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.

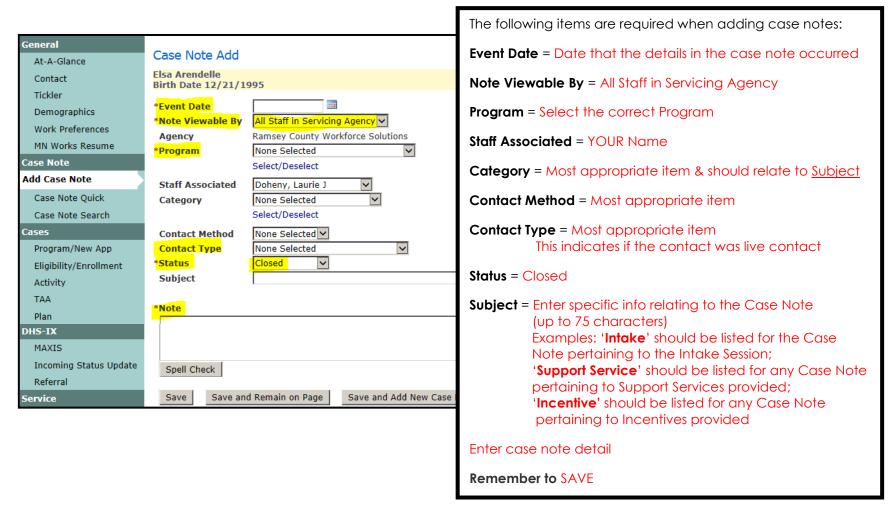
- In-person conversation between participant & staff;
- Telephone conversation between participant & staff (or voicemail from participant);
- Electronic message <u>between participant & staff</u>, including email (may not include mass emails, unless the participant responds directly to a mass email with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

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 <u>required</u> when adding **Case Notes**.

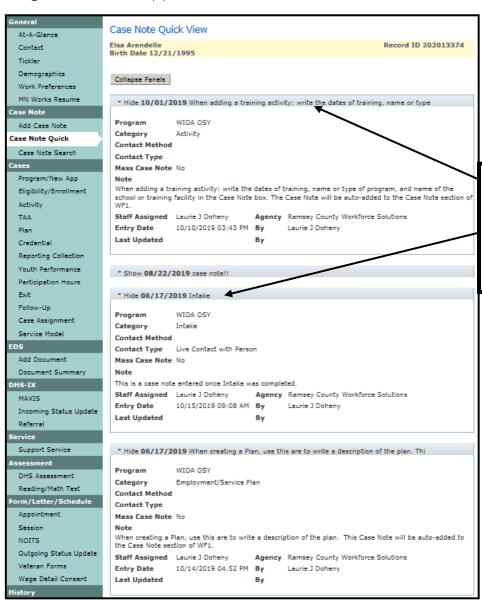
Case Notes may also be added on the specific panel when opening Activities; creating online Plans; entering Support Services; and completing Exits. However, when adding a Case Note from one of the panels the **Status** will default to **Open**, but will auto-close after 30-days.



CASE NOTE 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.



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.

