



## SCSEP Case Management Note Form

(This form cannot be used as an acceptable Self-Attestation Form)

Case Notes consist of the case worker's own documentation of his or her activities. Case notes can be based on information derived in person or by telephone. SCSEP subgrantees can use this form if official documentation or other acceptable source documentation is not available for any of the items listed below. Complete questions 1-4, **check** the box of the item below that this Case Note references and record the detailed note to serve as documentation for Data Validation.

Name of job seeker: \_\_\_\_\_

1) Name of source of the information: \_\_\_\_\_

His/her phone number: \_\_\_\_\_

His/her organization and title or relationship to job seeker: \_\_\_\_\_

2) Name of person making note: \_\_\_\_\_

3) Date the following information was obtained: \_\_\_\_\_

4) Date the information was recorded (if different from #3): \_\_\_\_\_

Detailed Case Note: \_\_\_\_\_

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**Assessed and captured only  
at time of enrollment for Most-in-Need Measure:**

- Homeless
- At risk for homelessness
- Low Employment Prospects--You must (a) identify the barrier(s) in notes above and (b) explain how the barrier(s) reduces the chances the participant will find employment. (No explanation is needed if the barrier is Homelessness, Limited English Proficiency, Low Literacy, or a documented Disability.)
- Failed to Find Employment after being enrolled in Workforce Innovation and Opportunity Act Title I Services/One-Stop Delivery System

**Assessed at time of enrollment and  
revalidated once during each program  
year for MIN:**

- Limited English Proficiency
- Low Literacy

**Other uses:**

- Number in family (must include reason information is accepted without signature)
- Unemployed at time of enrollment
- Approved break in service—must include reason for break, date break begins, and date break is expected to end (if known)
- Quarterly training hours paid (Include who provided the training, where and when, etc.)
- Exit date
- Follow-Ups: Wages for second or fourth quarter after Exit quarter (Is the job seeker employed in Q2 and/or Q4 after exit?)
- Follow-Ups: Earnings for second quarter after Exit quarter (How much did the job seeker make in Q2 after exit?)
- Other \_\_\_\_\_  
(Use only if a case note is acceptable documentation.)