

Module 6: Client Notes

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Client Notes

Client notes in eJAS are an important tool to document a BFET participant's activities and progress.

Well documented, concise client notes tell the story of BFET participation from initial enrollment to final outcome.

The client notes tell the “**who, what, why, where, when, and how**” of the BFET participation.

Effective client notes allow BFET partners and DSHS to easily track participant's goals, barriers, and progress in activities leading toward employment.

Updated 08/2023

BFET Provider's Handbook requires:

The participant's progress must be monitored and documented in eJAS **monthly**.

Expected documentation includes the following:

- Progress in component activity.
- Changes in the IEP.
- Changes in activity(s).
- Participant Reimbursements.
- For BK: Supervised Job Search logs including activities completed, receipt of monthly Job Search Log and how, and steps taken to obtain when not received monthly.

Monthly eJAS case notes must maintain a 95 percent accuracy rate.

Client notes will be audited monthly by the BFET Field Operations team. A report with results and feedback will be sent monthly as well.

Client Note Types

The participant's progress must be monitored and documented in eJAS monthly with at least one of the following four types of client notes:

- (1) Initial Client Note
- (2) Ongoing Client Note
- (3) ABAWD Client Note
- (4) Closing Client Note

Details for all client note requirements can be found in the BFET Provider's Handbook – Case Management: eJAS Case Note Documentation section

The BFET Provider Resource website also has a “Guide to Writing Client Notes” with several examples.

[Guide to Writing Client Notes](#)

Client Note Types – Initial Client Note

When: Entered in the initial month of participation.

Include: Employment goal and BFET activities planned to help the participant reach their goal.

Note: If a participant is in an educational program it is important to document both the educational program and the specific employment goal.

Example 1. *Chelsea is participating in BFET at Our Community College; Participant has completed IEP and BFET orientation. They are confident their career choice as Network Administrator and are pursuing an AAS degree in Computer Science/Network Administration. Chelsea anticipates finishing the degree in Spring Quarter 2024. They were reminded to check in monthly and given information on campus resources such as the tutoring center. Chelsea is currently enrolled in 15 credits for Fall Quarter.*

Example 2. *Completed BFET intake and assessment with client. They have 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 in supervised job search. Case manager will refer participant to resources for further ESL classes. Short term goal is any job to pay expenses, long term employment goal is work in the medical field.*

Client Note Types – Ongoing Client Note

When: At least once per month

Include: The participant's monthly activities and address the following applicable elements:

- Participant's progress in the BFET activity(s)
 - If in BK comp, address how job search logs were received from client, information about the review of job logs, and follow up plans.
- Progress towards reaching individual goals.
- Any changes in employment/education plan.
- Reason for delay in progress
- If unable to make contact, document the attempts to contact, loss of contact, and unable to assess progress.

Note- address *all* components and activities

***Example 1.** Mark completed 6 hours per week of BK and all check-ins with CM for the month of July. Job search logs were completed and submitted weekly via email. CM reviewed logs with Mark and discussed follow up strategies, interview prep, and strategies to focus search through online postings.*

***Example 2.** Deanna continues to participate in the accounting program at our College. Updated BG component to 23 hrs/week for Fall quarter.*

***Example 3.** Michael's BK component has been extended to 9/28. Participant submitted job logs in person. Client has been completing BK hours but not at least 3 contacts/week. Email has been sent to request missing BK logs. Also opened SL component for Workshop starting 9/10 to help with time management skills.*

***Example 4.** Kyle did not successfully complete Fall quarter classes. They struggled with math and English classes and did not pass the courses. Kyle will re-take classes Winter quarter and will utilize tutoring services on campus.*

***Example 5.** No progress report received for May; sent email reminder of requirement to check in with BFET program every month.*

Client Note Types – Closing Client Note

When: BFET participation ends.
When all components are closed.

Include: The outcome and explain why the participant is no longer in BFET.

Example 1. *Received notification that Alex has moved to Oregon and will not be participating in the BFET program. Closed BL component with IC - incomplete code effective 10/1.*

Example 2. *Closed BK component with EE as client has permanent employment and is not in need of any further services. Verified employment by phone call to employer and updated employment info screen.*

Example 3. *Closed BG component with CS effective 12/19 Amber passed all courses successfully. They have not registered for Winter quarter. I called and emailed in attempt to reach them and update plans to continue in BFET program.*

Client Note Types – ABAWD Client Note

When: ABAWDs not waived and participating in BFET to meet ABAWD requirements need additional documentation about participation.

Include: The following elements in the Ongoing Progress Note:

- Number of hours participated in the month.
- Job Search hours must be specific unless your program is included in WIOA.
- Any changes or barriers with participation must be clearly documented.

