

# **5.27.26 (Public) Slide Deck - Creating High-Quality Case Management Documentation**

27 May - 02 Jun 2026

Poll results

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## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

(1/8)

- Use a private area to talk so that she doesn't worry about others hearing what is being talked about
- To track progress
- Safe space and support
- Provide better service and focus in what the participant really needs
- Safe space
- Confidentiality
- Make them feel safe
- Essential services continue if staff changes
- Make sure to explain in a way that makes her comfortable and build confidence
- By documenting everything it also helps her if she forgets anything or wants information or wants to reference something
- Write, read out and translate if needed your case notes with her and let her know that it's for her own benefit so we can serve her better. Ensure she understands they are always confidential
- The information is

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

064

(2/8)

- private and protected.
- Hello Blessing, thank you for expressing your concerns they are valid. I just want to explain to you the importance of having these notes to document our meetings and your goals. They are kept confidential and the notes will be read to you in case I am missing anything from your end.
- Confidentially policy
- Building confidence and make they feel safe
- Offer support with learning to read
- Reassure her that this is to help Her and help her achieve her goals and make sure we are helping her abd giving her the needed services
- Seek to understand what specific fears she has
- active listening and confirming her concerns, while also sharing that it is to protect her case and making sure she is getting all the services she needs.

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

064

(3/8)

- Confidentiality and safety
- if possible have a previous client available from her country to verify that it is a trustworthy situation
- Building a trust from the beginning and ensuring her that all this information is for the type of Cano, not to harm her in any shape or form
- We will only use this information to help you
- “Documentation is important and sometimes required to receive external services - such as snap.”
- Everything is confidential. We will not share anything unless she agree to it
- Assure her she and her care team (and no one else) can have open access to go through them whenever she wants
- Information
- Confidentiality and build up trust
- Explain how services works
- In order to best assist her, we have

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

0 6 4

(4/8)

- to keep note of her needs and where she stands. Reading them to her after can make her feel more comfortable
- Explain importance in case notes allowing her providers to give proper care and ensure to read them and explain them before submitting
- Confidential policy
- It helps track your progress and services.
- Explain what details will make it into the note.
- Could be general info and not word by word
- Explain that she has the choice to engage in services. Also explain this will only be shared if it would harm herself or others and otherwise confidential. Explain this is written in third person without writing her name in the note
- Explain the confidentiality and the rights and responsibilities
- Information confidential
- Promise to send the notes to her

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

064

(5/8)

- personally, so she can translate/edit it
- I need to document what we work on to effectively help you. I can case note after the appointment if you aren't comfortable with me case noting during it
- "I completely understand your concerns, this will all be kept confidential and is only used for us to ensure the services are being provided and your goals are met, I can always look through the case notes with you"
- We will read everything aloud to her and use an interpreter
- Outline her access and the parameters of use
- Documentations keeps me up to providing adequate services that brings you to your desired goals
- Important to document her needs and offer to review case notes. Confidentiality.
- This is something that we do with all clients to ensure everything is

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

064

(6/8)

- working to support her goal and her info will not be shared publicly.
- Our conversation is confidential just for our program use and to be able to support you better.
- Shows your progress and concerns
- Let her know that this agency policy, so please understand why I am doing this.
- Confidential
- Let her know that her information is confidential
- Translate to her and explain it's confidential
- Reviewing together the progress and goals
- Explain it's confidential and to ensure quality of her services
- Make sure she feels safe
- Show her the case note and read it together
- I am willing to have her present while writing notes. Assure her that they're confidential, and explain the importance of

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

064

(7/8)

keeping notes to ensure that I can follow through and keep an accurate log of what goals she accomplishes.

- We won't share to people outside the organization
- Everything written down, is only what we discuss about during our meetings and confidential & reading it together
- Letting her know the privacy rights, I will only keep notes that help me help you
- If agency policy allows,

offer her a copy to have an interpreter read to her.

- Information kept confidential
- Emphasizing confidentiality
- For Services and support
- I will explain right responsibly
- Let her know her information will be confidential and will only be seen by a very small Number of people
- I would explain importance of taking notes and reassure that her information will remain confidential

## What might you say to Blessing to convey the importance of case documentation while still being sensitive to her concerns?

