Creating and Viewing Case Notes/Structured Case Notes

A case note (aka Narrative) is used to document critical case management contacts made throughout the life of a case. While case assignment is not required to create a note, it may limit information presented in the Structured Case Note format.

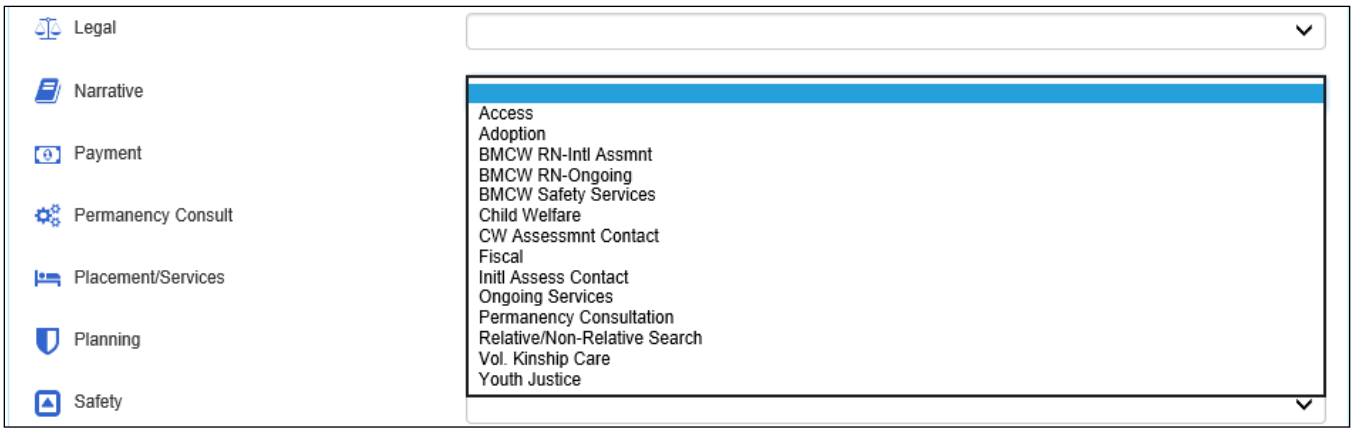
Related User Guides

- Creating Correction Notes
- Documenting Monthly Case Worker Contacts
- Recording & Reporting Face-to-Face Contacts
- Initial Face-to-Face Contacts

Creating a Case Note with a Case Assignment

1. From the desktop, go to the Cases tab and click the Create Case Work hyperlink Create case work or select Create Case Work from the Actions drop-down next to the specific case to open the Create Case Work page.

2. On the Create Case Work page, select the appropriate note Category from the Narrative drop-down and the Case. Selecting Case Participants is optional; use the 'ctrl' key to select more than one participant. Click Create to open the Case Notes page.

