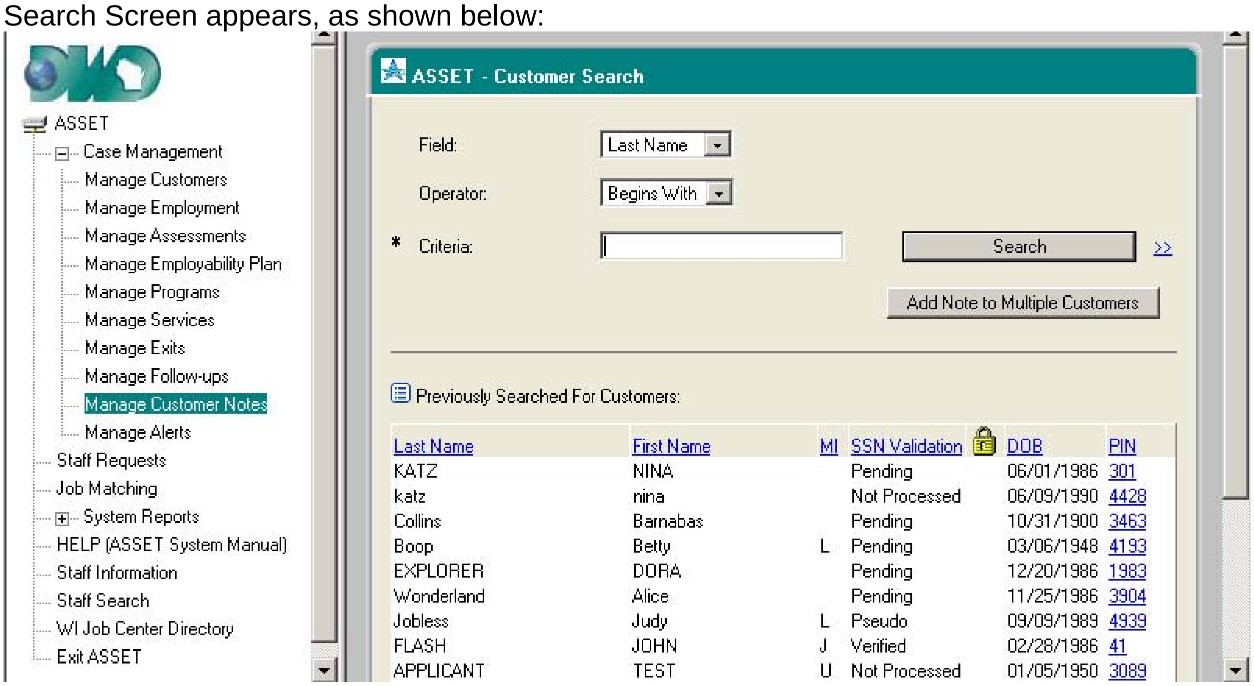
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

The Customer Notes function in ASSET provides workers and others with an opportunity to make a narrative entry about the customer that is not elsewhere documented. The Customer Note can be entered by anyone with ASSET access and appropriate security to update records.

Manage Customer Notes is accessed from the ASSET Menu Tree. Click once, and the familiar Search Screen appears, as shown below:



A worker can “Add Note to Multiple Customers” when the record is currently open or exited in ASSET. To add multiple notes click on the Add Note to Multiple Customer button. The screen then looks like this:

