



WORKFORCE INVESTMENT ACT (WIA)
SECTION 167
FARMWORKER JOBS AND EDUCATION PROGRAM
FLORIDA DEPARTMENT OF EDUCATION



DATE: August 13, 2013	FJEP Policy Memo No. 13-04
TO: Farmworker Jobs and Education Program (FJEP) Projects	
FROM: Mario Zuniga	
SUBJECT: Customer Records Database (CRD) Case Notes for WIA Section 167 (National Farmworker Jobs Program) Participants	
REFERENCE: FJEP Case Management System Manual, 2010-2011, pgs. 81-84, 179-185, 201-205	

Purpose: To clarify the requirements for completing case notes in the Customer Records Database (CRD) for Florida National Farmworker Jobs Program (NFJP) participants.

Background: The preponderance of current case notes filed in the CRD master records of qualified NFJP participants in Florida are not currently structured or organized in a way that clearly tells the entire story of the participant as they move through the FJEP program, particularly as it relates to how the employment goal/objective is arrived at and how it is reached.

Policy: Effective August 13, 2013, FJEP offices will complete case notes for all newly qualified NFJP participants in accordance with the guidance stipulated in this policy beginning with the intake process and culminating with the follow-up and retention process after the participant exits the program. If any portion of the case notes for any currently active qualified NFJP participant needs to be updated or revised, these notes must be revised and completed in accordance with this policy. This would include case note updates necessitated by pending exits or planned breaks in service. Case notes for NFJP participants who are eligible for "Related Assistance Only" or "Emergency Assistance Only" services may be completed using a Miscellaneous Comments category only.

All entries in the case notes are to be written using proper grammar and spelling. Case notes may be written in a Word document that has a 'spell check' feature, then copied/pasted onto the CRD case note screen. Periodic review of participant activities is expected (frequency to be determined by the Project Coordinator) and the information gathered during these reviews should be annotated in the case notes.

As a minimum, case notes should include the following type of information in the convention cited below:

INTAKE COMMENTS (with dates):

- Assessment Results
- Training Needs
- Career Options
- IEP Clarification
- Commitment Contract
- Other

MONITORING COMMENTS (with dates)

- Training Activity
- Subsidy Requirements
- Training Completion
- Other

PLACEMENT COMMENTS (with dates)

- Job Search Activity
- Job Placement
- Other

EXIT COMMENTS (with dates)

- Completion of CRD Exit Category Requirements
- 1st Qtr after Exit Employment Status Determination & CRD Update

RETENTION COMMENTS (with dates)

- Q1 after Exit
- Q2 after Exit
- Q3 after Exit

MISCELLANEOUS COMMENTS (if applicable)

- Planned Break in Service
- Participant Contact Issues
- Other

All Intake Comments should be annotated in the case notes as soon as possible after the participant eligibility determination is made and the Enrollment Application is completed. These comments should include potential employment goals and career counseling details. Subsequent changes to participant employment goals must be annotated in the case notes and be aligned with Individual Employment Plan (IEP) employment, education, and training goals.

During the initial interview, every effort should be made to sharpen the focus of the NFJP participant towards realistic, achievable, and specific employment goals in high-demand, high-wage professions and to obtain

the 'all-in' commitment of the participant to reach these goals. The case notes should summarize this initial interview and then tell the story of the continuous progression of the participant's journey through the steps identified in their IEP clearly documenting issues associated with the participant veering off the IEP track. In all cases, any revisions/updates made to the IEP should be fully documented in the CRD case notes, particularly as related to learning gains, training completions, job referral successes, and eventual job placement..

Along with the IEP, well-written and organized case notes which reflect the efforts made towards the attainment of good jobs, rather than just solely addressing participant need, serve as the foundation for describing meaningful participant activity and tell the story of how project funds are spent. In sum, staying abreast of participant progress and documenting all issues associated with this progression in the case notes (in an organized fashion) is critical for ensuring that program staff at all levels are confident that the career goals identified during the intake process are met upon participant exit.