# 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 <u>Employed, Pending Exit</u> 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
Case Note Quick	Page	2
Case Note Search	Paae	3

\*Live contact is one-to-one contact between staff and participant (the participant must respond) in any of the following forms.

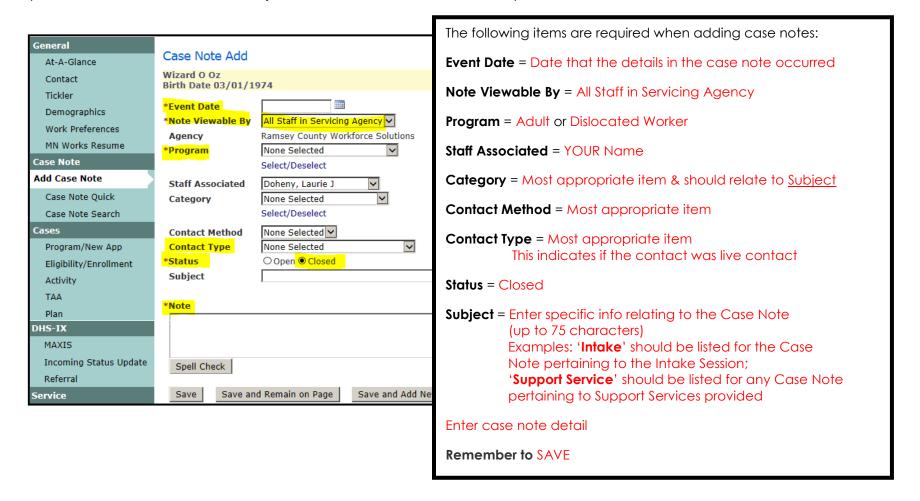
- In-person conversation between participant & staff;
- Telephone conversation <u>between participant & staff</u> (or voicemail from participant);
- Electronic message <u>between participant & staff</u>, including email (may not include mass emails, unless the participant responds directly to a mass 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 items highlighted below are also <u>required</u> when adding **Case Notes**.

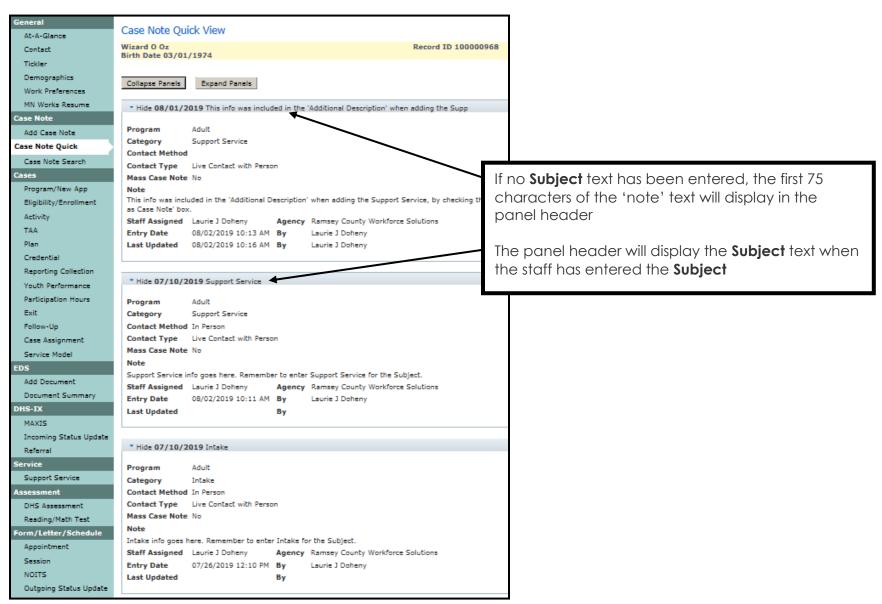
**Case Notes** may also be added on the specific panel when opening Activities; creating online Plans; entering Support Services; and completing Exits. However, when adding a Case Note from one of the panels the **Status** will default to **Open**, but will auto-close after 30-days.



# **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.

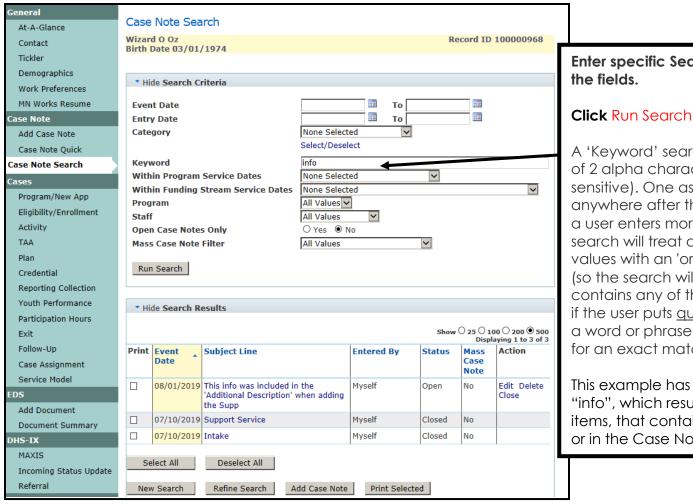
Program and security permissions determine what a User can view.



## **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

A 'Keyword' search requires a minimum of 2 alpha characters (not casesensitive). 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.