**File Review Form**

**Employment Specialist: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Region: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Date of Review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Reviewer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Customer Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **Review Item** | **Comments** |
| Case Note Review:* Do the notes identify when, where, how, etc. the ES contacted the customer?
* Do the notes list customer preferences/choices in contact?
* Do the notes indicate the current desires/needs of the customer for work with ES?
 |  |
| Case Note Review:* Do the case notes follow up on information given in previous notes?
* Do the case notes give enough information to assist the customer?
 |  |
| Case Note Review:* Do notes include information on barriers?
* Do the notes focus only on employment?
* Are any referrals made? If not does it explain why?
 |  |
| Case Note Review:* Is there any point when contact ceased?
* Is there any documentation on how the customer was re-engaged?
 |  |
| Case Note Review:* Does the ES identify when, where, how, etc. contact with the IDDT?
* Is the information sufficient to understand what was discussed and outcome of conversation?
* Does the team appear to be up to date on what is occurring with the customer?
 |  |
| Case Note Review:* Is there documentation included on the progress towards employment?
 |  |
| Case Note Review:* Is the ES assisting with job coaching?
* Is the ES assisting with budgeting?
 |  |
| Case Note Review:* Does there appear to be a person centered/customer service approach throughout the documentation?
* Does MI appear to be used?
 |  |
| Other Notes |  |