

LA:RISE CalJOBS Case Note Templates

The purpose of this document is to make the case noting process in CalJOBS more efficient and simplistic.

LA:RISE service providers are mandated to write case notes, at a minimum on a monthly basis, to track the client’s LA:RISE journey (transition from subsidized, transitional employment to unsubsidized, permanent employment) and to detail program milestones and outcomes achieved by the LA:RISE participant and the services provided by the contracted service provider.

The table below covers sample case notes for key LA:RISE program service delivery and anticipated outcomes during the 12-month LA:RISE program year including the LA:RISE intake and onboarding: assessments, service referrals and linkage to housing; barrier removal and support services provision; subsidized, transitional employment placement and work experience (WEX) opportunity status; participant goal setting and employment action plans status; job readiness assessment (JRA) provision and pass rate; total WEX hours worked, job readiness and job placement status, retention services provision, and CalJOBS Agency Defined Program record closure status.

Use the sample notes below as follows:

- When making a case note, use the header to determine which type of case note you need to make.
- Once you decide on the type of case note, copy the header and the body and make the necessary edits as appropriate for the participant.
- The words and phrases that are in brackets and bold will need to be changed to reflect your agency’s name/ESE and the participant’s.
- Once modified, you can proceed to enter the case note into CalJOBS

CASE NOTE #1	
Header	Body
<p>ESE Update: LA:RISE intake and onboarding</p>	<p>Client completed LA:RISE intake and onboarding on [date]. All required LA:RISE program documents were completed and signed by ESE and client. Case Manager completed an initial assessment with the participant and reviewed client’s employment, income, education, and housing status information. Client’s last job was in [month year] and client is currently living [housing status].</p> <p>Upon completion of [ESE] orientation and onboarding process, client will be eligible to work as a [job title]. (If Applicable): Client will be required to attend pre-WEX job readiness training and is expected to complete and be ready for WEX placement by [Date]. While completing WEX with the ESE, the Client will be continuously trained in soft and hard skills development, given feedback in the areas of work performance and company procedures/guidelines, work with ESE case</p>

	<p>managers to improve skills, attend trainings, apply for outside jobs, and provided supportive services.</p> <p>Client was screened for WIOA program eligibility and connected with WSC partner case manager for co-enrollment.</p> <p>Client was provided with the following referrals and resources [resources provided] and will be meeting monthly with ESE case manager for ongoing supportive services.</p> <p>Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services</p>
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CASE NOTE #2	
Header	Body
<p>ESE Update: LA:RISE subsidized, transitional employment placement/ work experience (WEX) opportunity</p>	<p>Client started work experience with ESE [or External Worksite] on [date] and will be working [#] hours/week. Client is anticipated to complete WEX on [date].</p> <p>Client was provided with the following referrals and resources [resources provided] Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p> <p><i>Options to add to ESE Update:</i></p> <ul style="list-style-type: none"> • <i>Client has not started transitional employment yet, but is currently...(prepping for transitional employment, in the onboarding process, etc.)</i> • <i>Client dropped the program and did not start transitional employment.</i> • <i>Client was suspended on...</i> • <i>Client received a write-up for ...</i> • <i>For the past four weeks, client worked an average of ... hours per week.</i>

CASE NOTE #3	
Header	Body
<p>ESE Update: Goal setting and employment action plan (IEP)</p>	<p>Client has been co-enrolled with [WorkSource Center partner] under WIOA. ESE case manager and WIOA case manager have begun to provide co-case management</p>