(8/8)

- Confidential policy
- Her information will kept confidential,
- Explain about confidentiality and need to document for the record
- Promise to read out your case notes so she'll understand
- I would explain that everything is confidential we don't share this with third parties.
- Everything I will document is confidential
- Her information would be kept confidential.

## How might you make this a more effective case note?

050

(1/4)

- When was the last payment? When did the client last work?
- Use an agenda and write short note about the interaction and next steps
- Explain date, time, reason for assistance, follow up items, and ending with who wrote the Cn with initial
- Translation
- What previous help has the CM given with rent/housing
- Client's barrier
- Could doing a budget work?
- Include more details
- List your name, date and time What has been provided so far
- Location of meeting?
- Highlight the main points
- Actions taken
- Lack of trust
- What do we need to do next?
- To be dated in a chronological order covering the 8 Ws with sufficient details
- Task the other members team needs to work with the client
- Next steps and next meeting date

## How might you make this a more effective case note?

050

(2/4)

- Details
- Location
- Why is the client having trouble with rent?
- When, Where, Why
- Barriers
- More specifics
- Thank you is unnecessary
- Next step
- Next steps for client
- are there any other needs ?
- Did the monthly budget change?  
Are there new expenses, loss of income?
- Include name, date & time, what's next
- Services provided
- Need documentations for eligibility
- Discussed where? In person or on phone?
- What resources is CM going to look into.
- Where, who was present? Follow up?
- The contact language
- Document everything with date and time
- The why

## How might you make this a more effective case note?

050

(3/4)

- Where did it take place?
- Scheduled?
- Reason is missing
- Add a time line for when they will follow up.
- Spell everything out and add more details of what specific resources you plan to check out, location and what barriers might have cause the hard time
- Describe specific steps that can happen next
- Definitely date and time
- Follow up plans
- More details better
- Include when the client expressed her concern and where
- Why needed
- Details
- Document date and time
- Date and time
- Next plans
- When
- Where did the conversation take place
- When and where were not included in the case note.
- Giving more information about her rent situation.

## How might you make this a more effective case note?

050

(4/4)

- Also mentioning if interpretation was provided
- Who was present?
- Why is the client having a hard time paying rent this month?
- Putting date/time
- Mention when and where
- what exactly CM is going to do, and when
- Time
- Where did it take place. What are the next steps.
- Mention possible options to look into
- Include how the communication was conducted (I.e. phone call, text, in person)
- Document the date and time
- Add time and date
- Where and when was this discussion?
- When, where did the discussion take place

## Try writing a SMART goal for Samer, considering both his hopes and his barriers.

035

(1/5)

- I would twll him to follow up with ss office. I would also suggest him to apply for FAFSA, because he is eligible for Aid.
- Transportation
- Once financially self sufficient, start with taking a couple of courses in college
- First begin preparing for employment while waiting for SS card (I.e. work on resumes, interview practice, job searching, other documents he will need)
- Assist him with the application of job. Help him to be in English class provided him with the community resources
- Getting school information on the classes he wants to take. Go to English classes.
- Remind him of what's important first
- IGo I will work on XYZ by this date to in order to be able to secure a secure a job to save up for tuition. I would also see what the barrier is and make a smart goal around that smaller goal.
- Enroll in online free courses that don't require a social security card

## Try writing a SMART goal for Samer, considering both his hopes and his barriers.

035

(2/5)

- Ss and ID are first steps, work on his English. Reach out to local employers and apply for jobs
- I encouraged him to continue going to school until he gets his documents
- Start working on their resume
- Ask if he has HS diploma ?
- First goal would be starting ESL classes, while working of finding out the progress on SS card.
- Help expedite request on his behalf for SS -> Make a research for possible grants for SIV holders -> connect Samer to employment programs to support his income
- Let Samer know that it's normal for stuff to take time. Break it down into chunks: what do you hope to achieve in a month, 5 months, 1 year. Or break by steps, get proper documents first. Take English next. Then look for a job. Then apply for college after a while.
- SSN, EAD
- Verify he has not received his SSN

## Try writing a SMART goal for Samer, considering both his hopes and his barriers.

035

(3/5)