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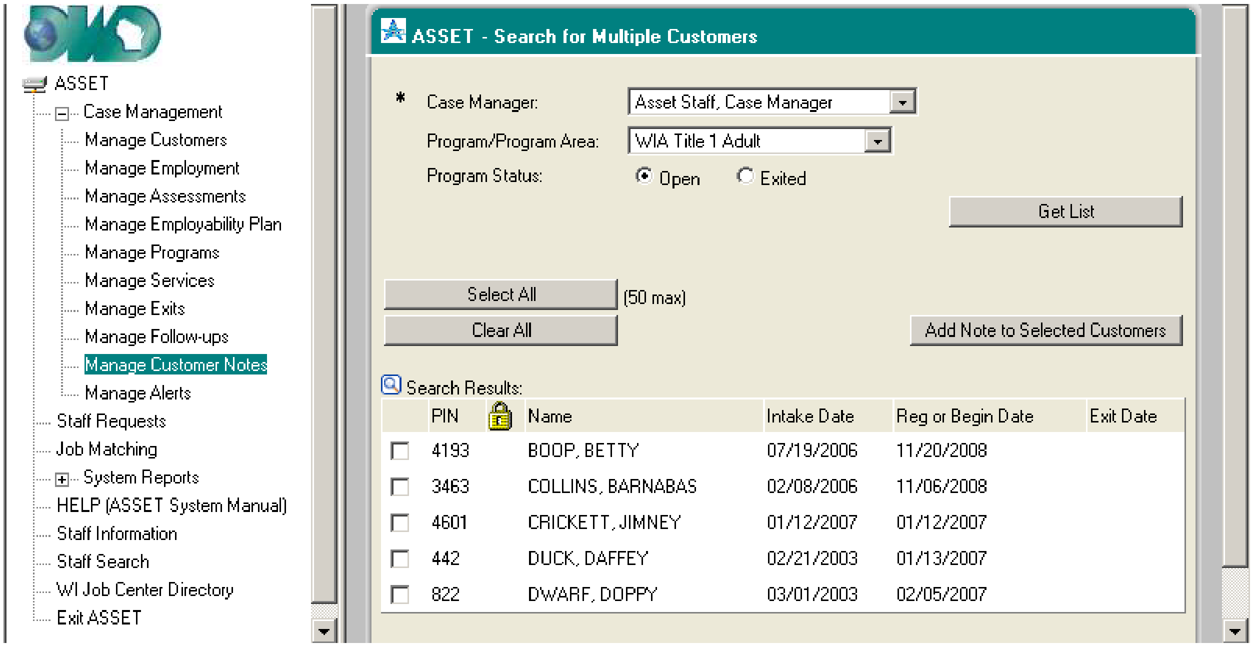
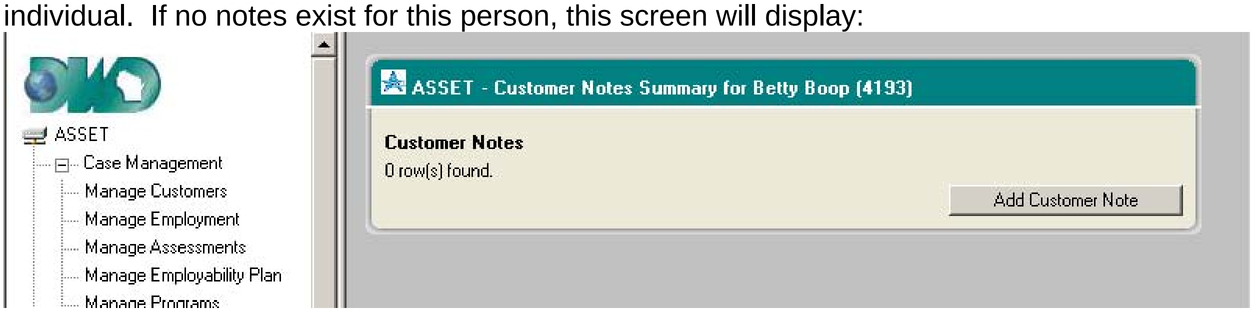


Once the desired list is returned, place a check mark in the box (located on the left of the page), under the Search Results column to post the note for the desired customers then click on the Add Note to Selected Customers button. This returns the user to the Customer Note details screen for completion of the Note. Once submitted, that note is recorded for each individual that was selected.