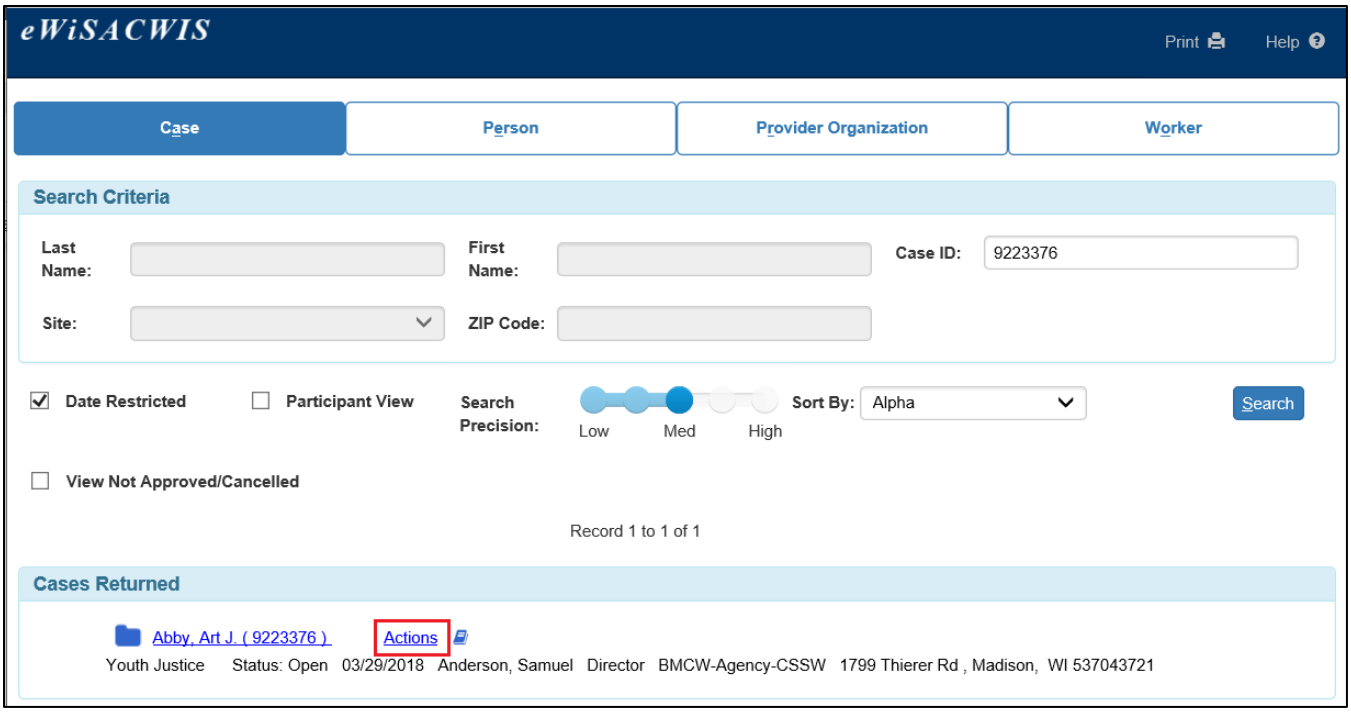


Creating Case Notes from Search

Note: Case Assignment is not required when creating a note via the Search page.

Note: The case can be in Open or Closed Status.

1. From the desktop, click the Search menu item Search to open the Search page.
2. Search out the case by using the Case Name or Case ID number. Once the desired case is identified in Cases Returned group box, select the Actions hyperlink to the right of the Case Name to open the Actions pop-up page or click on the Create Case Note icon to the right of the Actions hyperlink to open the Case Notes page.



On the Actions page, select Create Case Note and click Continue to open the Case Notes page.

Creating a Case Note

A Case Note can be entered in two ways: from the Case Notes "base" page (shown below), or in the Structured Case Note page (see the Creating a Structured Case Note section of this guide for more information). This section will describe the base Case Notes page.

Several fields will prefill automatically such as the Case name, Worker Creating Note, Worker Making Contact.

eWiSACWIS | Case Notes

eWiSACWIS

Print | Help

Case: Abby, Art J (9223376) | Worker Creating Note: Cake, Caitlin C. | Worker Making Contact: Cake, Caitlin C. Search

Case Note ID: | Date Entered: 06/15/2023 02:27 PM | Note Finalized | Contact By Designee

Note Information

Date: 00/00/0000 | Category: Access | View Inactive Participants

Begin Time: 00:00 AM PM | Type: | Participants:

End Time: 00:00 AM PM | Type Detail: | Abby, Art J. (ReferencePerson) Mooretest, Maddie M. (Bio Child) Mooretest, Morgan (Bio Child)

Duration: 0000.0 | Face-to-Face Location: Details

Billable | Face-to-Face Result: | Hold down the 'Ctrl' key for multi-selection

Narrative

Case Note 1/1 Details | Create Structured Case Note

Insert Correction Note | Clear Fields | Create | Save | Close

Note: Worker Making Contact #1; There is an option to Search out the Worker Making Contact, if different than the Worker Creating the Note. Click the Search hyperlink to search and update the Worker Making Contact when applicable.

Note: Contact By Designee #2; To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

1. Enter the Date, Time, Category and Type and associated information.
2. Select Participants (if not already selected) from the list. Hold down the 'Ctrl' key to Multi-Select.
3. Click Save to save information entered on the page (the Note is not yet finalized). This allows for editing up to 30 days after the case note was created, or until the Note Finalized checkbox is checked.
4. To finalize the Note, select the Note Finalized checkbox, and Click Save.

Note: When the Note Finalized checkbox is selected or 30 days have past, the note will be frozen and no longer editable. However, a Correction Note can be inserted if necessary (please see the associated Creating Correction Notes User Guide).