Example 1. *ABAWD Participation: For the month of October Alan has participated 12 hours per week of BB activities for ESL classes, 2 hours per week of Life Skills, and 6 hours per week of Supervised Job Search. Total of 20 hours of participation for week ending 10/4, 20 hours 10/11, 20 hours 10/18 and anticipated 20 hours for week ending 10/25. Logs for Supervised Job Search were submitted weekly in person. Alan will continue to work on identifying jobs that fit their current skills.*

Example 2. *ABAWD Participation: Amber has been attending Strategies for Success classes along with GED classes. Weekly participation is 5 hours SL and 15 hours BB. For the month of June Amber had a total of 60 hours participation, missed 1 full week due to illness. Is back to regular attendance for both classes.*

Client Note Types – Childcare Note

When a BFET participant is requesting help with childcare to participate in BFET activities you can help facilitate the child care eligibility determination and approval by documenting the following information in eJAS notes:

- Activity (school, job search, job training, etc.).
- Hours of participation (ex: 32 hours per week).
- Exact days and times of the activity.
- Travel time needed to get to activity.
- Study time up to 10 hours per week allowed for child care.
- Location of where online classes are completed.

Childcare notes are not a BFET program requirement but can be very helpful for your participants.

Example: *Judy will be participating in the BFET program for Fall quarter 9/23 - 12/12 and is enrolled in the Business Technology program. Class schedule requires 14 hours/week according to the following schedule: ACCT 113 MTWTh 10-10:50am, BTECH 131 MTWThF 1-1:50pm and CIS 125 (a 5cr hybrid class meeting 4 times/qtr and 5 hrs/wk online, to be done in a college computer lab). Additional childcare time of 10 hours/week of study time and 5 hours/week of travel are requested.*

Entering Client Notes


Steps for entering a Client Note in eJAS

1. From the Client Screen click on the Client Notes link



Home Help

| Name | JAS Id | ACES Id | Reg | CSO | Pgm | AU | Telephone |
|-------------------------------|---------|---------|-----|-----|-----|-----------|-----------|
| CHEERIOS, YUM | 2756085 | 2756085 | 3 | 034 | \$ | 004582972 | |

Two Parent : Required Part? : LEP : EA :  Email ID:

HOH : Total: 000 Recip: 000 Inelig: 000 Sngl Parent W/Child(ren) < 6 : No

TANF : BFA: Open RCA: Refugee Months:

[Click here to view Workers associated with this Client.](#)

[E&T Component Information](#) [WFR](#)
[Employment Information](#) [Adhoc Reporting](#)
[Client Notes](#) [Referrals](#) [Letters](#)
[Payments](#)
[Strategies For Success](#)
[Commerce Program Plans](#) [Client Monthly Participation](#)

Entering Client Notes

Click the button “Add New JAS Notes”

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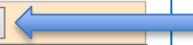


JAS Notes

[Open General Search Options](#) [Note/CE/Assessment Search](#)

Notes

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Select Note Type(s)

Ongoing Observation

Pick types to Create and click Begin Notes

| | | |
|---|---|---|
| <input type="checkbox"/> Admin/ Support Svcs | <input type="checkbox"/> Adult Dependent Care | <input type="checkbox"/> Adult General Health |
| <input type="checkbox"/> Batch Cancellation | <input type="checkbox"/> Bulk Client Attribution | <input checked="" type="checkbox"/> Case Review |
| <input type="checkbox"/> Child Care | <input type="checkbox"/> Child General Health | <input type="checkbox"/> Child Support |
| <input type="checkbox"/> Child Welfare | <input type="checkbox"/> Children w/Special Needs | <input type="checkbox"/> Clothing/Hygiene |
| <input type="checkbox"/> Comprehensive Evaluation General | <input type="checkbox"/> Continuous Activity Planning | <input type="checkbox"/> Customer Contact |
| <input type="checkbox"/> Disability Lifeline | <input type="checkbox"/> Eligibility Determination | <input type="checkbox"/> Employment |
| <input type="checkbox"/> Equal Access Plan | <input type="checkbox"/> Family Planning | <input type="checkbox"/> Family Support |
| <input type="checkbox"/> First Contact Date | <input type="checkbox"/> Home Visit | <input type="checkbox"/> Housing |
| <input type="checkbox"/> Individual Employment Plan Develop | <input type="checkbox"/> Job Search Results | <input type="checkbox"/> Learning Needs |
| <input type="checkbox"/> Legal | <input type="checkbox"/> Literacy/Learning | <input type="checkbox"/> LEP |
| <input type="checkbox"/> Mileage Reimbursement | <input type="checkbox"/> Money Mgmt/Protective Payee | <input type="checkbox"/> NCS Re-engagement |
| <input type="checkbox"/> NCS Reinstatement | <input type="checkbox"/> Other Agency/Tribal | <input type="checkbox"/> Participation |
| <input type="checkbox"/> Post Job Search Review | <input type="checkbox"/> Pregnancy/Parenting | <input type="checkbox"/> Progress |
| <input type="checkbox"/> Refugee Employment Referral | <input type="checkbox"/> Refugee Employment Screening | <input type="checkbox"/> Sanction |
| <input type="checkbox"/> Strategies for Success | <input type="checkbox"/> Time Limit | <input type="checkbox"/> Transportation |
| <input type="checkbox"/> Voucher Authorized | <input type="checkbox"/> Voucher Cancelled | <input type="checkbox"/> Voucher Modified |
| <input type="checkbox"/> Voucher Payment | | |