If the note is for a customer that appears in the Previously Searched For Customers, click on the PIN of that customer (underlined at right of the Customer Search screen). If the person is not in the list, enter search or advanced search criteria and conduct a search to find the correct individual. If no notes exist for this person, this screen will display:



Click on the Add Customer Note and this screen will display:

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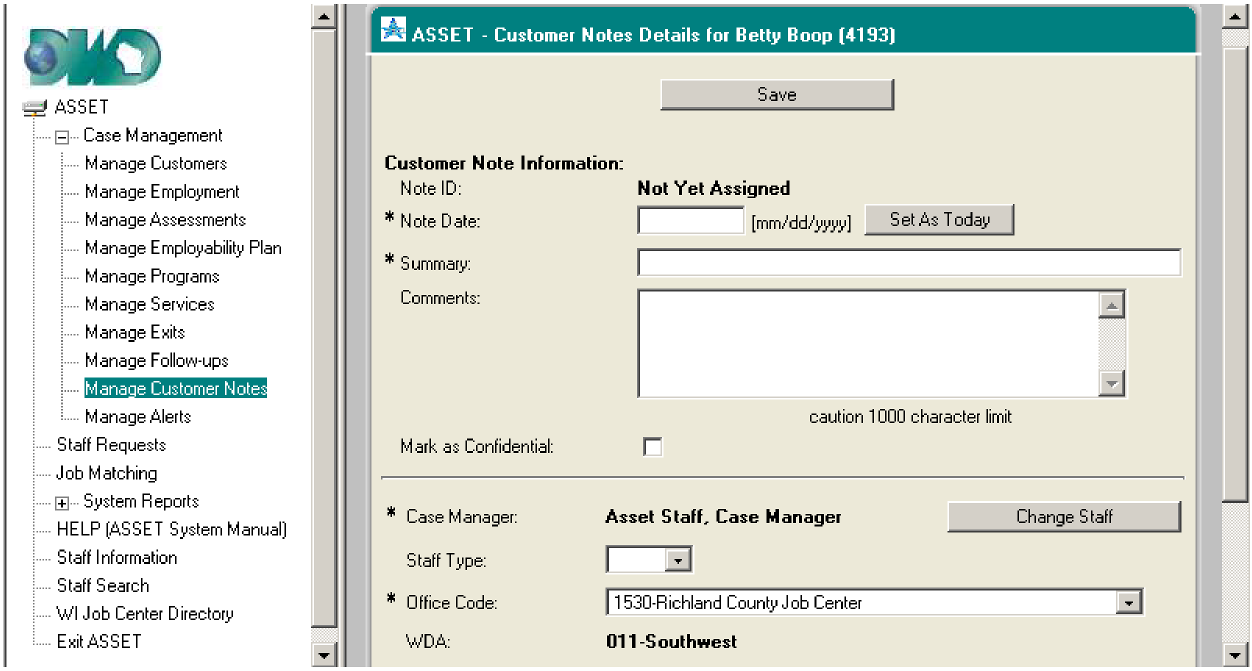

The Note information that can be added includes:

FIELD	REQUIRED	DESCRIPTION
• **Note Date**	Yes	Date that the note is about, usually the date the information is reported or the contact was made.
• **Summary**	Yes	A short statement that gives a summary or key to what the longer narrative is about. For some notes, this may be the only entry. An example might be "No show, no call for 4/1/06 appt".
• **Comment**	No	The full narrative comments that the worker has determined to be a part of the permanent case record.
• **Case Manager**	Yes	The name of the Case Manager responsible for the note.

Once a Customer Note has been entered and saved, the Note is given a Note ID (a system-assigned number the ASSET database uses to track Case Notes) and the note is stored permanently as it was submitted.

