

## Progress Note Guidelines

### Making Effective Case Progress Notes in eJAS

Well documented, concise progress notes tell the story of BFET participation from initial enrollment to final outcome. Effective progress notes allow BFET partners to easily track participant's goals, barriers and activities leading toward employment. Client participation in BFET must be monitored and documented in eJAS at least once a month. There are three types of progress notes: (1) Initial Progress Note, (2) Ongoing Progress Note, and (3) Closing Progress Note

- 1. Initial Progress Note:** In the initial month of participation, the progress note would address the following:
  - Employment goal and BFET activities that will help the client obtain this goal  
For colleges, what is the intended degree or certificate and how long will it take to complete the program? For CBO's, how many job search contacts are expected, what type of job training is planned, etc.? Are there barriers that might slow down progress? This initial note is important in telling the story of why the client is participating in BFET.
  
- 2. Ongoing Progress Note:** Ongoing progress notes detail the participant's monthly activities and address the following elements, if applicable:
  - Client's progress in the BFET activity  
Is the participant on track with the education plan, meeting the required number of job search contacts, completing resume/practice interviews, or attending job training programs, etc.?
  - How progress was assessed  
If noting that the participant is making progress, how does the contractor know? Was there in person contact, a phone call, email from client, contact with instructors or verification of continued attendance and grades?
  - Any changes in employment/education plan.  
How will this affect the anticipated completion date?
  - Reason for delay in progress  
If progress is slower than expected or if a component must be extended past the time limit (for example, more than 270 days for VE), the progress note should explain why progress is slower than anticipated and update the new expected completion date.
  - If unable to make contact, document loss of contact and unable to assess progress  
Explain what attempts were made, if reminders were sent to client, and what will be the next step if the client does not respond.
  
- 3. Closing Progress Note:** When BFET participation has ended, for whatever reason, a final closing note would be entered:
  - Documenting the outcome  
Explain why the client left BFET. Was a degree or certificate earned? Did the client obtain employment?

Monthly progress notes can be tracked by using the radio button on the contractor caseload screen. This communicates which participants have monthly notes entered and which ones are still lacking a progress note for the month.

*Note: Confidential information – such as medical information, domestic violence, mental health, disability, and chemical dependency treatment – should not be detailed in the progress notes. When documenting confidential information, refer to them as “confidential barrier” or “confidential issue.”*

## Progress Note Guidelines

### Examples of Progress Notes

#### 1. Initial Progress Note

Chelsea is participating in BFET at Our Community College; she has completed her IEP and BFET orientation. She is confident in her career choice as Network Administrator and is pursuing an AAS degree in Computer Science/Network Administration. This program is usually completed in eight quarters so she anticipates finishing the degree in Spring 2017. She was reminded to check in monthly and was given information on campus resources such as tutoring center. She is currently enrolled in 15 credits for Summer Quarter.

Completed BFET intake and assessment. Client has the following barriers: limited English and limited transferrable job skills barriers. IEP will address these barriers as follows: Client will work with case manager 5 hours a week on job search. Client will attend job readiness class and case manager will refer client to resources to address employment and further ESL classes.

#### 2. Ongoing Progress Note

Mark checked in via Canvas for May; he is requesting assistance with tuition, fees, books, and tools required for summer quarter. College BFET staff has been assisting Mark with determining what resources might be available for these expenses.

Alison's instructors report she is making "satisfactory progress" in Medical Administrative Assistant classes.

Alexis stopped by and reported her classes are going well. She should be finished with her training at the end of June. Alexis has already submitted a graduation application and is not requesting any additional resources at this time.

Jason is very active in job search. Submitted applications at Costco, Home Depot, Lowe's and Pacific Building Services. Also interviewed with ABM but has not heard back yet.

Marlene came in to update resume; she also completed a mock job interview and received positive feedback for her efforts.

Jerry came in to report he has two interviews scheduled for next week; he was unable to complete any job applications last week due to illness.

No progress report for May; sent email reminder of requirement to check in with BFET program every month.

#### 3. Closing Note

Jennifer will graduate with Business Technology degree this month and will be exited from BFET at the end of the quarter.

Abe reports he has been hired fulltime at Boeing and will no longer need BFET services. Closed JS component as of 6/15/15, reason EE.

Calvin has not checked in for two successive months; he has not been participating in BFET so closing VE component 5/15/15 due to loss of contact.