

# CASE NOTES SHEET



## WHAT IS THIS DOCUMENT?

The Case Notes Sheet is an optional tool for you to use to prepare for a CRB review. You can fill out each section and take notes as you read through the documents for each case.

## DO I HAVE TO USE THIS DOCUMENT?

No, it is an optional tool. You must be prepared for your review day, but however you choose to take notes and prepare is entirely up to you!



## CASE NOTES SHEET TIPS



- You will receive a current version of the Case Notes Sheet in Word format in your CRB packet each month.
- Your notes are for your eyes only! No one will see or read your notes. Do not waste time making them pretty.
- Alter your Case Notes Sheet any way you prefer, and save your own version.
- If you find that you consistently need certain reminders during reviews, you might edit your Case Notes Sheet to include those reminders under specific findings, or at the top or bottom of the page.
- If you run into difficulty, reach out to your Field Manager or CRB Trainer for assistance right away! No need to suffer in silence.