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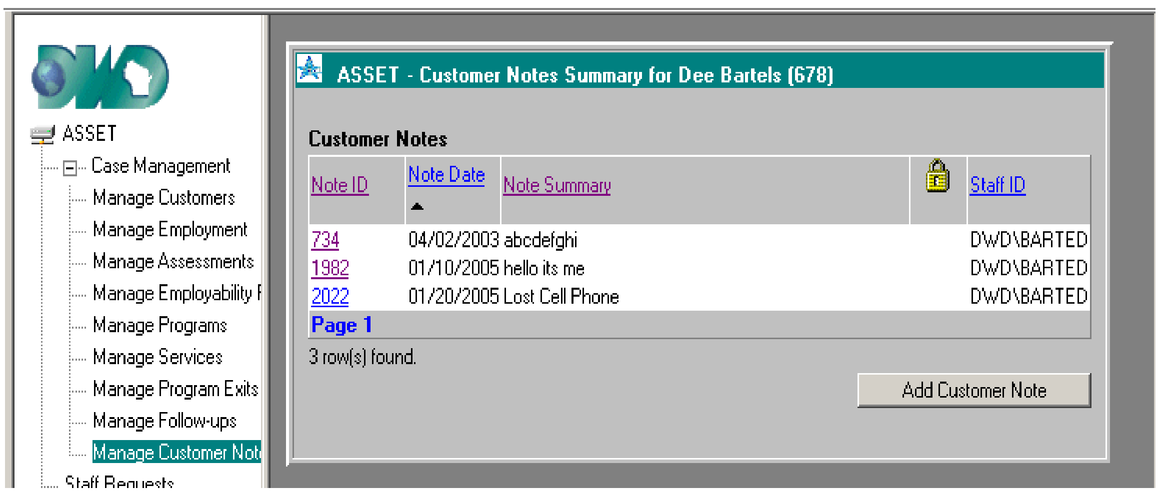
**** IMPORTANT ****

Once a Customer Note has been saved, it cannot be edited or deleted by anyone, except ASSET Administrators at DET.

The screen below displays once the Save button is clicked. It is also the screen that appears when first coming into the Manage Customer Notes function and selecting an existing or searched for customer.



A Case Manager can view a list of case notes in a sort order of their own choosing. A sort can be completed by selecting either Note ID, Note Date, or Staff ID. If Note Date is chosen, click on the Note Date (underlined) in the header column and the notes will re-arrange from oldest to newest (notice a down or up triangle [∇] appears that lets the user know which direction the sort is being done under for each column header). Click the Note Date again and it will re-arrange the notes back from newest to oldest. The system-assigned Note ID is used as the link to retrieve this note for review. If the note has been marked as “Confidential”, an X will display on the line below the lock icon, and only the Case Manager, Supervisor or ASSET Administrators can have the note retrieved. If a non-authorized user attempts to access a confidential note, the following screen displays:

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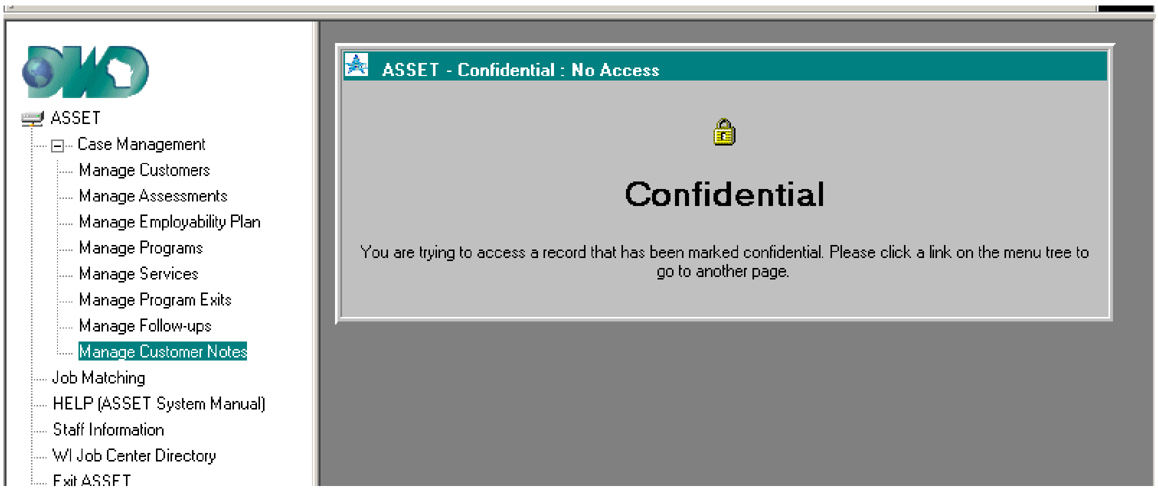

Case Notes – General Policy

Case Notes must be a factual record of case history and action. These comments develop a summary record of an individual's chronological program participation history. The following are key recommendations for writing appropriate comments:

- **Enter data immediately** so events are entered sequentially. The case notes should provide anyone with program knowledge a general concept of the individual's chronological participation in the program.

