

# The Mississippi Partnership Case Notes Guidelines For WIOA Youth Participants

The purpose of these guidelines is to provide guidance to WIOA staff in The Mississippi Partnership Workforce Area on case notes for WIOA Youth Participants.

There is an important connection between case notes and serving WIOA youth participants during all phases of the youth program. The MS Partnership is required to maintain accurate participant records and validated participant data. Case notes are a key part of the youth participant file and must be maintained electronically in MS Works.

Case notes describe the plans, activities, actions, and results of services provided to youth. Accuracy and completeness in case notes is critical. Case notes are used by WIOA staff as planning tools for youth participants, and Fiscal Agent Staff, WIOA State, and Federal staff for monitoring and data validation. Someone with no contact with the participant should be able to read the case notes and get an accurate picture of the situation/circumstances being documented. **Case notes must be consistent with the documentation in the participant's Imaging File.**

Case notes are a very important aspect of working with WIOA youth; youth provider staff are required to update case notes at every point of contact with the youth participants. Case notes provide history of services for the youth participant and tell a complete story from start to finish while enrolled in WIOA and through the 12 months of follow-up. All Mississippi Partnership Youth Providers should follow these guidelines for creating and maintaining case notes.

## A. General Case Note Content

1. For WIOA Youth Participants enrolled on or after July 1, 2022, case notes for youth participants will be maintained in MS Works.
2. Case notes should be entered within five business days from the event, contact, contact attempt, etc.
3. Case notes should always be factual and not reflect personal opinions.
4. Use clear, simple, concise language when writing case notes. Avoid using abbreviations.
5. Case notes may state a medical condition or disability exists but cannot provide information describing the condition.
6. Case notes must always be professional. They are a potential legal document and may be used as evidence in court.
7. Youth should have at a minimum monthly case notes from the time they are enrolled into the program until they complete the 12 months of follow-up.

## **B. Initial Case Note (Eligibility and Enrollment)**

This case note is critical as it documents enrollment into the WIOA youth program. This case note should provide sufficient detail to assist other staff and monitors in understanding why the youth was enrolled into the program. Items at a minimum that should be included in the Initial Case Note include:

1. If the youth is an in-school or out-of-school youth
2. Include if the youth is low-income
3. Include the youth's family size
4. If the youth is living in a high poverty county, include this in the case note
5. Include the eligibility category of the youth (example: high school dropout, pregnant/parenting, foster child, offender, requires additional assistance, etc.)
6. Indicate if the youth is basic skills deficient and this was determined
7. Indicate if the youth is currently employed or unemployed
8. Explain why the youth is being enrolled into WIOA
9. Indicate if an ISS was created for the youth participant
10. Detail next steps that will occur

## **C. Youth Services Case Notes**

Case notes should be entered providing details about the services the youth is receiving while in the program, this includes all of the youth 14 program elements. Below are examples of things that should be included in the case notes for certain youth services:

### **1. Work Experience**

If a youth participant receives work experience (WEX), you should enter a case note that contains the following minimum information:

- a. Worksite where the WEX activity will take place
- b. Job title for the WEX job
- c. Anticipated duration of the WEX
- d. Hourly wage

While the youth is in WEX, you should enter case notes during the duration of WEX:

- a. Documenting the youth's progression in work experience, including hours worked
- b. Feedback from the worksite on the youth's WEX performance
- c. Any change in WEX – including duration, hourly wage, etc.

### **2. Supportive Services**

If a youth participant receives supportive services, you should enter a case note that includes:

- a. The specific supportive services that is needed
- b. The barrier the supportive services will resolve
- c. The lack of assistance available from other entities
- d. The participant's inability to pay for the item

### **3. Incentive Payments**

If a youth participant receives an incentive, you should enter a case note that contains at a minimum the following information:

- a. The specific achievement received to be eligible for the payment
- b. The amount of the payment
- c. How the payment was made

### **D. Youth Exit**

When a youth has completed the WIOA youth program and you are ready to exit the youth from your program, you should enter a case note detailing what services

### **E. Youth Follow-Up**

At a minimum, youth should be contacted monthly and offered any needed follow-up services. While in follow-up, the youth provider should update any information in MS Works (such as employment history, academic history, and program outcome forms) as needed. Case notes should detail the monthly contacts, specific services provided, and any pertinent information that was updated.