- Contact SSOoffice Help with employment
- Within the next 3 months: follow up with the Social Security Administration, gather all required immigration and identification documents, and attend any necessary appointments to obtain my Social Security Number
- Transpiration literacy
- Make a plan first
- 1)look for majors he'd be interested in as we look into ss delays
- Priory work permit
- Referr the client to programs that help with barriers
- Within the next 60 days, Samer will obtain his Social Security card and apply to at least 5 entry-level jobs with support from his case manager in order to secure stable employment and begin saving for college tuition
- The client will obtain an update on SS card within the next 3 months in hopes to obtain his card
- Spend time researching

## Try writing a SMART goal for Samer, considering both his hopes and his barriers.

035

(4/5)

- potential jobs that he can balance with school. Checking in weekly about social security application progress.
- Prepare to take English proficiency test or enroll in English classes until ss is processed
- Creating the plan to make a balance between employment condition and what course work he is planning to undertake.
- Saner will apply to three jobs each month
- English
- Assess his level of English and get him enrolled in a class if needed so he's ready for university classes
- Follow up with Social Security administration about his card
- Secure long term employment in the next 3 months, and apply to college in the 3 months after that. Reassure him that this process takes time and get him with a cohort of college applicants.
- Improve his English language
- Start with something readily available

**Try writing a SMART goal for Samer, considering both his hopes and his barriers.**

0 3 5

(5/5)

- Address getting social and id first
- Work toward obtaining SS card and Employment permissions first

## How might documenting your service provision support Samer in meeting his goals?

0 3 5

(1/3)

- Track progress
- Helps ensure continuity of services and track follow up needs
- Alter goal if it isn't well targeted to begin with
- Tracking what might be missing
- Show progress toward each smaller, short term goal. Show work behind the scenes that isn't visible otherwise
- Follow up emails on resources and next steps
- self-sufficiency plan
- Keeps you accountable and on the same page
- Being able to track of progress. also may motivate him to show how much he is accomplishing
- Can be used to show progress if he gets discouraged
- Shows him what he has accomplished and how even though it seems small he is moving forward
- Records each small step that will hopefully result in achieving his long term goal.
- In case of staff change

## How might documenting your service provision support Samer in meeting his goals?

035

(2/3)

- to keep the person taking over to stay updated and know his status.
- For accountability
- Keeping on track
- Keep on track
- Document referral
- Tracks progress and improves support.
- Tracking information
- It will allow tracking of the SS card progress, help break down steps for the degree and help him work towards employment. Also help with motivation
- Having written goal help to keep tracking the progress
- Track the progress
- Continue monitoring the case and advances
- Set goals
- Tracking the progress
- Accountability
- Know his process and next step to follow up on
- It shows what Samer and the CM has done to achieve his goals
- Remind him of his progreee
- Help him see a record of what he has been working

## How might documenting your service provision support Samer in meeting his goals?

0 3 5

(3/3)

- on in the meantime EVEN when SS may not be progressin.
- Assist in keeping track of a time line
- Track progress
- It will help remind him what he needs to do and what we can do to support him
- It would show him the progress he's made even though he can see it himself, and sharing and celebrating that with him.
- Document month by month and task by task
- Tracking the progress
- Provide record of his progress as he accomplishes his goals
- Measuring achievements

## What are some words or expressions used in this case note that you might want to avoid? (1/3)

0 4 1

- Only keep the met for a scheduled appointment to discuss employment
- Don't write it unless the client explicitly expressed those things
- Doesn't not wants the entrance level job
- Difficult
- Anything you hope won't be shared with the customers or maying another entity (GRAMA).
- Lazy
- Seems too harsh
- It is good to use client quotes to avoid personal opinions
- Not enough facts. Only feelings. We need facts over feelings
- Client doesn't like any job options
- New case manager Hard to work with
- Avoid saying that the client is hard to work with, also remove that the client needs a new case manager
- Not enough specifics of what happened
- First person
- Hard to work with
- Lazy

## What are some words or expressions used in this case note that you might want to avoid? (2/3)

0 4 1

- "Refuses" and "hard to work with" and "doesn't like"
- Opinion and clearly displaying your own frustrations with the narrative.
- Doesn't like stuff and needs a new case manager
- Doesn't like...
- client is hard to work with
- Needs a new CM
- Include what jobs the client is requesting
- Don't use "like"
- Not to judge
- Need new case manager
- needs new case manager
- Doesn't like the jobs
- Hard to work with
- hard to work with
- Client is hard to work
- Do not assume you know how she feels
- Judging the client
- Take out frustrations of working with them
- Take out the client didn't like and hard to work with
- Saying client is hard to work with

