participant.

*Example 1. Received notification that Mike has **moved to** Oregon and will not be participating in the BFET program. Closed JT component with IC incomplete code effective 10/1.*

Example 2. Closed JS component EE as client has permanent employment and is not in need of any further services.

Example 3. Closed VE component CS effective 12/19 Amber passed all of her courses successfully. Has not registered for Winter quarter. Called and emailed to attempt to reach her and update plans to continue in BFET program.

** Also review the BFET Provider's Handbook – Case Management: eJAS Case Note Documentation section for the requirements for each type of note.**

Specialized Notes

ABAWD Client Note: For ABAWDs not waived and participating in BFET require additional documentation about participation. The following elements must be included in the Ongoing Progress Note: Number of hours participated that month, Job Search hours must be specific unless your program is included in Workforce Innovation and Opportunity Act (WIOA), and any changes or barriers with participation must be clearly documented.

Example 1. ABAWD Participation: For the month of October Alan has participated 12 hours per week of BE activities for ESL classes, 2 hours per week of Life Skills, and 6 hours per week of Supervised Job Search. Total of 20 hours of participation for week ending 10/4, 20 hours 10/11, 20 hours 10/18 and anticipated 20 hours for week ending 10/25. Logs for Supervised Job Search were submitted weekly. Alan will continue to work on identifying jobs that fit his current skills.

Example 2. ABAWD Participation: Amber has been attending Strategies for Success classes along with GED classes. Weekly participation is 5 hours SL and 15 hours BE. For the month of June Amber had a total of 60 hours participation, missed 1 full week due to illness. Is back to regular attendance for both classes.

Tips for child care assistance: When a BFET participant is requesting help with childcare to participate in BFET activities you can help facilitate the child care eligibility determination and approval by documenting the following information in your eJAS notes:

- Activity (school, job search, job training, etc.)
- Hours of participation (ex: 32 hours per week)
- Exact days and times of the activity (ex: M-F 8 am – 5 pm)
- Travel time (ex: 1 hour before and after school for bus travel)
- Study time up to 10 hours per week allowed for child care (ex: student needs study time M-F 12 pm – 2 pm)
- Location of where online classes are completed (ex: online class is completed at the school library)

Example of Child Care Note: *Judy will be participating in the BFET program for Fall quarter 9/23 - 12/12. She is enrolled in the Business Technology program. Her class schedule requires 14 hours/week according to the following schedule: ACCT 113 MTWTh 10-10:50am, BTECH 131 MTWThF 1-1:50pm and CIS 125(a 5cr hybrid class meeting 4 times/qtr and 5 hrs/wk online, to be done in a college computer lab). Additional childcare time of 10 hours/week of study time and 5 hours/week of travel are requested.*