Select a note type and click “Begin Notes”

The “note type” on this list does not matter for BFET, but you must select one.

Most common selections are Case Review and Admin/Support Svcs

Entering Client Notes

Skip Save and Continue with Note List

Note Category: Ongoing Observation
Note Type: Case Review

Note Text:(3800 Characters) Spell ✓

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Enter the information required for an Initial Client Note,
Ongoing Client Note or Closing Client Note.
Be sure to address activities for **all** components.

Skip Save and Continue with Note List **5**

****Note**** All eJAS Users can read BFET notes.

You must **not** enter any eJAS case notes with confidential/sensitive information about Chemical Dependency, Mental Health, Family Violence, or HIV/AIDS/STD.

If an eJAS client note is entered incorrectly, submit a request to delete the note to JAShelp@DSHS.WA.GOV with a copy of the note and reason for the deletion.

Client Notes – Best Practices

- Update Client Notes with each participant interaction.
- Enter before the end of the 3rd week of the month.
 - The DSHS system for Basic Food updates the 3rd weekend of the month and will begin to close cases if a review was due and not yet completed. This will make impacted clients “disappear” from the active caseload.
 - The participants that “disappear” can always be found on the BFET Contractor Historical Report.

Client Notes – Best Practices

- Create a template for entering your client notes to help ensure you include all of the required information.
- Documenting the employment goal is required in initial notes.
 - For best practice document a short term and long term employment goal.
 - Be very specific in the employment goal.

Client Notes – Best Practices

- Use “Monthly Progress” radio buttons to mark and track client note entry

Basic Food E&T Contractor Caseload

ZXZ-BFET & CONTRACTOR Model: BFET Number of Clients: 0003

Caseload Month Year(mm/yyyy) 112020

| Name Search | | Id Search | | CSO Search | | Component Search | |
|-------------------------------------|----------------------------|--------------------------|--|---------------------------|----------------------------------|---------------------------------|----------------------------------|
| First: <input type="text"/> | Last: <input type="text"/> | Id: <input type="text"/> | | CSO: <input type="text"/> | <input type="button" value="?"/> | Component: <input type="text"/> | <input type="button" value="?"/> |
| <input type="button" value="Find"/> | | | | | | | |

[BFET Contractor Historical Report](#)

| Referral Date | Case Mgr | Id Name | TANF Status | Food Stamp Status | Comp | Comp Hours | Sched Start Sched End | Monthly Progress | Benefit History |
|---------------|---------------------------|---|-------------|-------------------|------|------------|--------------------------|--|-------------------------|
| 10/09/2020 | 034SFO SHEILA FOWLER | 2756085 CHEERIOS, YUM | | Open | JS | 20 | 09/01/2020 10/31/2020 | <input type="radio"/> Yes <input type="radio"/> No | History |
| ----- | 047ADJ FRANCIS ADJEPONG | 2860063 MORNING, MONDAY | | Open | JS | 03 | 11/04/2020 02/02/2021 | <input checked="" type="radio"/> Yes <input type="radio"/> No | History |
| ----- | **** 080CSO UNKNOWN ***** | 2730159 PROD_COPY0859265 | | Open | SL | 05 | 10/29/2020 01/26/2021 | <input type="radio"/> Yes <input type="radio"/> No | History |

When you click the “yes” radio button a note entry screen will open up.

