Writing an Effective Case Note in OSOS

In OSOS, case notes can be added to a customer record by clicking on the Comments Button of any tab in the Customer Detail Window and can be viewed in the Comments Tab. Case notes should be added to a customer record for each interaction you have with a customer. You will find it helpful to record good case notes in OSOS for tracking a customer's progress at each point in their employment services process. Since multiple agencies and staff members may be working with the same customer, it is essential to write thoughtful case notes that provide a thorough and objective overview of the customer that everyone can reference and utilize. For case notes to be effective, they should make **SENSE:**

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- **Situation**
- The first step in writing a case note is to assess the customer's situation. Where is the customer on his or her path to training or employment goals? What is the reason the customer has come in today? Also, add any relevant information that should be noted which is not collected anywhere else in OSOS (e.g., if a customer discloses Disability Status, you would note in Comments any regular workplace/training accommodations). You would also note any updated employment services information such as job search or training progress, job leads, etc.

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- **Evaluation**
- Next, you will want to provide a professional evaluation of your customer's current situation. What happened during your meeting? Were the meeting goals accomplished? If not, why? Be sure to outline your assessment, any results and interpretation of these results. Make a note of any new employment barriers your customer is facing.

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- **Next Steps**
- The Next Steps part of the case note is where you will explain what you and your customer will do as a result of this meeting. You may want to set goals for what you both hope to accomplish by the next meeting and schedule a follow-up meeting if needed. This should follow logically from the customer's situation and your professional evaluation.

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- **Sufficient Information (Say What You See)**
- After completing your case notes in an objective manner, take a moment to review it to see that you have included enough information. Assume that your case notes will be referenced by another staff member working with the customer. Will the information you provided be helpful enough? Did you record pertinent details of what happened and what was accomplished, as well as your reasoning for any services provided and any suggestions or goals you have set? *Remember, record only observable behavior, not any personal impressions.

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- **Employment-Related Information Only**
- Take care to enter only facts and relevant information related to the customer's training and employment goals. You should not include any unrelated information, protected health information (PHI) or any subjective personal opinions.