



Module 6: Client Notes

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Client Notes

Client notes in eJAS are the important tool used 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.

The client notes tell the “**who, what, why, where, when and how**” of the BFET participation.

Effective client notes allow BFET partners and DSHS to easily track a participant's goals, barriers and progress in activities leading toward employment.

BFET Provider's Handbook requires that the participant's progress must be monitored and documented in eJAS **monthly**.

Expected documentation includes the following:

- Progress in component activity.
- Changes in the IEP.
- Changes in activity.
- Participant reimbursements.
- For BK: Supervised Job Search logs, including activities completed, receipt of monthly Job Search Log and how, and steps taken to obtain when not received monthly.

Monthly eJAS case notes must maintain a 95% accuracy rate.

Client notes will be audited monthly by the BFET Field Operations team. A report with results and feedback will be sent monthly as well.

Client Note Types

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

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

Details for all client-note requirements can be found in the BFET Provider's Handbook's Case Management: eJAS Case Note Documentation section.

The BFET Provider Resource website also has a "[Guide to Writing Client Notes](#)" with several examples.

Client Note Types – Initial Client Note

When: entered in the initial month of participation.

Include employment goal and BFET activities planned to help the participant reach that goal.

Note: If a participant is in an educational program, it is important to document both the educational program and the specific employment goal.

Example 1. *Chelsea is participating in BFET at Our Community College; participant has completed IEP and BFET orientation. They are confident in their career choice as network administrator and pursuing an AAS degree in computer science/network administration. Chelsea anticipates finishing the degree in spring quarter, 2024. They were reminded to check in monthly and given information on campus resources such as the tutoring center. Chelsea is currently enrolled in 15 credits for fall quarter.*

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

Client Note Types – Ongoing Client Note

When: at least once per month.

Include the participant's monthly activities and address the following applicable elements:

- Participant's progress in the BFET activity.
 - If in BK comp, address how job search logs were received from client, information about the review of job logs, and follow-up plans.
- Progress toward reaching individual goals.
- Any changes in employment or education plan.
- Reason for delay in progress.
- If unable to make contact, document the attempts to contact, loss of contact and unable to assess progress.

Note: Address all components and activities.

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

Example 2. Deanna continues to participate in the accounting program at Our College. Updated BG component to 23 hours/week for fall quarter.

Example 3. Michael's BK component has been extended to Sept. 28. Participant submitted job logs in person. Client has been completing BK hours but not at least three contacts per week. Email has been sent to request missing BK logs. Also opened SL component for Workshop starting Sept. 10 to help with time management skills.

Example 4. Kyle did not successfully complete fall quarter classes. They struggled with math and English classes and did not pass the courses. Kyle will retake classes in winter quarter and will use tutoring services on campus.

Example 5. No progress report received for May; sent email reminder of requirement to check in with BFET program every month.

Client Note Types – Closing Client Note

When: BFET participation ends when all components are closed.

Include the **outcome** and explain **why the participant is no longer in BFET**.

Example 1. *Received notification Alex has moved to Oregon and will not be participating in the BFET program. Closed BL component with IC - incomplete code effective Oct. 1.*

Example 2. *Closed BK component with EE as client has permanent employment and is not in need of any further services. Verified employment by phone call to employer and updated employment info screen.*

Example 3. *Closed BG component with CS effective Dec. 19. Amber passed all courses successfully. They have not registered for winter quarter. I called and emailed in attempt to reach them and update plans to continue in BFET program.*

Client Note Types – ABAWD Client Note

When: ABAWDs not waived and participating in BFET to meet ABAWD requirements need additional documentation about participation.

Include the following elements in the Ongoing Progress note:

- Number of hours participated in that month.
- Job search hours must be specific unless your program is included in WIOA.
- Any changes or barriers with participation must be clearly documented.

Example 1. *ABAWD participation: For the month of October, Alan has participated in 15 hours per week of BB activities for ESL classes, two hours per week of life skills and six hours per week of supervised job search. Total of 23 hours of participation for week ending Oct. 4, 23 hours Oct. 11, 23 hours Oct. 18 and anticipated 23 hours for week ending Oct. 25. Logs for supervised job search were submitted weekly in person. Alan will continue to work on identifying jobs that fit their current skills.*

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

Client Note Types – Childcare Note

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

Activity (school, job search, job training, etc.).

Hours of participation (e.g., 32 hours per week).

Exact days and times of the activity.

Travel time needed to get to activity.

Study time up to 10 hours per week allowed for childcare.

Location where online classes are completed.

Childcare notes are not a BFET program requirement but can be very helpful for your participants.

