

# Workforce One

## Case Note User Guide

### Adult/Dislocated Worker (DW)

October 2019



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

If the participant is enrolled in the Employed, Pending Exit activity, 30-day Contact is not required: refer to the **WF1 User Guide - Employed, Pending Exit Activity**

Refer to the following policies for additional information:

- **Enrollment**
- **Support Services**
- **Internal Case File Monitoring**

|                  |      |   |
|------------------|------|---|
| Add Case Note    | Page | 1 |
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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 items highlighted below are 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**  
Wizard O Oz  
Birth Date 03/01/1974

\*Event Date

\*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  Open  Closed

Subject

\*Note

Spell Check

Save Save and Remain on Page Save and Add Ne

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** = Adult or Dislocated Worker

**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

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**

Wizard O Oz Record ID 10000968  
 Birth Date 03/01/1974

▼ Hide 08/01/2019 This info was included in the 'Additional Description' when adding the Supp

**Program** Adult  
**Category** Support Service  
**Contact Method**  
**Contact Type** Live Contact with Person  
**Mass Case Note** No  
**Note**  
 This info was included in the 'Additional Description' when adding the Support Service, by checking the 'Include as Case Note' box.  
**Staff Assigned** Laurie J Doheny **Agency** Ramsey County Workforce Solutions  
**Entry Date** 08/02/2019 10:13 AM **By** Laurie J Doheny  
**Last Updated** 08/02/2019 10:16 AM **By** Laurie J Doheny

▼ Hide 07/10/2019 Support Service

**Program** Adult  
**Category** Support Service  
**Contact Method** In Person  
**Contact Type** Live Contact with Person  
**Mass Case Note** No  
**Note**  
 Support Service info goes here. Remember to enter Support Service for the Subject.  
**Staff Assigned** Laurie J Doheny **Agency** Ramsey County Workforce Solutions  
**Entry Date** 08/02/2019 10:11 AM **By** Laurie J Doheny  
**Last Updated** **By**

▼ Hide 07/10/2019 Intake

**Program** Adult  
**Category** Intake  
**Contact Method** In Person  
**Contact Type** Live Contact with Person  
**Mass Case Note** No  
**Note**  
 Intake info goes here. Remember to enter Intake for the Subject.  
**Staff Assigned** Laurie J Doheny **Agency** Ramsey County Workforce Solutions  
**Entry Date** 07/26/2019 12:10 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.

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Service Model

**EDS**

Add Document

Document Summary

**DHS-IX**

MAXIS

Incoming Status Update

Referral

### Case Note Search

Wizard O Oz Record ID 10000968

Birth Date 03/01/1974

▼ Hide Search Criteria

Event Date  To

Entry Date  To

Category None Selected

Keyword

Within Program Service Dates None Selected

Within Funding Stream Service Dates None Selected

Program All Values

Staff All Values

Open Case Notes Only  Yes  No

Mass Case Note Filter All Values

▼ Hide Search Results

Show  25  100  200  500  
Displaying 1 to 3 of 3

| Print                    | Event Date | Subject Line  | Entered By | Status | Mass Case Note | Action            |
|--------------------------|------------|---|------------|--------|----------------|-------------------|
| <input type="checkbox"/> | 08/01/2019 | This info was included in the 'Additional Description' when adding the Supp | Myself     | Open   | No             | Edit Delete Close |
| <input type="checkbox"/> | 07/10/2019 | Support Service   | Myself     | Closed | No             |                   |
| <input type="checkbox"/> | 07/10/2019 | Intake  | Myself     | Closed | No             |                   |

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 "info", which resulted in displaying 3 items, that contain 'info' in the Subject or in the Case Note.

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Workforce Solutions, MIS Unit 10/2019