

SkillUP Case Note Guidance

This document is being provided as an addition to the Case Notes section in the FSD SkillUP Handbook and the DWD Statewide and Regional Service Notes Policies. All are available to download at <https://www.mccatoday.org/skillup-program-documents>.

An initial case note is mandatory and should include information regarding: summary of eligibility, plan of activities to be offered, and how the plan will be implemented.

A case note should be made for each of the six activities you enter into the SNAP application. Those activities are:

- a. 101 orientation
- b. 107 provision of labor market data
- c. 213 comprehensive assessment
- d. 205 develop IEP
- e. S20 – SkillUP FNS
- f. 361 SkillUP training

Samples of case notes for 101, 107, 213, and 205 are below:

Case Note ID:	6985593		
Create Date:	10/22/2018		
Case Note Type:	Enrollment	Last Edit Date/Time:	10/22/2018 3:54:37 PM
Contact Date:	10/22/2018		
Contact Type:	Face-to-Face		
Program:	SNAP Employment and Training	Application ID:	3241101
Subject:	Program Orientation	Partner Program:	SNAP Employment and Training Services
Staff Member:	STACEY WIDEMAN	Office Location:	FSD Partner Southeast
LWIA:	Southeast Region		
Notes:	Shared SkillUP and Pharmacy Tech program info and expectations with client. Client is ready to participate and understands requirements.		

Case Note ID:	6985588		
Create Date:	10/22/2018		
Case Note Type:	Enrollment	Last Edit Date/Time:	10/22/2018 3:52:53 PM
Contact Date:	10/22/2018		
Contact Type:	Face-to-Face		
Program:	SNAP Employment and Training	Application ID:	3241101
Subject:	Comprehensive Assessment	Partner Program:	SNAP Employment and Training Services
Staff Member:	STACEY WIDEMAN	Office Location:	FSD Partner Southeast
LWIA:	Southeast Region		
Notes:	Client would like to participate in Pharmacy Technician program. Assisted with program registration form. Instructed of program requirements. Eligible for SkillUP funding.		

Case Note ID: 6985602
 Create Date: 10/22/2018
 Case Note Type: Enrollment Last Edit Date/Time: 10/22/2018 3:57:07 PM
 Contact Date: 10/22/2018
 Contact Type:
 Program: SNAP Employment and Training Application ID: 3241101
 Subject: MERIC Data Partner Program: SNAP Employment and Training Services
 Staff Member: STACEY WIDEMAN Office Location: FSD Partner Southeast
 LWIA: Southeast Region
 Notes:
 Shared MERIC Realtime Pathway Summary - Health & Life Sciences with client.

Case Note ID: 6985611
 Create Date: 10/22/2018
 Case Note Type: Enrollment Last Edit Date/Time: 10/22/2018 3:59:14 PM
 Contact Date: 10/22/2018
 Contact Type: Face-to-Face
 Program: SNAP Employment and Training Application ID: 3241101
 Subject: Individual Employment Plan Partner Program: SNAP Employment and Training Services
 Staff Member: STACEY WIDEMAN Office Location: FSD Partner Southeast
 LWIA: Southeast Region
 Notes:
 Created IEP with client.

The S20 case note should indicate that SkillUP funds will be used for training purposes.

IMPORTANT: The 361 case note should be specific and include the funding source and timeframes covered with eligibility determination as noted in the Provider Handbook Case Notes section. For example...OTC Medical Assistant training approved through SkillUP funds for \$xxxx.xx. Classes with be held from xx/xx/xx-xx/xx/xx. No supportive services requested as textbooks and materials included in course fees. Eligibility verified by DCN.

IMPORTANT: Any time there is interaction with or an attempt at interaction with the participant, a case note should be made.

IMPORTANT: If you refer a participant to another provider for supportive services, that activity (referral for services) needs to be entered and a case note made as to why and for what.