



## Guidance Document for COVID 19 Case Notes

During the temporary provision of accepting client verbal/email permission for case service documents, the following are examples of documenting actions in AWARE:



### Category: Signed Application

Summary: COVID 19 Alternative Signature



#### Enter Case Note:

I spoke with CLIENT (enter the client's name) today. I explained the USOR application, the rights and responsibilities, service expectations, and answered client questions. Verbal permission was received to process the application. I mailed the client a copy of the signed document.

### 1. General

Entry Date\*   

Author

Category\*   

### 2. Note

Summary\*  

Enter Case Note

I spoke with CLIENT today. I explained the USOR application, the rights and responsibilities, service expectations, and answered client questions. Verbal permission was received to process the application. I mailed the client a copy of the signed document.

**Category: USOR-5 Financial Form**  
**Summary: COVID 19 Alternative Signature**

**Enter Case Note:**

I spoke with CLIENT (enter the client's name) today by phone. I reviewed the USOR Financial Form with the client and answered questions about the form. Verbal permission was obtained from the client. I entered the date in AWARE to finalize the form. I mailed the client a copy of the signed document.

**1. General**

**Entry Date\***   

**Author**

**Category\***  

**2. Note**

**Summary\***  

**Enter Case Note**

I spoke with CLIENT today by phone. I reviewed the USOR Financial Form with the client and answered questions about the form. Verbal permission was obtained from the client. I entered the date in AWARE to finalize the form. I mailed the client a copy of the signed document.

**Category: Signed Plans/Plan Amendments**

**Summary:** COVID 19 Alternative Signature

**Enter Case Note:**

I spoke with CLIENT (enter the client's name) by phone today to update the plan. We reviewed the service needed and I obtained verbal permission from the client to finalize the plan amendment with today's date. I mailed the client a copy of the signed document.

**1. General**

**Entry Date\***   

**Author**

**Category\***  

**2. Note**

**Summary\***  

**Enter Case Note**

I spoke with CLIENT by phone today to update the plan. We reviewed the service needed and I obtained verbal permission from the client to finalize the plan amendment with today's date. I mailed the client a copy of the signed document.