## What are some words or expressions used in this case note that you might want to avoid? (3/3)

- Needs a new CM
- The commentary - client is hard to work with
- doesn't like to work
- Needing new cm
- "Maybe needs a new cm"
- Hard to work with
- take out the last two sentences
- Hard to work with
- Doesn't like, hard to work with
- Hard to work with
- Some of the wordings
- Hard to work with

## How might you center Esperanza and Diego's strengths in your case management approach? (1/3)

036

- Focus on their skills and qualifications
  - Break the ice
  - Help them build community connections so they feel less alone
  - Remind them what your role is (to help them succeed) validate their experience
  - Your experience sets you up for success
  - Build rapport
  - Focus on their strengths
  - I would make them feel that I right with them and assurance
- that they have skills need it here and is about to start.
- validate their concerns
  - Build a trust so they will open up
  - Explain transferable skills and how you can help them showcase that
  - Connect them with cultural orientation that specifically helps them see their skill sets help them acclimate
  - Let them know how they are qualified
  - Talk about American cultural

## How might you center Esperanza and Diego's strengths in your case management approach? (2/3)

036

- Highlight that they have transferable skills and are bilingual. They are also very self aware and willing to grow which is important
- English proficiency?
- Focus on their strengths and past work experience as a tailor and mechanic
- Committed and hard working
- Highlight their skills and experience
- Support system - built in
- Having support from each other and case manager
- Skills experience they have
- They have job experience
- Support the professional experience and level of English
- Have skills
- Their skills
- Experienced like there skills
- Bilingual and educated
- Have already successfully navigated many challenges
- Encourage them by saying their strengths are already an advantage to becoming acclimated in this country.

## How might you center Esperanza and Diego's strengths in your case management approach? (3/3)

036

- Letting them know that the skills they have are things that will help them get a job fast.
- Focus on your jobs, all else will fall in place
- Reassure them that you are there to support them and they have valuable experience
- Eagerness
- Have job experience
- her ambitions
- Their skills
- Hardworking
- Being multilingual and having educational backgrounds
- Remind them of their resilience
- Diego has lots of skills as a mechanic
- ask them what they think their strengths are. document them
- Professional experience
- Ask them to identify it in each other perhaps if they have a hard time talking about themselves.
- Experience
- Hardworking and experienced

## How might you highlight Esperanza and Diego's strengths in your case documentation?

0 3 1

(1/3)

- Set up Short and long term goals
- Target companies they could work for
- Discuss transferable skills from hobbies, volunteer work and previous work experience
- Motivate them to do recertification
- Add their job experience in notes
- Part of the intake (previous experience) and future goals
- Diplomas , resume
- Building resume
- The client seems unsecure about their ability, copy of their profession.
- Confirm that you have met with client and have discussed their experience in detail. Collect any certifications they may have
- Certificacitions and other documentation of the experience
- Mention all the strengths and carve out some time for next steps to talk through ut
- Mention the existing skills and their employment history
- Documenting their skills and abilities
- Record their qualifications

## How might you highlight Esperanza and Diego's strengths in your case documentation?

0 3 1

(2/3)

- and work history
- Degrees/ credentials equivalency
- Mention positive communication, teamwork, and problem-solving skills
- Write 2-4 strengths show the achievement
- Detail work goals and supporting experience directly from client conversations
- Following up
- Add note of their professional experience
- Help them with resumes if they don't have them and case note
- Clients have significant skills and experience
- Use the facts
- Asking questions
- Talk about it and use it in setting goals
- Asking questions
- When talking about the goal that they will accomplish talk about what strength will help them get there.
- Use the facts
- Highlight their willingness to learn and adapt to a new environment

## How might you highlight Esperanza and Diego's strengths in your case documentation?

0 3 1

(3/3)

- Referencing them if they are part of conversations or referrals to other programs
- In our service plans we have an area of strengths and an areas for growth section
- Talk about their experience and education and how you are using that to provide services
- With the copies of the certificates
- Asking open questions

