Case Counselor Training:

Case Notes

Quiz for Case Notes Module



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1. Of the following people, which is NOT likely to be reading Case Notes
2. A colleague who is also serving the customer.
3. A supervisor at the AJC.
4. A local prosecutor.
5. A program monitor.
6. Which is the best example of writing in the “active voice”?
7. A resume was dropped off by Mary and she used the resource room.
8. Mary dropped off her updated resume and used the resource room.
9. After a visit by the hiring manager of Alcoa, an interview was arranged for Jim.
10. Before the deadline, we were able to submit an application for Brad.
11. Which of the following does not represent an assessment?
12. Program eligibility.
13. Financial stability details.
14. A college transcript.
15. Job readiness.
16. Basic skills.
17. When should you include your professional opinions in case notes?
18. When they relate to a customer’s political views.
19. Never.
20. When they are directly relevant to your customer’s progress.
21. Your notes are always expressing your personal opinion.
22. When is the ideal time to enter your case notes into the electronic MIS system?
23. Before the close of business on the Friday of the week you met your customer.
24. Immediately after meeting with the customer.
25. First thing in the morning the day after meeting the customer.
26. Before leaving the office on the day you met your customer.
27. Which of the following best describes a customer’s situation and background?
28. Jenny arrived 10 minutes late for our appointment.
29. Errol is focusing his job search on occupations in manufacturing.
30. We will refer Kathy to the SNAP specialist for food assistance.
31. John’s resume does not mention the credential he earned.
32. Which of the following is the least important characteristic of effective note taking?
33. Notes should be understandable and written in common English language.
34. Notes should reflect some sequence of events that describe the customer’s progress.
35. Notes should never include acronyms.
36. Notes should include the reason for the customer’s visit.
37. Notes should be understandable to all readers besides the case counselor.
38. One of the best ways to organize a meeting between the case counselor and the customer is to:
39. Make sure the customer has your business card.
40. Establish an agenda beforehand that includes goals and/or expectations.
41. Offer the customer privacy so they can discuss any subject they want.
42. Follow the same structure at every meeting.
43. Which of the following is directly related to the progress a customer is making?
44. They are engaged in their job search.
45. They are networking with new and previous contacts.
46. They had a death in the family.
47. They don’t always dress professionally.
48. They have a positive attitude.
49. Which of the following statements is not true?
50. At every engagement with the customer, you should set goals and expectations.
51. You should only report significant contact with the customer in your case notes.
52. Case notes should not have intake information already captured by the MIS system.
53. Each case note entry should include the full name of the customer.
54. Since my customer will not be reading my case notes and since they are primarily for my benefit, this is not considered “shared data.”
55. True.
56. False.
57. In almost all circumstances, specificity is key. This includes reporting a customer’s specific medical condition. It is better not to leave it to interpretation.
58. True.
59. False.

Answers and “trick” questions that need interpretation by your program representative:

1. “c” A local prosecutor is not likely to inspect your notes. But case note could potentially become part of a court case.
2. “b”
3. “c” The other choices are used to assess a customer’s situation and eligibility.
4. “c” The emphasis is that professional opinions are always used; personal opinions are avoided.
5. “b” Use common sense to determine the best and soonest time to record notes.
6. “b” This choice provides information about a customer’s background.
7. “c” You should avoid acronyms but, sometimes they are acceptable. Check with your supervisor.
8. “b”
9. “a”, “b”, and “e” are the best answers. A death may be significant but not directly related. Dressing professionally may be significant but customers may choose to dress professionally at their interviews with employers and not necessarily at their meetings at the AJC. The “d” answer is therefore open for interpretation.
10. Technically, none of these choices are good. You don’t always set goals at every meeting; you should report significant contact with customer but maybe not exclusively; case notes may repeat information that is also entered into MIS system if that information is important to telling their story; you don’t HAVE to write out their full name every time. “Customer, Mr. (insert name here)” is sufficient. It may be all right to just write their initials.
11. False: case notes are shared data. Your colleagues, your supervisors, your funders and others may be authorized to read your case notes.
12. False: you can mention that your customer has a medical condition that affects his or her ability to function, but you should almost never record their specific condition.

Jobs for the Future (JFF) completed this project with federal funds awarded to Maher & Maher under contract number DOLQ131A22098 DOL‐ETA‐14‐U‐00011, from the U.S. Department of Labor, Employment and Training Administration. The contents of this publication do not necessarily reflect the views or policies of the Department of Labor, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government