

Case Note Writing Rubric

Frequency		
Item	Purpose	Example
Daily	Quick interactions like phone calls	1-18-18 Customer attended ABC workshop. 1-19-18 Customer attended DEF workshop and spent time in the resource center. 1-20-18 Customer spent time practicing in Typing Tutor.
Weekly	Review of interactions and activities for the week. Daily items may be summarized in this note.	1-22-18 Customer spent a total of 22 hours in workshops and resource center in the previous week.
Monthly	Progress from the month either positive or negative.	2-1-18 Customer completed all monthly workshops and participated at the resource center for a total of 80 hours.
Quarterly	Highlights of a case activities for the previous quarter.	4-1-18 Customer has completed all assigned training requirements, been given 18 job interview opportunities, received 4 call-back interviews and is awaiting response from 2 potential temporary positions.
Initial	Highlight the conversation of an initial interview, orientation or assessment. This may be a lengthier case note.	Synopsis of intake interview: 1. James... 2. He will... 3. He needs...
Completion	Upon completion of activities and case is being closed out, recap the overall case compared to the initial case note.	James completed all training and items from his initial assessment, scored high in all post-area tests. He has retained a high-demand job for 8 months and has had 2 promotions. We will maintain contact with James monthly through his first year of employment.
Content		
Item	Purpose	Example
Clear	Any reader should be able to understand the content included in a case note. Who is speaking about whom. What is being said should not include acronyms unless all readers will understand. If where something	1-18-18 3:15 PM This writer spoke with Mary Smith regarding her Paid Work Experience (PWE) activities at Senior Care Homes. Mary

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	happened is relevant, it should be included. Include the why, if an activity is not normally noted. Case notes should be written in full sentences.	indicated that she is fitting in comfortably and refreshing all skills learned in training. <i>Submitted by Jane Smith, Case worker.</i>
Concise	Brevity is advised, but relevant information should be included.	Shilondra completed Adult Basic Education training today with a 97%. NOT: She completed ABE today.
Relevant	Items recorded should be in direct relationship to the case note being entered. If a comment does not impact the activity being recorded in the case note, it should not be included.	A family member called today to report that Mary was involved in a car accident and will be in the hospital for an extended period. (Do not include what Mary was doing to be in the car accident unless it directly impacts the progress of Mary's future activity.)
Useful	Facts related to the activity and interactions. Avoid including opinions, derogatory language or emotive language. Subjective opinions are qualified with relevant background information, theory or research.	James confronted another case worker today with abusive language and physical threats. Police were called to the agency.
Time	If not automatically added, include date and time of case note for readers to follow a progression of activity.	January 19, 2018 4:48 PM This writer
Identity	If not automatically added, include your name and position for clarification to other readers.	...and he will follow-up on January 31, 2018. Submitted by Jane Smith, Case worker.
Timely	Case notes should be entered as close to the conversation, activity, or interaction as possible so that accuracy is not compromised.	Today this writer spoke with James about starting the next class in welding. He will....
Readers		
Item	Purpose	Example
Customer	Writing for customer follow-up and progress requires that the customer understand the activities required including due dates and specifics tasks.	During our monthly meeting today, James agreed to the following for next month: <ol style="list-style-type: none"> 1. Attend... 2. Participate...
Co-Workers	Regular, thorough case notes allow co-workers to pick up a case and know what happened or needs to happen.	
Administration		
Partner Organizations		
Funders		

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Documentation		
Item	Purpose	Example
Assessment	To verify initially required documents per program have been signed or reviewed by the appropriate parties.	Signed copies of applications
Time Tracking	To verify weekly or monthly attendance, class room participation.	Class attendance records or time-sheets.
Progress	To verify customer is or isn't making progress and if other actions may be required.	Progress reports. Compilation of monthly case notes.
Resources		
Intro to Case Notes for New Social Workers	https://www.oercommons.org/authoring/8157-intro-to-case-notes-for-new-social-workers/view	
Australian Association for Case Workers	https://www.aasw.asn.au/document/item/2356	
Experience Works	http://www.experienceworks.org/site/DocServer/Case_Management_Writing_Effective_Case_Notes.pdf?docID=23124	
Cook County Workforce Board	http://www.workforceboard.org/Portals/0/ThePartnership/ProviderOrientation/Guidelines_for_writing_good_case_notes.pdf	