Creating a Structured Case Note

A Structured Case Note (SCN) allows for a note to be entered in an organized structure and associates the note to Subject(s) of Contact (child/youth discussed) and related Safety, Case/Permanency Planning, and or Well-being information.

Benefits of entering a note in the Structured Case Note format includes:

- Presents Safety and Case/Permanency Planning information as of the Case Note date (point-in-time) for the subjects of contact to assist a worker in writing the note narrative.
- Presents Well-being information and prefills Health Concerns entered via the SCN and medications lists for selected contacts to the base Case Note narrative.
- Allows a Case Notes Search by the subject of the contact; related Safety, Case/Permanency, or Well-Being; and by specific areas under each category. A search can be done directly from the Case/Permanency pages or from Case Note Criteria Search page.
- Presents Create, View, Edit hyperlinks to assist a worker in viewing existing or pending case work and, if desired, an easy way to create new pieces of work.

Note: Case assignment is not required to create a Structured Case Note; however, access to associated pieces of work in the note may be limited.

Note: Once a note is created in the Structured Case Note format, it cannot be changed to the base Case Note format. Additionally, most changes will need to be done via the Structured Case Note page.

Note: Only the narrative text, and any identified Health Concerns and Medication Lists for the subjects of contacts will prefill to the base case note page.

Completing a Structured Case Note

Note: A Structured Case Note is launched from the base case note page (see below). All required fields in the Note Information group box are required prior to launching a Structured Case Note. Narrative text can be entered but is not required.

1. The following is considered the “base” Case Note page. Click Create Structured Case Note hyperlink to launch the Subject(s) of Contact and to create a Structured Case Note.

Case Notes - Internet Explorer

eWiSACWIS

Print Help

Case: Abby, Art J (9223376) Worker Creating Note: Cake, Caitlin C. Worker Making Contact: Cake, Caitlin C. Search

Case Note ID: Date Entered: 07/02/2020 09:20 AM Note Finalized Contact By Designee

Note Information

Date: 00/00/0000 Category: View Inactive Participants

Begin Time: 00:00 AM PM Type: Participants:

End Time: 00:00 AM PM Type Detail:

Abby, Art J. (Refernce Person)
Mooretest, Maddie M. (Bio Child)
Mooretest, Morgan (Bio Child)

Duration: 0000.0 Face-to-Face Location: Details

Billable Face-to-Face Result: Hold down the 'Ctrl' key for multi-selection

Narrative

Case Note 1/1 Details Create Structured Case Note

Document case note here....

Insert Correction Note Clear Fields Create Save Close

100%

2. The Subject(s) of Contact page lists participants on the case as well as relationship, Date of Birth, and the Age at Contact (age as of the note date). Select the checkboxes for the Subject(s) of Contact (i.e. who you talked about) being addressed in the note.

Subject(s) of Contact Print Help

Subject(s) of Contact

Information in this Structured Case Note pertains to (at least one Subject of Contact must be selected):