Note Creation

Jas Id:2730159 PROD, COPY0859265

Note Category: Ongoing Observation
Note Type: Progress

Note Text (58 lines)

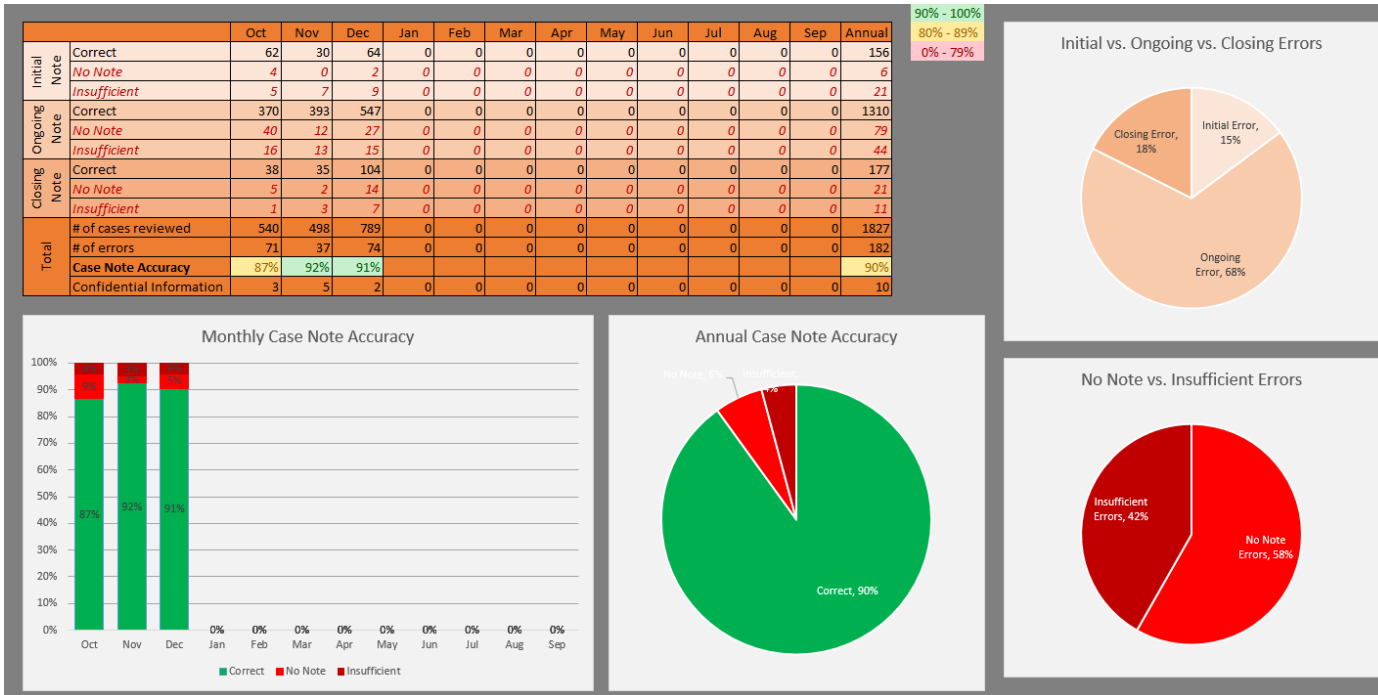
This tool provides a quick way to scan your Caseload screen to see that each participant has a note entered for the month to meet requirements.

After entering your note and clicking “Save Note” the radio button will stay marked for the rest of the month.

Client Note Audits

- Each month the BFET Field Operations staff will audit 15% of your monthly caseload for client note accuracy.
 - If your agency has 3 consecutive months of +95% accuracy we will reduce the audit to 10% of the caseload.
- The audit is reviewing that the monthly client notes meet all requirements including the note type and content.
- Once the audits are completed we will create and send a report with results and feedback.

Client Note Audit Report



The case audit report is an excel workbook that will be emailed to your agency monthly.

The report includes a Case Note page which shows monthly and annual totals for each note type and error type. It also shows the monthly and annual accuracy rate.

A second excel workbook called Case Audit Log shows the name and ID of each case audited, audit finding and comments. Some providers will receive Case Audit Log in the Case Audit Report.

| Name | JAS ID | Outcome | Notes |
|-------------------|---------|---------|--|
| Morning, Monday | 2860063 | Correct | |
| Prod, Copy0934085 | 8110178 | Error | Closed BK comp with LC code which is incorrect. LC – Loss of Contact means a loss of contact with the participant for at least 60 days. Correct code is IC. IC – Incomplete means the participant did not complete the activity by the scheduled end date. *BFA closed 12/31/2022* |

Please contact the BFET Field Operations team for any questions or concerns about the client note audits or results.

Questions??

For any eJAS related questions or for assistance please don't hesitate to contact your assigned BFET Field Operations team member or email BFETHelp@dshs.wa.gov

