

# 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**

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\*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 Ramsey 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

**Collapse Panels**

Hide 10/01/2019 When adding a training activity: write the dates of training, name or type

Program WIOA OSY  
 Category Activity  
 Contact Method  
 Contact Type  
 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 By

Show 08/22/2019 case note!!

Hide 06/17/2019 Intake

Program WIOA OSY  
 Category Intake  
 Contact Method  
 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 By

Hide 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  
 Contact Type  
 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 By

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.