Questions and Answers regarding 'Maintaining Effective Case Notes'

November 18, 2022

1) During regular service I am usually able to create One Case Note and record that case note for a list of multiple participants (example: I provide a job fair flyer electronically to twenty participants and simply enter one case note for that action which is recorded for all twenty participants); however I cannot do so for participants in Follow-Up. Is there a way to do so or a reason why I cannot?

   DLT Response: Unfortunately, this is hard-coded element of EmployRI that relates to how case files for 'active/regular' participants are recorded and reported versus participants who are in follow-up. It's a back-end division that is not changeable; however if our vendor addresses it in future versions of the MIS we will let our partners know.

2) Related to question one above; when I *am* able to create One Case Note for multiple participants there appears to be no space where I can attach a document. (example above; I would like to attach a copy of the job fair flyer). I have to attach the document individually for each participant. Is there a way to do so or a reason why I cannot?

   DLT Response: This is not a function that can currently be done in EmployRI. The Department is looking into the matter to find out if the feature could be added upon request or if it's a function that would have to be added in future builds by the vendor (like the example in question one). If we receive any updates on this matter, we will let our partners know.

3) During one interaction; many different case note-worthy actions may occur. I may discuss job opportunities with the participant; provide a referral to a food bank; provide transportation assistance, etc. Should these all be recorded in a single case note (if so; how should it be titled?) or would I have to create separate case notes for each 'action' that occurred during that one interaction?

   DLT Response: Yes, all of this can be recorded in one case note. The title should be as representative/descriptive as the space will reasonably allow.

4) In EmployRI; when entering a WIOA Activity; such as an Objective Assessment or completing an ISS; when staff reaches the Closure Information tab there is an opportunity to add a case note. Many staff enter case notes this way; can OPIC confirm that case notes entered this way are being recorded and maintained in the same location as other case notes?

   DLT Response: OPIC can confirm that all case notes will show up under the "case notes" tab in EmployRI, no matter the location within EmployRI, as long as they are entered when the activity code is entered.