

# Seven Elements of Case Noting

**1. Background Statement:**

(Individuals' situation, used to introduce new situational issues that arise and impact potential success)

**2. Reason Statement:**

(Purpose, function or reason for the meeting/contact; to validate things are getting done the way they were planned – or that plans are being adjusted to reflect reality)

**3. Observations Statement:**

(Take observations from an employers perspective – what would impact success in their program participation?; Observations are always objective: i.e. Customer was 10 min late)

**4. Content Statement:**

(Substance of the meeting itself, summary of key events in the interview/conversation; Can be a brief summary of what took place between the participant and Employment Counselor)

**5. Results Statement**

(Outcome of the meeting – an evaluation of how the meeting went related to the intended purpose or reason for the meeting. Did the meeting accomplish its intended purpose?)

**6. Impressions Statement**

(Overall assessment of the progress and accomplishments the individual is making towards goals/objectives; Directly related to the IEP – is the individual on schedule/ahead of schedule/behind? Are they achieving objectives and short-term goals?)

**7. Plan Statement**

(Next steps for the participant and/or the Employment Counselor; is there an assignment or task the individual need to complete? When will you plan to meet/talk again? Anything the individual needs to bring the next time?)