



Department Name  
**An Evaluation of Peer Mentor Case Notes**  
 Assessment Report

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**Choose One:** Learning Outcome Assessment

**Date of Assessment Implementation:** September 2017

**Date of Report:** June 2018

**Purpose of Assessment**

To determine if ARCHES Peer Mentors are learning to synthesize their case notes for each peer mentee appointment. Case notes provide valuable information about what assistance and progress ARCHES students are receiving and making associated with executive functioning problems such as time management, personal organization, and study skills coaching. Our goal is to train Peer Mentors the importance of case notes because they are added into the Disability Resource Center’s (DRC) database (AIM), it is imperative that peers are creating professional case notes.

**Division Learning Outcome** Intellectual & Practical Competencies

**Targeted Learning Outcome**

After participating in Case Management training, Peer Mentors will understand the documentation requirements of case notes and demonstrate their knowledge by writing case notes that will “meet standards” in all 5 categories (purpose, discussion, referral, homework, follow-up) by the end of the fall 2017 quarter.

**Assessment Methodology**

During the “Case Management” training, Peer Mentors are taught the documentation requirement for case notes and are given a rubric during training that will guide them on what information should be included each case note. Peer Mentors will also complete a pre and self-reflection on their strengths and areas of improvement in documenting their case notes, and they will also complete a post-reflection at the end of Fall quarter. In the first 3 weeks of the quarter, peer mentors are evaluated weekly and expected to complete 50% of case notes with “meet standards” in all 5 categories. From week 4-7, peer mentors are expected to complete 80% of case notes with no less than “meet standards” in all 5 categories. Their typed case notes will also be scored on a weekly basis by the Project Director and feedback will be provided.

Below is an example of the Case Note Rubric:

**Case Notes Rubric**

	<b>Exceed Standards</b> <i>0-1 Errors</i>	<b>Meets Standards</b> <i>2-7 Errors</i>	<b>Below Standards</b> <i>5-10</i>
Purpose	Provides clear and concise description of why the mentee is meeting with the mentor.	Brief summary that describes goal	Purpose not listed or unclear
Discussion	Captures the critical components of discussion with mentee with objective information. Incorporates student’s words (quotes) appropriately and with	Contains a few errors, but they do not interfere with reader’s ability to understand. Includes objective language and writing. Summarizes or	Confusing, many errors that make it difficult to understand context of conversation. Information sounds

	context. Also documents observations of atypical behaviors. Judgement free language	paraphrases discussion of the student's words or experience with objectivity.	subjective or judgmental.
Provided	Resources or referrals were provided and explanation of what actions to take	Resources or referrals were provided, but no details on what next steps are	No resources or referral provided or discussed
Homework	Created SMART Goals with student based on discussion and established a timeframe.	Helped student establish solution to presenting problem	Did establish goals or discuss solutions.
Follow Up	Scheduled follow up meeting with student and summarized discussion/homework.	Allowed student to decide whether they need to meet again.	Did not encourage student to meet again.

## Results

A total of 31 case notes were collected during the 2017 fall quarter. Between week 1-3 twelve case notes were collected and the average percentage of notes that "meet standards" was 46%. Their greatest challenge areas was in "discussion" (39%) and "follow up" (33%). The former was confusing and didn't capture mentee's presenting problem, the mentor's tone was subjective and quotes were not used to distinguish the student's thoughts/feeling, and the sentence structure and organization was weak. Follow up was weak because the peer mentor did not indicate any plan or instruction on what are the next steps for the mentee. The fell short of meeting the 50% standard goal. After each case note was evaluated, feedback was provided and PM's were required to rewrite their case notes. The second draft would be reviewed once more and they would correct the note until it was acceptable.

From week 4 through the end of the quarter, 19 case notes were collected. Overall, the peers increased their ranking by 37%, showing the greatest increase in the "follow up" category. Twenty-four percent of their case notes exceeded standards. They notes indicated next steps such as scheduling a follow up meeting and summarized discussion or homework assigned. The improved categories that we were most impressed by were "purpose" and "discussion". Peers were able to document clear and concise description of the meeting and captured the critical components of discussion while providing objective information. They incorporated quotes or paraphrasing from their mentee's appropriates and with proper context so the reader could understand. They still struggled with sentence structure and grammar, but overall there was great improvement. At the conclusion of the quarter, the peer mentors had met standards by 83%.

	Pre-Intervention		Post-Intervention	
	Meet Standard	Below Standard	Exceed Standard	Meet Standard
Purpose	47%	53%	48%	75%
Discussion	39%	72%	54%	69%
Referral	61%	39%		100%
Homework	50%	50%	17%	77%
Follow Up	33%	67%		94%
<b>Average</b>	<b>46%</b>	<b>56%</b>	<b>24%</b>	<b>83%</b>

## Conclusion

My observations of the Peer Mentor's (PM) during training was that they appeared confident in their ability to write case notes, when asked if they had questions, they said they "got it". The constant review and rewrites of the PM's case notes made them realize that writing case notes is not as simple as they assumed and that there are possible consequence with poorly written case notes. Their pre self-reflections somewhat mirrored what I was observing, KP said "it [my case note] was too much like a transcript, I...had phrases that did not sound objective." SS shared that "getting straight to the point was an area of improvement that I need[ed] to work on. They inability

to complete case notes scoring 50% in meet standards indicated that there was a flaw in the training component that needs to be improved for the next academic year.

I would explain to them that these case notes could be subpoenaed if there was ever a lawsuit with a DRC student, which frightened them a bit. Peer Mentors shared they had never done this before, this was a new concept and skill they needed to adjust to. By the end of the quarter, they met the standards by 83% and scored 24% under “exceeds standard”. Their post-reflections demonstrated their growth. *KP shared “I think I am consistent with keeping the notes objective, writing only key points of the sessions, and using ‘s/he said’ appropriately”. SS said “Documenting my case notes became a task...I try to finish them in one sitting because I lose my train of thought. I...need to make sure that my case notes have a flow to them. My thoughts sometimes don’t make sense...so I try to go back and catch myself.”*

Providing direct feedback and having the PMs re-write their case notes several times contributed a great deal in the improvement of the scores. One case note was included in a PolyCares report of an ARCHES participant, when the Associate Vice President of Campus Health and Wellness phoned me to discuss the student, she said that she thought a counselor had written them, with pride I shared that our PM that wrote the note. This was a point of pride for the PM and ARCHES.

### **Implications for Practice**

What has been key in assuring our Peer Mentors are learning and improving in developing this skill is mostly attributed to the practice of reviewing case notes and providing specific and measured feedback within the first weeks of PM employment. We emphasize to our PMs that this skill will be valuable if they pursue areas of social work or counseling because good case notes are a necessary component of the job. For ARCHES staff, these case notes help us know what improvements or challenges our students are having with managing the non-academic aspect of their lives.

### **Closing the Loop**

We believe that we are providing a skills set to our peers, providing timely feedback, and more importantly, helping them to understand how this skill will be used in their professional work. For the 2018-19 academic year, I want the Peer Mentors to be earning 80% within the first 3 weeks of the quarter and will integrate role play sessions, sample case notes, and more practice during training. This will always remain a requirement of their work because it fills the gap between what is discussed with PM’s and ARCHES/DRC staff to make sure our mentees are not falling through the cracks.