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COSPONSOR CASE NOTE GUIDELINES

If it's not documented, it didn't happen!

Three types of case notes are required in order to document the set-up, arrival, and resettlement of refugee families by cosponsors in the first 90 days and thereafter: *Mandated Case Notes*, *Weekly Summaries*, and *Incidental Case Notes* (the content of these may be included with the Weekly Summaries). All of these should be completed by the main contact person based on information from the primary team members involved in each task. In some cases, this will be the same person.

Mandated Case Notes

IRIS has provided a Case Note Template for Cosponsor Cases that utilizes the federally mandated language (**noted in red type**) for each of the core services that must be noted within the first 90 days. This is available on Google Docs (see "case notes" folder) or downloaded from the Cosponsor Portal on the IRIS website (requires a passcode) beginning May 15, 2017. There are 13 required notes beginning with Pre-Arrival Set Up continuing through the CORE/cultural orientation assessments (to be completed after the CORE training held at IRIS). **Fill in the missing information, add additional information where possible, and date each note.** Include names and necessary details where possible. Cut and paste the entire note in an email and submit it to your case manager Jan Holton (jholton@irisct.org) or Greg Marino (gmarino@irisct.org).

These mandatory case notes run concurrent with the weekly case note summaries until they are complete (most are complete by day 30). Afterward, the weekly case note summaries will suffice unless there are incidents or events that require special notation.

Incidental Case Notes

Incidental Case Notes are required to document any special circumstances or events that affect the client (especially within the first 90 days) including for example: major problems, emergency medical or mental health difficulties, delays or disruptions in cash assistance or SNAP, conditions that threaten employment, and the like. All notes should include the name of the client (family member) affected, names of cosponsor person/s and agencies involved in assisting the client during the event. Provide as many relevant details as possible about the event and outcome (day, time, circumstances, who was present, location of the event, who responded, outcome, expected follow up, etc.). This note may be attached to the Weekly Summary Note for that week but should exist as a separate note.

Weekly Case Note Summaries

Weekly Case Note summaries are intended to provide an overview of the key events and services affecting the clients during each week throughout the 90-day R&P period. These should be written in narrative form and in reverse chronological order (always put the most recent note at the top if you choose to create a continuous weekly log). All notes should be written in the third person voice, objective, clear, and to the point and reflect the facts of the event/s and/or outcomes being described.

Ex. This week included attention to multiple medical matters. Sue Jones (name of person) took the three youngest children, Abdul, Safaa, Mohammad, accompanied by their mother Fatima to the dentist (Dr. Smith, D.D.S.) where the three children had appointments for initial exams and cleanings. All three had extensive cavities that will require multiple follow up visits which are now scheduled. Children handled the exam well and were calm and cooperative. Fatima was nervous but thankful for the good care provided by the dentist....

Do not include unnecessary opinions or other non-essential information. (Ex. The lines were very long and we had to wait 3 hours which made us late for lunch.). Do not list the days of the week and name the events of the days.

Monthly Case Note Summaries

Following the 90-day R&P period, we would request you to send your case manager monthly summaries. While they are not mandatory, they nonetheless would highlight both progress toward self-sufficiency and any particular problems and/or issues for your case manager's information.

JH 5/2017