

# Writing an Effective Case Note in OSOS

## SSAN: Situation, Summary, Assessment, Next Steps

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### Situation – Where are they at?

The first step in writing a case note is recording the reason why the customer is meeting with you. Present the customer's situation. Recount their story, history, present circumstances, reflections, and actions. Include the customer's previous occupation, and occupational goal (if different), consider directly quoting customer statements. Detail any relevant information that is not collected anywhere else in OSOS (e.g., if a customer discloses a disability, you would document any regular workplace/training accommodations)

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### Summary – What did you do?

Detail what happened during the appointment. Provide a clear, concise, objective account (summary) of the appointment. Include specific information and resources that were discussed with the customer. Also include specific Labor Market Information you provided based on the customer's past and desired occupations. Include a brief statement on resume revisions provided during the appointment. Example: revised resume, moved education to bottom, revised professional summary to include qualifications from most recent position.

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### Assessment – What do you think?

The assessment is ongoing and should be included in each case note. During your assessment, identify if your customer has any barriers to employment. If the customer has barriers, include the employment barriers in the case note. *Example:* Barriers include transportation and lack of HS Diploma. *Example:* Needs referral to ACCESS VR; customer lost license due to DWI. If you identify potential issues with the customer's continued eligibility for Unemployment Insurance, you must advise the customer of the potential barrier and consequences. Document the advisory in the case notes and include whether the customer was able to remove the barrier or not.

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### Next Steps – What will they do?

Outline what action(s) you and your customer will take to address challenges after the appointment. Specifically list what assignments or tasks the customer will complete between appointments. Next steps should include job referrals the customer agreed on applying to and should include any workshops or other appointments the customer was referred to.