

1.6 Required Documentation

Revised [July 1, 2021](#)

1.6.3 When and where to document?

Whenever there is an interaction with the participant or on behalf of a participant, the WFPS/WFSSS must document the issues, needs, and actions taken, timely. When working with a two-parent household, document participation discussions with both parties as necessary to develop their Individual Responsibility Plans (IRPs). Be descriptive and document interactions with the participant or other parties involved in their WorkFirst participation, deferral, or exemption. Also, document any time action is taken on their case. Some examples include:

- In-person or phone conversations
- During/after the Comprehensive Evaluation and Assessment
- Case staffings
- Referrals
- Support service requests
- Receipt of email from the participant or a provider
- Interactions with an AREP, caregiver, or Power of Attorney
- Interactions with a provider, contractor, or partner
- Contact with landlords or vendors
- Scheduling or mailing correspondence

The type of interaction with the participant determines where to document:

- eJAS Client Notes for most contacts
 - Select the **Case Notes** type that best captures the contact
- Comprehensive Evaluation (CE) tool
 - See WFHB section [3.2.1](#) for more information on creating the CE
- Social Services Assessments
 - See WFHB section [6.2](#) for more information on creating an assessment
- Individual Responsibility Plans (IRP)
 - See WFHB section [3.3.1](#) for expectations in IRP
- Case Staffing/Extension Review
- Sanction Review
- [Sanction Re-Engagement Summary Page](#)
- Time Limit Extension tool

- Referral
- **Confidential Note Types** are crucial to protect the participant's privacy, as well as, adhere to state and federal confidentiality laws for substance abuse, mental health needs and domestic violence. When adding personal/private information into the data systems, staff must follow a "do no harm" approach. See WFHB section [3.7.2.4](#) for instructions on how to have confidential notes removed from a non-protected note type(s).

Note: Do no harm means; not putting people's safety in jeopardy, always use a confidential note type when documenting the following notes; domestic violence, mental health, substance abuse, and protected health information such as HIV.