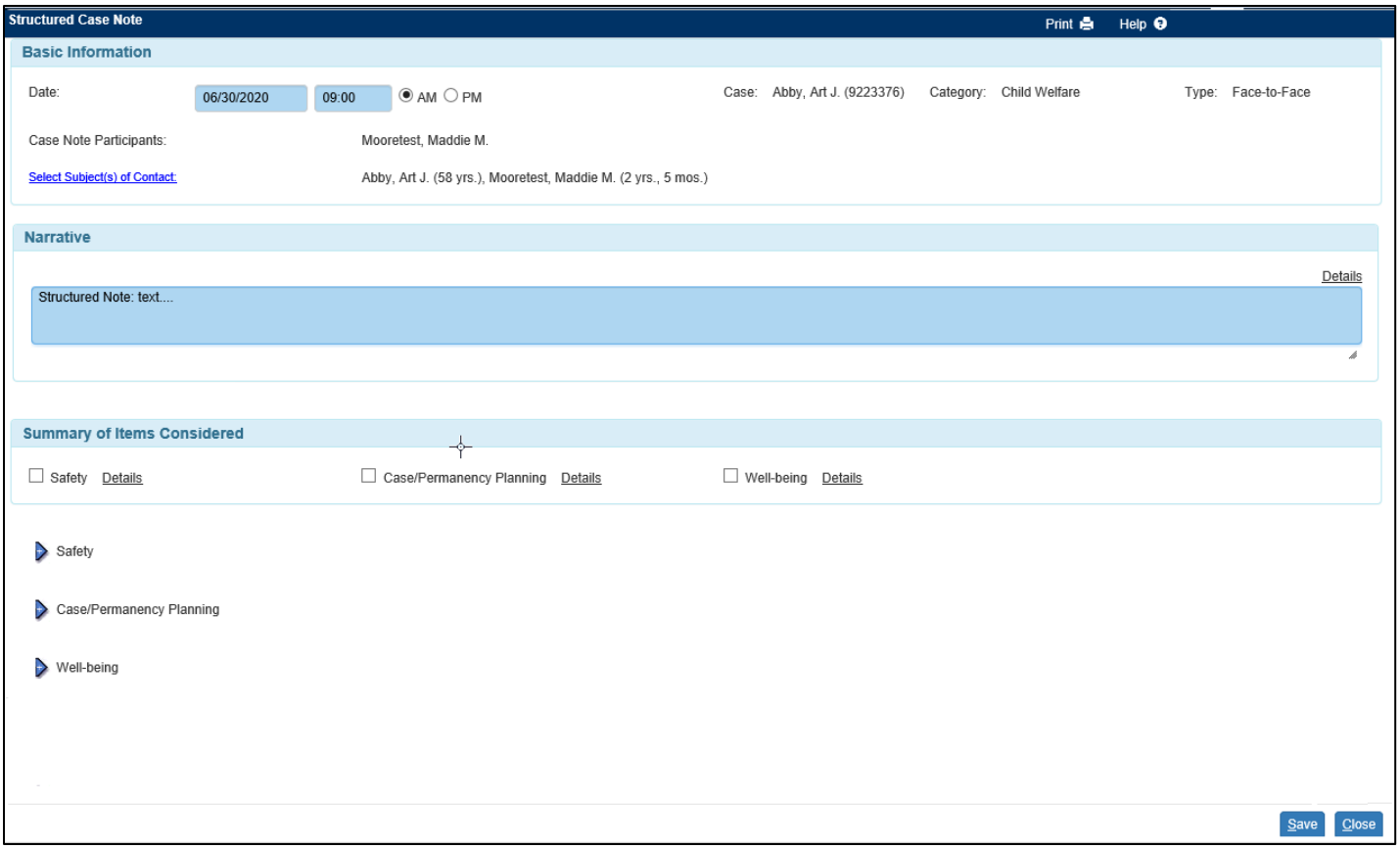
	Name	Relationship	DOB	Age at Contact
☑	Abby, Art J. (20998)	Reference Person	11/11/1961	58 yrs.
☑	Mooretest, Maddie M. (9221584)	Biological Child	02/01/2018	2 yrs., 5 mos.
☐	Mooretest, Morgan (9223128)	Biological Child	06/05/1980	40 yrs.

Continue Close

3. Click Continue to open the Structured Case Note page.

Note: The Age at Contact is the age as of the case note date. For anyone under 21 years old, years and months will be listed, and anyone under 1 year, months only.

Note: If applicable, Inactive participants are listed separately after Active Case participants.



4. Basic Information:
   - Date and Time: Prefills from the base Case Note page.
   - Case Name: Prefills from the base Case Note page.
   - Category & Type: Prefills from the base Case Note page.
   - Case Note Participants: Prefills with the Participants selected from the base Case Note page.
   - Select Subject(s) of Contact displays the subjects selected on the Subject(s) of Contact page. Subjects can be changed by clicking the hyperlink to reopen the selection page.

Note: Once created and saved as a Structured Case Note, changes to the date and time of the note must be done on the Structured Case Note page. Changes to Category, Type, and Participants can be made on the base Case Note page.

5. Narrative Box: By default, prefills "Structured Case Note:" and any text if entered in the Narrative on the base note page. Enter narrative here.

6. Summary of Items Considered: One or multiple checkboxes may be selected to indicate areas addressed: Safety, Case/Permanency Planning, and Well-being. If desired more information regarding these areas can be entered under the following expandos .