	<p>support and services to the client. An Individual Employment Plan (IEP) has been developed for the participant. The participant has expressed interest in [sector work/career pathway/ training].</p> <p>Client is still enrolled with [ESE] WEX program. To date, Client has completed [#] hours of WEX.</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services</p> <p><u>For LA:RISE Youth Academy Only (if applicable):</u> Client has completed InnerSight Career Assessment experience on [Date]. Funding source: [LA:RISE or Non-LA:RISE] funds were used to provide this supplemental service.</p>
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CASE NOTE #4	
Header	Body
<p>ESE Update: Job readiness assessment (JRA) #1</p>	<p>Client is still enrolled with [ESE] WEX program. To date, Client has completed [#] hours of WEX.</p> <p>The client has completed the first LA:RISE JRA:</p> <p>JOB READINESS ASSESSMENT [#] ASSESSMENT DATE: EVALUATORS: SCORE AND SUMMARY: Copy of JRA submitted to WSC Partner</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services</p>

CASE NOTE #5	
Header	Body
<p>ESE Update: Job readiness assessment (JRA) #2</p>	<p>Client is still enrolled with [ESE] WEX program. To date, Client has completed [#] hours of WEX.</p>

	<p>The client has completed the second LA:RISE JRA: JOB READINESS ASSESSMENT [#] ASSESSMENT DATE: EVALUATORS: SCORE AND SUMMARY: Copy of JRA submitted to WSC Partner</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services</p>
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CASE NOTE #6	
Header	Body
<p>ESE Update: Job readiness assessment (JRA) #3</p>	<p>Client is still enrolled with [ESE] WEX program. To date, Client has completed [#] hours of WEX.</p> <p>The client has completed the third LA:RISE JRA: JOB READINESS ASSESSMENT [#] ASSESSMENT DATE: EVALUATORS: SCORE AND SUMMARY: Copy of JRA submitted to WSC Partner</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>

CASE NOTE #7	
Header	Body
<p>ESE Update: Workshops/Training</p>	<p>Client is still enrolled with [ESE] WEX program. To date, Client has completed [#] hours of WEX.</p> <p>Client attended a workshop/training on [date] that covered the following content: Workshop/training was provided by: [ESE, WSC or other]</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services.</p>

	Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.
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CASE NOTE #8	
Header	Body
ESE Update: Transitional Employment/ Work Experience (WEX) Completion	<p>Client completed the transitional job employment program on {date}. Client worked a total of [#] WEX hours with [ESE].</p> <p>ESE and WSC LA:RISE job developers are working to provide job placement services.</p> <p>Client attended the following LA:RISE targeted hiring event(s): [date and employers, coordinated by ESE and/or WSC or other].</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>

CASE NOTE #9	
Header	Body
ESE Update: Placement Status (Unsubsidized Employment)	<p>Client obtained outside employment on [date] with [placement name]. Client has also been informed about LA:RISE Retention Services program and [is or is not] interested in receiving continued LA:RISE case management support post job placement.</p> <p><u>For LA:RISE Youth Academy Only:</u> Client has enrolled in certificated training with [school/training name]. The training sector is: [sector/name of program]. The Certificate of completion is anticipated to be secured by [date].</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>

CASE NOTE #10	
Header	Body

<p>ESE Update: Program Exit/ Agency Defined Application Record Closure</p>	<p>EXIT DATE: EXIT SUMMARY: Client's file with [ESE] has been closed due to [reason]. NEXT STEPS:</p> <p>All LA:RISE program outcomes have been updated. At the end of the program, the client's housing status is: living [housing status].</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>
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CASE NOTE #11	
Header	Body
<p>ESE Update: Retention Services Provision #1</p>	<p>Confirmed placement of participant in unsubsidized employment with WSC partner and have shared LA:RISE Retention Referral Form.</p> <p>Client is engaged in the LA:RISE job retention program. Client provided proof of employment and has received the first job retention financial incentive.</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>

CASE NOTE #12	
Header	Body
<p>ESE Update: Retention Services Provision #2</p>	<p>Client continues to be employed and received the second LA:RISE job retention financial incentive.</p> <p>Client was provided with the following referrals and resources [resources provided] and supportive services. Funding source: [LA:RISE or Non-LA:RISE] funds were used to pay for these support services.</p>