## Why are case notes and other types of documentation important?

1 1 5

(1/8)

- Reference
- Clients can use you to refer back if they forget stuff
- Protection for case manager
- Communication across team and agency
- See the program's impact on client
- To ensure all needed services provided
- Anyone who needs to view the case can access the Case Notes and obtain information about it.
- Can refer back to if you forget
- Accurate communication among team
- Shows next steps
- Shows whats working and what resources are not helpful so we don't provide 'dead end' resources
- Protection for the minor and self
- Proof of services
- Follow up
- Billing and payment
- Tracking , history for next caseworkers
- Track the client's progress and

## Why are case notes and other types of documentation important?

(2/8)

1 1 5

- accomplish with founders' requirements
- Record
- Allows for supervision and accountability
- Tracking services
- Keeps you covered if something goes wrong
- Ensures the continuity of the services
- Be able to understand the situation better and with as a team to help the client
- Tracking progress
- To make success story
- Professional reflection
- Ensure the minor/family get the services they require. Compliance.
- Grievance
- Accountability and engagement
- Supporting work for compliance and billing
- Keep information
- Keep on top
- Ensure the follow-up of the case
- We are Mandated reporters
- Record keeping
- data

## Why are case notes and other types of documentation important?

(3/8)

1 1 5

- Proof for grantor
- For referral into past discussions
- Tracking progress
- accountability, for both
- Tracking progress
- Keep record
- Keep the record
- See the needs
- Proof of what services we provided
- Keeps records
- Follow up
- Accurate communication among the team.
- Tracking
- Tracking client progress
- Tracking
- To support the outcomes
- Monitor process
- Back up
- Tracking
- Compliance process
- Shows services provided
- Tells a story
- Track the progress
- Record keeping
- learning curve for new case managers

## Why are case notes and other types of documentation important?

(4/8)

1 1 5

- Report situation
- assists with continuity of care
- Quality assurance
- Monitoring - follow up and keep record
- Record management
- They document your case management activities with the client.
- It tells the clients story, progress and the impact we are making.
- ensure that clients needs are documented to be able to provide proper assistance
- To keep record
- Keeps a record
- It allows you to go back to review in case there is any questions or concerns.
- Tracking services
- Keep records
- Record to keep and case management
- First monitoring and reviews
- Monitoring, compliance, track record of services/progress
- Ensure proper follow-through
- Congruency for the case progress.

## Why are case notes and other types of documentation important?

(5/8)

1 1 5

- Goals & keeping up with follow ups & next steps
- If you don't document it, it didn't happen
- ensure continuity of care, provide legal protection against liability
- They are not just our legal support but also help us followings
- Track history
- Track
- Kee track of progress
- Record
- To keep track
- Data tracking
- Both required and is great for team communication
- Update information
- Have a record
- It serves as a proof that a service was provided
- Accurate information on service provided, all members of team up to date on what has provided, what has worked, what hasn't
- Proof of services provides
- Monitoring
- Check eligibility

## Why are case notes and other types of documentation important?

(6/8)

1 1 5

- To follow up
- Can't remember 100 clients details
- It is a perfect way to keep track of what you have done and communicated with the client.
- Reflects your work.
- If it's not notated, it did not happen
- Compliance
- Stay in the loop
- If it isn't documented it didn't happen!
- Keep recording
- Documenting
- Keep record of all the service provided
- If it's not documented, it didn't happen
- Incase the client in the future says they didn't receive the service
- Monitoring
- Track the progress
- Cover your tracks and ensure proper communication
- If not documented it never happened
- Continuity of care

## Why are case notes and other types of documentation important?

(7/8)

1 1 5

- Tells the story of what's going on with client
- Tracking
- Keep a record of the great work you have done
- Case continuity
- Track Client Process
- Because it help us keep a record of our work.
- Information
- Keep track of progress
- Accurate representation of case happenings
- To ensure services are being provided
- Protects the team
- Record management
- Track history
- To keep track on progress
- Proof of what services we provided
- Case story, requirements
- Continuity of care
- To understand better the situation
- So other staff have insight into what support is being provided
- Documenting
- funder requirements

## Why are case notes and other types of documentation important? (8/8)

1 1 5

- Monitoring
- It keeps the team informed
- Thorough records
- It protects you
- Context about a case
- Track progress