

## **General DET Contract Policy 8 - Program Notes (Youth and Adult)**

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The purpose of the policy is to describe the procedure for entering electronic program notes within the Delaware Job Link system (DJL). Program notes are essential to the effective provision of case management, as they assist with managing and supporting participant progress. Complete and detailed Program notes help plan, implement, evaluate, and document services. Program notes must be entered on an as needed basis to document services, progress, events, etc., but at a minimum:

1. Pre exit, notes are required to be entered monthly to document the minimum standard of contact (General Policy 7) is being met.
2. Post exit, they should document the contact is consistent with the post exit participation plan found in the ISS.

### Procedure

Program notes will be notated on the Program Details screen of the individual participant. The following steps are required to complete a Program note:

1. Conduct a client search.
2. The first screen is the Case Details / Universal Information page. Scroll down and select the appropriate “Program Registration”
3. This will take you to the Program Details page. Select “Program Notes” and then select “Add a Note”
4. Select the “Type” of contact
5. Enter the “Reference Date” – this should be the date the contact occurred.
6. Enter a brief description (subject line)
7. Enter the detailed Program note within the “Notes” box. Program note should describe the when, where, who, what, and why. You are allotted up to 2500 characters. Upon completion of the note - please check the spelling.
8. Select “Save”

Re-Contact date may be left blank, however if there is a date entered, Program staff will receive notification email to contact the client on the date entered. This can be a useful reminder.

When writing programs notes, staff should keep in mind that notes may be viewed by staff with the same program registration (e.g. Blue Collar) and not accessible by client with their job seeker account.

Attachment A is a guide to assist contractors with what to include and not to include in the Program Notes.

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Attachment A

### Program Notes: What to Include and What to Leave Out

You can use your on program notes to refresh your memory about an individual. In addition, others might review your notes for different purposes.

- A coworker might need to consult your program notes to take action when you are not available.
- A supervisor might review your program notes to monitor the individual's progress or your compliance with federal and state policy.
- A monitor might review your program notes in a desk audit to monitor local compliance with state and federal policy and procedure, especially in data validation.

Whether to refresh your memory or to capture the information someone else needs about the case, program notes should always include:

- Date of the note
- Name of the staff member making the note
- Description of the event
- Factual description of the event
- Purpose of the decision or action involved
- Decision made or action taken
- Details of the decision or action
- Reasons for the decision or action
- Plans for future action
- In any questionable situation, a citation of federal, state, or local policy or procedure allowing the decision or action

In your program notes, you are not just representing yourself. Program notes are legal documents that also represent the local area program. So, ensure that your program notes are appropriate.

- Record facts only – behaviors you observed and statements you heard; do not make a diagnosis.
- Record facts accurately and completely.
- Never include judgmental opinions, stereotypical comments, or any offensive statements. Do not make any comments you could not defend in a court of law.
- If you must state an opinion relevant to the individual's participation and progress, be sure to label your statement as an opinion.
- Use clear, simple, concise language, including professional terminology if appropriate.
- Do not make sarcastic comments.
- Avoid metaphors or similes; just say what you mean directly.
- Do not comment on details that are not relevant to the individual's participation in program, services, or activities.