Case Notes Tips

- Remember, your case notes should be a record of your client's journey through the process; another case manager should be able to pick up where you leave off
- Your case notes should reflect what you did to positively impact your client and the outcome
- Your client ultimately controls the outcome, not you!
- Your case notes should be used to summarize your conversations with your client, interpret what they are saying, and document the strategies you and your client are employing to achieve a positive outcome
- Identify your client's ***motivators*** in your case notes
- Record information that is directly related to your client's outcome goals
- Include ***facts only***—not your ***opinions***!
- Never repeat or duplicate information documented in a previous case note
- Include your client's voice in your case notes (eliminate the word "told")
- Always ask open-ended questions
- Identify your client's strengths as well as their barriers/challenges
- Ask your client what they can do well—avoid the word "skills" where possible
- Remember—barriers do not define a person!
- Exercise caution and respect confidentiality when documenting information about your client's medical history and past engagement with the legal system