

G. Narration and Computer Entry

INTENT

The intent of narration and computer entry is to maintain a chronological, legal record of client case plan activity and program eligibility. This is necessary so that case management services and benefit issuance can be provided accurately, timely and successfully. This information is also necessary for program data collection locally and statewide to meet legal requirements, and to enable programs to be evaluated so their effectiveness can be continually enhanced.

1. Narration and computer entry requirements

The agency is responsible for keeping a current master file containing all important eligibility and benefit information on all clients receiving benefits.

Client benefits must be issued in a timely manner depending on the benefit and issuance type.

SNAP Expedited Services Rule

[461-135-0575](#) — SNAP Expedited Services

Case plans must be developed and updated in writing.

Definitions of Terms, Components, and Activities; JOBS, Pre-TANF, Post-TANF, TANF Rule

[461-001-0025](#) — Definitions of Terms, Components, and Activities; JOBS, Pre-TANF, Post-TANF, TANF

Case Planning; JOBS, Pre-TANF, REF, SFPSS, TA-DVS Rule

[461-190-0151](#) — Case Planning; JOBS, Pre-TANF, REF, SFPSS, TA-DVS

2. Narration and computer entry expectations

- Narration and computer entry are necessary to provide accurate information to partners, to evaluate case management services at the state and local level and to show how the case manager arrived at decisions relating to case management and eligibility.
- Records are kept of screening and assessment and eligibility information, case plans and client activities, support services and client progress.

- Narratives contain concise, descriptive, objective observations of the client's assessment and eligibility issues.
- Narratives show how the case manager arrived at decisions relating to case management and eligibility.
- Each branch has a system to ensure timely narration and actions resulting from client contacts with any branch staff and for all affected programs.
- All case plan activities, time lines, accommodation needs and support services payments are recorded in TRACS.

3. Actions to narrate

The following case management and eligibility actions are narrated in TRACS:

- Specific accommodations and whether they were provided, needed, refused, not needed or not provided.
- Results of screening, assessment, case plan development and eligibility determination.
- Domestic violence issues should be narrated, but in a way that protects the client's safety (they can be narrated on a separate sheet of paper in the case file, if necessary).
- Actions to issue and update program benefits.
- Results of client and provider contacts.
- Case plan and eligibility updates.
- Results of re-engagement efforts and disqualifications.
- Results of joint staffings with branch staff and providers.
- Reported client changes affecting eligibility.
- Ongoing evaluation of client progress toward case plan outcomes.
- Referrals to resources for client and family members.
- Community reports concerning client and family eligibility and functioning.
- The offer of a Learning Needs screening and whether client accepted or refused.
- Receipt of LD assessment report and planned actions.

- Receipt of client-provided disability documentation.

4. **Actions also needing computer entry**

The following case management and eligibility actions require computer entry:

- Reported client changes affecting eligibility (CMS and FSMIS).
- Case plan activities, changes in these activities, support services and attendance (TRACS).
- Results of re-engagement efforts and disqualifications that change disqualification and eligibility status (TRACS, CMS and FSMIS).

TRACS testing page

- Results of screenings to identify possible disabilities.
- Results of formal assessments to identify specific disabilities.

TRACS disability page

- When a disability is discovered.
- Need for accommodations.
- Whether accommodations or modifications were provided, needed, refused, not provided or not needed.
- Specific accommodations or modifications.

5. **Actions not to narrate**

Child or elderly abuse reports and HIV/AIDS status should not be narrated on TRACS. Before the case record is viewed by non-DHS persons, all reference to the suspected abuse or HIV/AIDS status must be removed from the case record.

DHS employees must not reveal to any person or agency that a client is HIV positive. Information on a client's HIV status is not narrated or included in the case record and is destroyed, unless it is needed for eligibility determination.

Confidentiality Rule

[333-012-0270](https://www.dhs.gov/333-012-0270) — Confidentiality

Release of Information to the Client Rule

[461-105-0060](#) — Release of Information to the Client

Client Authorization for Release of Client Information to Third Party Rule

[461-105-0070](#) — Client Authorization for Release of Client Information to Third Party

Release of Client Information to Service Providers and Legal Bodies Rule

[461-105-0110](#) — Release of Client Information to Service Providers and Legal Bodies

Disclosure of Client Information Rule

[461-105-0130](#) — Disclosure of Client Information



SEE [CONFIDENTIALITY OF CLIENT INFORMATION, SECTION B](#) OF THE GENERIC PROGRAM INFORMATION CHAPTER.