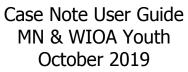
Workforce One





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 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 <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.

		The following items are required when adding case notes:		
General At-A-Glance	Case Note Add	Event Date = Date that the details in the case note occurred		
Contact Tickler	Elsa Arendelle Birth Date 12/21/1995	Note Viewable By = All Staff in Servicing Agency		
Demographics Work Preferences	*Event Date *Note Viewable By All Staff in Servicing Agency 🗸	<pre>Program = Select the correct Program</pre>		
MN Works Resume	Agency Ramsey County Workforce Solutions *Program None Selected	Staff Associated = YOUR Name		
Case Note Add Case Note	Select/Deselect Staff Associated Doheny, Laurie J	Category = Most appropriate item & should relate to <u>Subject</u>		
Case Note Quick Case Note Search	Category None Selected Select/Deselect	Contact Method = Most appropriate item		
Cases Program/New App Eligibility/Enrollment Activity	Contact Method None Selected Contact Type None Selected *Status Closed Subject	Contact Type = Most appropriate item This indicates if the contact was live contact Status = Closed		
TAA Plan DHS-IX MAXIS Incoming Status Update Referral Service	*Note Spell Check Save Save and Remain on Page Save and Add New Case	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.

General	Constitute On Advantage	
At-A-Glance	Case Note Quick View	
Contact	Elsa Arendelle Record ID 202013374 Birth Date 12/21/1995	
Tickler	birth Date 12/21/1995	
Demographics		
Work Preferences	Collapse Panels	
MN Works Resume	• Hide 10/01/2019 When adding a training activity: write the dates of training, name or type	
Case Note	The 10/01/2019 when abound a training activity: write the dates of training, name or type	
Add Case Note	Program WIOA OSY	
Case Note Quick	Category Activity	
Case Note Search	Contact Method	
Cases	Contact Type	
Program/New App	Mass Case Note No Note	If no Subject tout have been optared, the first 75
Eligibility/Enrollment	Note When adding a training activity: write the dates of training, name or type of program, and name of the	If no Subject text has been entered, the first 75
	school or training facility in the Case Note box. The Case Note will be auto-added to the Case Note section of	characters of the 'note' text will display in the
Activity	WF1.	panel header
TAA	Staff Assigned Laurie J Doheny Agency Ramsey County Workforce Solutions Entry Date 10/10/2019 03:43 PM By Laurie J Doheny	panerneader
Plan	Last Updated By	
Credential		The panel header will display the Subject text when
Reporting Collection		
Youth Performance	* Show 08/22/2019 case note!!	the staff has entered the Subject
Participation Hours		
Exit	* Hide 06/17/2019 Intake	
Follow-Up	Program WIOA OSY	
Case Assignment	Category Intake	
Service Model	Contact Method	
EDS	Contact Type Live Contact with Person	
Add Document	Mass Case Note No	
Document Summary	Note	
DHS-IX	This is a case note entered once Intake was completed.	
MAXIS	Staff Assigned Laurie J Doheny Agency Ramsey County Workforce Solutions Entry Date 10/15/2019 09:08 AM By Laurie J Doheny	
Incoming Status Update	Last Updated By	
Referral		
Service		
Support Service	* Hide 06/17/2019 When creating a Plan, use this are to write a description of the plan. Thi	
Assessment	Program WIOA OSY	
DHS Assessment	Category Employment/Service Plan	
Reading/Math Test	Contact Method	
Form/Letter/Schedule	Contact Type	
Appointment	Mass Case Note No	
Session	Note	
NOITS	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.	
Outgoing Status Update	Staff Assigned Laurie J Doheny Agency Ramsey County Workforce Solutions	
Veteran Forms	Entry Date 10/14/2019 04:52 PM By Laurie J Doheny	
Wage Detail Consent	Last Updated By	
History		

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.

General At-A-Glance		e Note Sea	arch						
Contact		Arendelle Date 12/21	/1995			Re	cord ID	202013374	
Tickler									Enter specific Search criteria in any of
Demographics	▼ H	ide Search C	ritoria						the fields.
Work Preferences		de bearen e							
MN Works Resume	Eve	nt Date			🔲 То				Click Run Search
Case Note	Entr	y Date			То				CIICK RUN Sedich
Add Case Note	Cate	gory		None Select					
Case Note Quick				Select/Dese	lect				A 'Keyword' search requires a minimum
Case Note Search	Keyword activity					of 2 alpha characters (not case-			
Cases	Within Program Service Dates None Selected				sensitive). One asterisk (*) is optional				
Program/New App	Within Funding Stream Service Dates None Selected								
Eligibility/Enrollment	Program All Values Staff All Values						anywhere after the first 3 characters. If		
Activity	Open Case Notes Only No V					a user enters more than one word, the			
TAA	Mass Case Note Filter All Values					search will treat all words as individual			
Plan							values with an 'or' between each one		
Credential	Run Search					(so the search will return language that			
Reporting Collection									contains any of those words). However,
Youth Performance	• н	ide Search R	tesults						if the user puts <u>quotation marks</u> around
Participation Hours	niue search results								
Exit	Show 0 25 0 100 0 200 @ 500 Displaying 1 to 1 of 1						a word or phrase, the search will look		
Follow-Up	Print		Subject Line		Entered By	Status	Mass	Action	for an exact match.
Case Assignment		Date					Case Note		
Service Model		10/01/2019	When adding a training		Myself	Open	No	Edit Delete	This example has a Keyword search of
EDS			write the dates of trainin type of program, and na					Close	"activity", which resulted in displaying 1
Add Document			Type or program, and ha		1		1	1	item, that contain 'activity' in the
Document Summary	S	elect All	Deselect All						Subject or in the Case Note.
DHS-IX									
MAXIS	New Search Refine Search Add Case Note Print Selected								
Incoming Status Update									