Workforce One
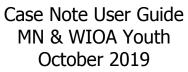## Case Note User Guide
MN & WIOA Youth
October 2019

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**

*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 <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.

General	
At-A-Glance	
Contact	
Tickler	
Demographics	
Work Preferences	
MN Works Resume	
Case Note	
Add Case Note	
Case Note Quick	
Case Note Search	
Cases	
Program/New App	
Eligibility/Enrollment	
Activity	
TAA	
Plan	
DHS-IX	
MAXIS	
Incoming Status Update	
Referral	
Service	

Case Note Add

Elsa Arendelle
Birth Date 12/21/1995

*Event Date	[blank] 🗓
*Note Viewable By	All Staff in Servicing Agency ▾
Agency	Ramsey County Workforce Solutions
*Program	None Selected ▾
	Select/Deselect
Staff Associated	Doheny, Laurie J ▾
Category	None Selected ▾
	Select/Deselect
Contact Method	None Selected ▾
Contact Type	None Selected ▾
*Status	Closed ▾
Subject	[blank]

*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 <u>Subject</u>

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.

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.

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.