Example: *Judy will participate in the BFET program for fall quarter Sept. 23 – Dec. 12 and is enrolled in the Business Technology program. Class schedule requires 14 hours/week according to the following schedule: ACCT 113 MTWTh 10-10:50 a.m., BTECH 131 MTWThF 1-1:50 p.m. and CIS 125 (a five-credit hybrid class meeting four times/quarter and five hours/week online, to be done in a college computer lab). Additional childcare time of 10 hours/week of study time and five hours/week of travel are requested.*

Entering Client Notes

Steps for Entering a Client Note in eJAS

1. From the Client screen, click the **Client Notes** link.

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[Home](#) [Help](#)

Name	JAS Id	ACES Id	Reg	CSO	Pgm	AU	Telephone
CHEERIOS, YUM	2756085	2756085	3	034	\$	004582972	
Two Parent :		Required Part? :		LEP :		EA :	
				aces online		Email ID:	
HOH :		Total: 000		Recip: 000		Inelig: 000	
TANF :		BFA: Open		RCA:		Sngl Parent W/Child(ren) < 6 : No	
						Refugee Months:	

[Click here to view Workers associated with this Client.](#)

[E&T Component Information](#)
[Employment Information](#)
[Client Notes](#)
[Payments](#)
[Strategies For Success](#)
[Commerce Program Plans](#)

[WFR](#)
[Adhoc Reporting](#)
[Referrals](#)

[Client Monthly Participation](#)

[Letters](#)

Entering Client Notes

Select the “Add New JAS Notes” button.

Select Note Type(s)

☒ Ongoing Observation

Pick types to Create and click Begin Notes

☐ Admin/ Support Svcs

☐ Batch Cancellation

☐ Child Care

☐ Child Welfare

☐ Comprehensive Evaluation General

☐ Disability Lifeline

☐ Equal Access Plan

☐ First Contact Date

☐ Individual Employment Plan Develop

☐ Legal

☐ Mileage Reimbursement

☐ NCS Reinstatement

☐ Post Job Search Review

☐ Refugee Employment Referral

☐ Strategies for Success

☐ Voucher Authorized

☐ Voucher Payment

☐ Adult Dependent Care

☐ Bulk Client Attribution

☐ Child General Health

☐ Children w/Special Needs

☐ Continuous Activity Planning

☐ Eligibility Determination

☐ Family Planning

☐ Home Visit

☐ Job Search Results

☐ Literacy/Learning

☐ Money Mgmt/Protective Payee

☐ Other Agency/Tribal

☐ Pregnancy/Parenting

☐ Refugee Employment Screening

☐ Time Limit

☐ Voucher Cancelled

☐ Adult General Health

☒ Case Review

☐ Child Support

☐ Clothing/Hygiene

☐ Customer Contact

☐ Employment

☐ Family Support

☐ Housing

☐ Learning Needs

☐ LEP

☐ NCS Re-engagement


☐ Participation

☐ Progress

☐ Sanction

☐ Transportation

☐ Voucher Modified

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JAS Notes

[Open General Search Options](#) [Note/CE/Assessment Search](#)

Notes

3

Select a note type and click “Begin Notes.”

The “note type” on this list does not matter for BFET, but you must select one.

The most common selections are Case Review and Admin/Support Services.

Entering Client Notes

Skip

Save and Continue with Note List

Note Category:

Ongoing Observation

Note Type:

Case Review

Note Text:(3800 Characters)

Spell ✓

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Enter the information required for an Initial Client note, Ongoing Client note or Closing Client note.

Be sure to address activities for **all** components.

Skip

Save and Continue with Note List

← 5

****Note**** All eJAS Users can read BFET notes.

You must **not** enter any eJAS case notes with confidential or sensitive information about chemical dependency, mental health, family violence or HIV/AIDS/STD.

If an eJAS case note is entered into the wrong client's file, or with incorrect information please put in a note correcting the information in eJAS. If the note contains confidential or sensitive information, submit a request to delete the note to the BFET Operation's team through eJAS e-message with a reason for the deletion.

Client Notes – Best Practices

- Update Client Notes with each participant interaction.
- Enter before the end of the third week of the month.
 - The DSHS system for Basic Food updates the third weekend of the month and will begin to close cases if a review was due and not yet completed. This will make affected clients “disappear” from the active caseload.
 - The participants that “disappear” can always be found on the BFET Contractor Historical Report.

Client Notes – Best Practices

- Create a template for entering your client notes to help ensure you include all the required information.
- Documenting the employment goal is required in initial notes.
 - For best practice, document a short-term and long-term employment goal.
 - Be very specific in the employment goal.

Client Notes – Best Practices

- Use “Monthly Progress” radio buttons to mark and track a client note entry.

Basic Food E&T Contractor Caseload

ZXZ-BFET & CONTRACTOR Model: BFET Number of Clients: 0003

Caseload Month Year(mm/yyyy)

Name Search		Id Search		CSO Search		Component Search	
First:	Last:	Id:		CSO:		Component:	
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	
<input type="button" value="Find"/>							

[BFET Contractor Historical Report](#)

Referral Date	Case Mgr	Id Name	TANF Status	Food Stamp Status	Comp	Comp Hours	Sched Start Sched End	Monthly Progress	Benefit History
10/09/2020	034SFO SHEILA FOWLER	2756085 CHEERIOS, YUM		Open	JS	20	09/01/2020 10/31/2020	<input type="radio"/> Yes <input type="radio"/> No	History
-----	047ADJ FRANCIS ADJEPONG	2860063 MORNING, MONDAY		Open	JS	03	11/04/2020 02/02/2021	<input checked="" type="radio"/> Yes <input type="radio"/> No	History
-----	**** 080CSO UNKNOWN *****	2730159 PROD, COPY0859265		Open	SL	05	10/29/2020 01/26/2021	<input type="radio"/> Yes <input type="radio"/> No	History

This tool provides a quick way to scan your Caseload screen to verify each participant has a note entered for the month to meet requirements.

