

Workforce One

Case Note User Guide
MN & WIOA Youth
October 2019



A Case Note must be entered at least once every 30-days,
indicating whether the Contact Type is Live* contact

Enter a Case Note every time you have contact
with the participant, modify or add to their WF1
record, or when they submit something to you

Refer to the following WFS policies/guidance for additional information:

- **Enrollment**
- **Case Management**
- **Case File Monitoring**
- **Incentives**
- **Support Services**
- **Referral and Co-Enrollment**
- **Summer Work Experience**
- **Work Experience**
- **Exit**

Add Case Note	Page	1
Case Note Quick	Page	2
Case Note Search	Page	3

*Live contact is one-to-one contact between staff and participant (**the participant must respond**) in any of the following forms.

- In-person conversation between participant & staff;
- Telephone conversation between participant & staff (or voicemail from participant);
- Electronic message between participant & staff, including email (may not include mass emails, unless the participant responds directly to a mass email with an update), text message, instant message, or message sent via social media (e.g., Facebook, Twitter, etc); and/or
- Postal mail update from participant

ADD CASE NOTE

To add **Case Notes**, click on the **Add Case Note** tab and the panel below will appear.

Besides the items marked with a red asterisk, the **Contact Type** is also required when adding **Case Notes**.

Case Notes may also be added on the specific panel when opening Activities; creating online Plans; entering Support Services; and completing Exits. However, when adding a Case Note from one of the panels the **Status** will default to **Open**, but will auto-close after 30-days.

Case Note Add
Elsa Arendelle
Birth Date 12/21/1995

*Event Date

*Note Viewable By All Staff in Servicing Agency

Agency Ramsay County Workforce Solutions

*Program None Selected

Staff Associated Doheny, Laurie J

Category None Selected

Contact Method None Selected

*Contact Type None Selected

*Status Closed

Subject

*Note

Spell Check

Save Save and Remain on Page Save and Add New Case

The following items are required when adding case notes:

Event Date = Date that the details in the case note occurred

Note Viewable By = All Staff in Servicing Agency

Program = Select the correct Program

Staff Associated = YOUR Name

Category = Most appropriate item & should relate to Subject

Contact Method = Most appropriate item

Contact Type = Most appropriate item
This indicates if the contact was live contact

Status = Closed

Subject = Enter specific info relating to the Case Note (up to 75 characters)
Examples: **'Intake'** should be listed for the Case Note pertaining to the Intake Session;
'Support Service' should be listed for any Case Note pertaining to Support Services provided;
'Incentive' should be listed for any Case Note pertaining to Incentives provided

Enter case note detail

Remember to **SAVE**

CASE NOTE QUICK

The **Case Note Quick** panel provides a summary of the five most recent case notes created for the person with the most recent Event Date first.

Program and security permissions determine what a User can view.

Case Note Quick View

Contact: **Elsa Arendelle** Record ID 202013374
 Birth Date 12/21/1995

Case Note Quick

Case Note 1: 10/01/2019 When adding a training activity: write the dates of training, name or type
 Program: WIOA OSY
 Category: Activity
 Contact Method: [blank]
 Contact Type: [blank]
 Mass Case Note: No
 Note: When adding a training activity: write the dates of training, name or type of program, and name of the school or training facility in the Case Note box. The Case Note will be auto-added to the Case Note section of WF1.
 Staff Assigned: Laurie J Doheny Agency: Ramsey County Workforce Solutions
 Entry Date: 10/10/2019 03:43 PM By: Laurie J Doheny
 Last Updated: [blank] By: [blank]

Case Note 2: 08/22/2019 case note!!

Case Note 3: 06/17/2019 Intake
 Program: WIOA OSY
 Category: Intake
 Contact Method: [blank]
 Contact Type: Live Contact with Person
 Mass Case Note: No
 Note: This is a case note entered once Intake was completed.
 Staff Assigned: Laurie J Doheny Agency: Ramsey County Workforce Solutions
 Entry Date: 10/15/2019 09:08 AM By: Laurie J Doheny
 Last Updated: [blank] By: [blank]

Case Note 4: 06/17/2019 When creating a Plan, use this are to write a description of the plan. Thi
 Program: WIOA OSY
 Category: Employment/Service Plan
 Contact Method: [blank]
 Contact Type: [blank]
 Mass Case Note: No
 Note: When creating a Plan, use this are to write a description of the plan. This Case Note will be auto-added to the Case Note section of WF1.
 Staff Assigned: Laurie J Doheny Agency: Ramsey County Workforce Solutions
 Entry Date: 10/14/2019 04:52 PM By: Laurie J Doheny
 Last Updated: [blank] By: [blank]

If no **Subject** text has been entered, the first 75 characters of the 'note' text will display in the panel header

The panel header will display the **Subject** text when the staff has entered the **Subject**

CASE NOTE SEARCH

This panel allows Users to search for case notes within a person's record. Users with the appropriate privileges can add a new case note or print case notes after performing a search.

A search will not return more than 500 results. The system will display a message indicating that search criteria must be refined. Go to My Preferences if you would like to set a default date range for the range of case notes that display when the page opens.

Case Note Search
 Elsa Arendelle
 Birth Date 12/21/1995
 Record ID 202013374

Hide Search Criteria

Event Date: [] To []
 Entry Date: [] To []
 Category: None Selected
 Keyword: activity
 Within Program Service Dates: None Selected
 Within Funding Stream Service Dates: None Selected
 Program: All Values
 Staff: All Values
 Open Case Notes Only: No
 Mass Case Note Filter: All Values

Run Search

Hide Search Results

Show 25 100 200 500
 Displaying 1 to 1 of 1

Print	Event Date	Subject Line	Entered By	Status	Mass Case Note	Action
<input type="checkbox"/>	10/01/2019	When adding a training activity: write the dates of training, name or type of program, and name of t	Myself	Open	No	Edit Delete Close

Select All Deselect All

New Search Refine Search Add Case Note Print Selected

Enter specific Search criteria in any of the fields.

Click **Run Search**

A 'Keyword' search requires a minimum of 2 alpha characters (not case-sensitive). One asterisk (*) is optional anywhere after the first 3 characters. If a user enters more than one word, the search will treat all words as individual values with an 'or' between each one (so the search will return language that contains any of those words). However, if the user puts quotation marks around a word or phrase, the search will look for an exact match.

This example has a Keyword search of "activity", which resulted in displaying 1 item, that contain 'activity' in the Subject or in the Case Note.