**File Review Form**

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

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

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

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| **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 |  |