

P-2203 VERIFICATION AND CASE NOTES **(CATN) (continued)**

P-2203C Case Notes (CATN) (Reach Up rule 2203)

The goal of case notes is to establish a clear and complete record that follows the case actions. Complete case notes (CATN) to support eligibility, ineligibility, and benefit level determinations.

Provide a clear explanation in CATN of what you did and why you did it.

Information used to determine eligibility and benefit amount

- the source of information
- the verification that supports the information
- the method used to determine monthly income and expense amounts such as conversion, averaging, etc.
- why the information was used

Actions taken and the reasons to support those actions

- Interviews: who was interviewed, when the interview was completed, how completed (in-person or telephone).
- Collateral Contacts: who the collateral contact is, the telephone number, date of the contact, and the information the collateral contact provided.
- Questionable Information: Why is it questionable and how was it resolved?
- Differences: In order of the STAT, the resolution of any differences between information provided at the interview and the ESD 202, Application.

Medical Information

Medical information documented in CATNs should be limited to the information that is necessary to share with other staff for the purpose of processing eligibility or taking action on an individual's case.