- **Make them understandable.** Phrase and punctuate all comments so that they are easily understood by others. Use common abbreviations and acronyms so that others can read them.

- **Write comments as if a public record.** Note actual worker observations and actual exchanges that took place between the individual and the case manager. A good rule to follow is to write only comments that the worker would be willing to defend in court. Case notes are viewable by any individual with a logon ID, unless marked as confidential. (Even confidential notes are viewable by a few ASSET users.) Also, if an individual requests to see a copy of his/her record – that includes the case notes.

- **Maintain notes of all participant contacts** (in person, via telephone, e-mail or mail) to assist in refreshing the case managers memory and to help plan future employment and/or training direction. Also note if someone calls on behalf of the individual.

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- **Document case manager actions and employment/training plans** in the event the case manager is questioned at some later point regarding his/her interactions with the individual.

- **Do NOT enter worker biases or judgements.** Notes should be written to describe an individual's behavior rather than case manager's interpretation of the behavior. For example, don't make the statement, "Individual came in drunk". Instead describe the participant's behavior, such as "Individual had slurred speech, red eyes, had a difficult time maintaining balance, had an odor which resemble alcohol and repeatedly called me sweetheart".

- **Avoid making subjective statements**. Workers must avoid entering personal comments in the case record. As case managers, workers are to remain objective and ensure that their personal values and opinions do not interfere with the process of providing effective case management. Comments that include subjective statements can quickly become discredited in an appeal process.

- **Review what is written before saving.** Workers should review comments for accuracy, comprehension, readability, grammar, and completeness. **Once saved, only DET ASSET Administrators may update or delete the Customer Note.**

The following are examples of subjective statements and an objective way to phrase the situation.

~~Objective Vs. Subjective Statements~~	
Objective (Fact-based)	**Subjective (Opinion)**
The person had an odor that smelled like alcohol.	He was drunk.
Individual stated s/he wants to stay in the home.	S/he doesn't want to work.
The individual has significant barriers to employment including no work history, no HS diploma or GED . . .	S/he will never get a job.
Individual stated s/he did not want to participate in the program.	S/he isn't going to cooperate.
S/he has not paid child support for the past two years.	S/he's a deadbeat Dad/Mom.

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~~Objective Vs. Subjective Statements~~	
Objective (Fact-based)	**Subjective (Opinion)**
The individual was asked to come in dressed for an interview. S/he came in soiled jeans and a tank top.	S/he doesn't know how to dress.
The individual stated she was at the work experience work site. The supervisor confirmed s/he was not at the site.	S/he's a liar.
The individual states s/he is a people person who enjoys doing things for others.	S/he's a wonderful person.
S/he did not answer any of the questions and stated "It is none of your 'swear word' business." S/he then walked out of the office.	S/he is very hostile.
The individual is two months behind in rent and does not have any source of income.	S/he needs to get a job.
The individual has developed a pattern of no shows for activity and has not called to give reasons.	S/he doesn't care.
The individual didn't show for work five days in a row without contacting the employer.	S/he wanted to get fired.
The individual completed 10 more employer contacts than required and stated s/he really wants a job.	S/he really wants a job.
S/he stated s/he was excited about working in the program and that s/he wanted to find employment.	S/he is enthusiastic.

~~Basic DO's and DON'Ts~~	
Case notes should be:	**Case notes should not be:**

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~~Basic DO's and DON'Ts~~	
Case notes should be:	**Case notes should not be:**
• Factual	• Fabrications
• Objective	• Subjective
• Impartial	• Biased
• Brief	• Wordy
• Unemotional	• Heartrending
• Impersonal	• Personal/Highly Confidential
• Unprejudiced	• Reflect Workers Prejudices
• Specific	• Vague
• Dispassionate	• Dramatic
• Descriptive of Behaviors	• Interpretation of Behaviors
• Written as Public Record	• Written as Personalized Document
• Written with Commonly Understood Abbreviations	• Written with Personalized Abbreviations
• Precise	• Rambling
• Readable	• Written in code
• General Data	• Highly Sensitive Data
• Concise	• Lengthy

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