

# Case Notes

1

Conduct a Pre-Interview Case Review

2

Enter Case Notes During Interview

3

Address all Factors of Eligibility

4

Clarify and Record All Discrepancies

5

Document Only What is Necessary

6

Include Enough Information to Support Action Taken

7

Be clear and Concise so Others Understand

8

Document every interaction with the client

Case note documentation allows for quick access to information previously entered, providing an accurate record of exactly what happened and when. Proper case note documentation is a critical step to help ensure SNAP accuracy



Adult and Family Services

<b>Inputs</b>	<b>Components</b>	<b>Criteria</b>	<b>Considerations</b>
Pre-Interview Case Review	Conducting a pre-interview case review allows the worker to make immediate connections between the client's past and present circumstances, resulting in a more exploratory interview.	Is familiar with household and client employment status? <ol style="list-style-type: none"> <li>1. Asked clarifying questions</li> <li>2. Talked about data exchange discrepancies</li> <li>3. Seem informed about client's case</li> </ol>	Did the employee use a pre-interview checklist? Was it updated? Was it helpful? How long did the worker take to accomplish this step? <p>Does the employee have ideas to improve?</p> <p>Which screens did the employee review before the interview?</p>
Address All Factors of Eligibility	For there to be adequate documentation to support the action taken on the case and avoid errors, all factors of eligibility must be fully addressed.	Information entered for each of the following tabs: <ol style="list-style-type: none"> <li>1. Case Info</li> <li>2. Household</li> <li>3. Income</li> <li>4. ABAWD</li> <li>5. Expenses</li> <li>6. Shelter</li> </ol>	Were there any questions left unanswered regarding a component of eligibility? <p>Are any anomalies on pay stubs explained?</p> <p>Is there enough information to support the action taken on the case?</p>
Be Clear and Concise	Anyone looking at the case should be able to clearly understand the comments in case notes. Unnecessary information is not included.	Mostly free of typos, misspellings, and major grammar mistakes. <p>Formatting is simple and easy to follow.</p> <p>Punctuation is used as necessary to separate sentences.</p>	Does a sentence have to be re-read multiple times to make sense of what was written? <p>Were any updates to the original case note noted with the date new information was reported?</p>
Clarify and Record All Discrepancies	Clarifying discrepancies leaves no room for speculation about which information is accurate.	Any discrepancies between information found in the case file or reported by the client and the elements used by the worker should be explained. Explain any contradictions that exist among verifications.	Does the information on the case match what was reported on the application and what is showing on verification? If not, is there clarification in case notes? <p>Are all data exchange discrepancies addressed?</p>