When you select the “yes” radio button, a note entry screen will open.

Note Creation

Jas Id:2730159 PROD, COPY0859265

Note Category: Ongoing Observation
Note Type: Progress

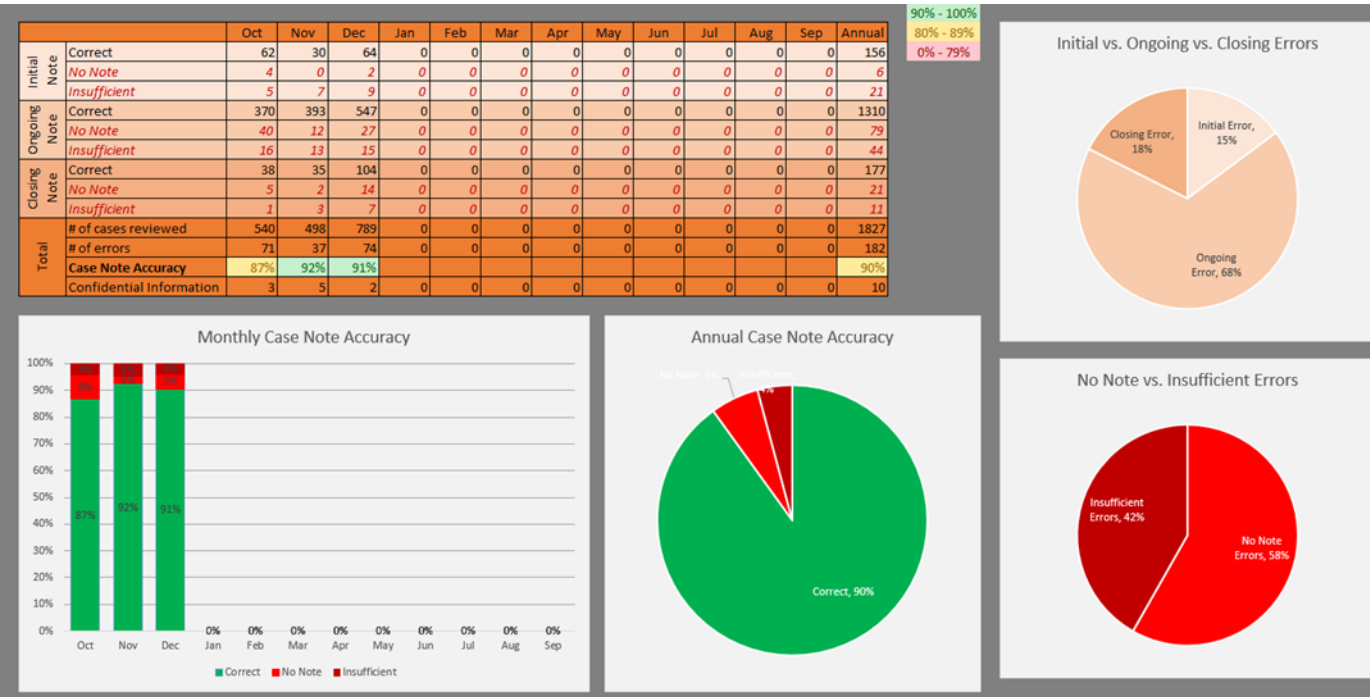
Note Text (58 lines)

After entering your note and selecting “Save Note,” the radio button will stay marked for the rest of the month.

Client Note Audits

- Each month the BFET Field Operations team will audit 15% of your monthly caseload for client-note accuracy.
 - *If your agency has three consecutive months of +95% accuracy, we will reduce the audit to 10% of the caseload.*
- The audit is to ensure the monthly client notes meet all requirements, including the note type and content.
- Once the audits are complete, we will create and send a report with results and feedback.

Client Note Audit Report



The case audit report is an Excel workbook that will be emailed to your agency monthly.

The report includes a Case Note page, which shows monthly and annual totals for each note type and error type. It also shows the monthly and annual accuracy rate.

A second Excel workbook, called Case Audit Log, shows the name and ID of each case audited, audit finding and comments. Some providers will receive Case Audit Log inside the Case Audit Report.

Name	JAS ID	Outcome	Notes
Morning, Monday	2860063	Correct	
Prod, Copy0934085	8110178	Error	Closed BK comp with LC code which is incorrect. LC – Loss of Contact means a loss of contact with the participant for at least 60 days. Correct code is IC. IC – Incomplete means the participant did not complete the activity by the scheduled end date. *BFA closed 12/31/2022*

Please contact the BFET Operations team for any questions or concerns about the client note audits or results.

Questions?

For any eJAS-related questions or for assistance, please don't hesitate to contact your assigned BFET Operations team member or send us an e-message in eJAS.