Safety, Case/Permanency Planning, and Well-being

Note: Selecting the 'Yes' radio button and a checkbox for a Subject(s) of Contact, allows for the note to be searchable by that subject and area addressed through Case Note Search.

Hyperlinks and information displayed throughout the sections, depend on several factors such as:

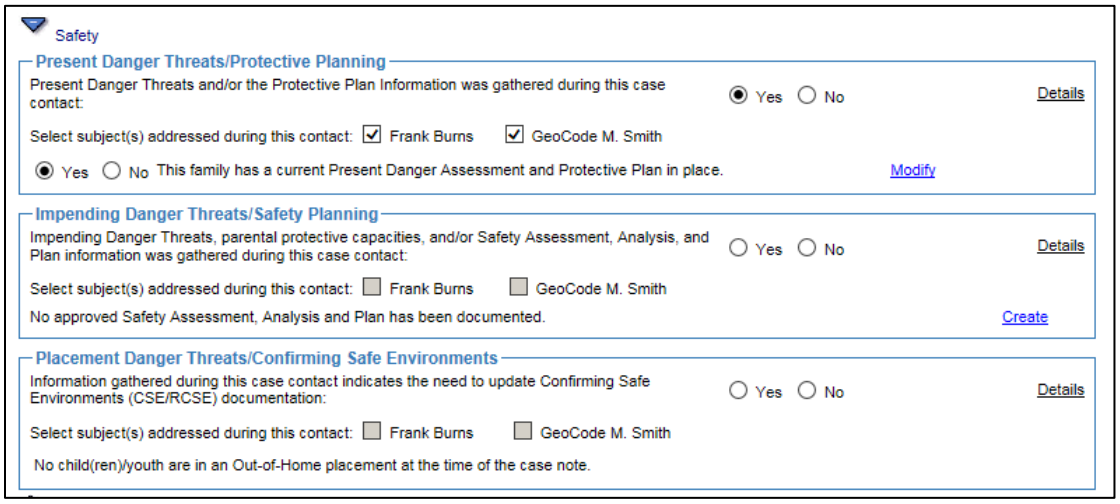
- Date of the Structured Case Note
- Subject(s) of Contacts selected
- Existing eWiSACWIS case work (some work needs to be approved at least one day prior to the SCN Date in order to display)
- The ability to view and create work from the SCN based on assigment and worker security
- Child's placement (in or out-of-home) as of the Structured Case Note date

Note: Hyperlinks may be available to Create or Modify pieces of work, but will not update the note if they are documented and approved after the case note date.

Safety

Safety includes Present Danger Threats/Protective Planning, Impending Danger Threats/Safety Planning, and Placement Danger Threats/Confirming Safe Environments sections.

Based on the subjects selected and Structured Case Note date, available Safety information prefills to the Structured Case Note. For instance, if an approved Protective Plan is in place for the case a View link may appear, or if an approved Safety Assessment, Analysis, and Plan is in place a summary will prefill with the related safety outcome.



Case/Permanency Planning

Case/Permanency Planning includes Permanency Goals, ASFA Exceptions, Relative/Non-Relative Search, Goals and Services, and Review/Hearing sections.

Case/Permanency Planning

Permanency Goals

Permanency Goal(s) information was gathered during this case contact: ◯ Yes ◯ No

Select subject(s) addressed during this contact:

☐ Frank Burns		Create	
☐ GeoCode M. Smith		Create	

ASFA Exceptions

ASFA Exceptions information was gathered during this case contact: ◯ Yes ◯ No

Select subject(s) addressed during this contact:

☐ Frank Burns			
☐ GeoCode M. Smith	ASFA Completed		09/20/2017

Relative/Non-Relative Search

Relative/Non-Relative Search information was gathered during this case contact: ◯ Yes ◯ No

Select subject(s) addressed during this contact:

☐ Frank Burns		Create	
☐ GeoCode M. Smith			Modify

Goals and Services

Goals and Services information was gathered during this case contact: ◯ Yes ◯ No

Select subject(s) addressed during this contact:

☐ Frank Burns		Create	
☐ GeoCode M. Smith		Create	

Review/Hearing

Review/Hearing information was gathered during this case contact: ◯ Yes ◯ No

Select subject(s) addressed during this contact:

☐ Frank Burns		Create	
☐ GeoCode M. Smith		Create	

Well-being

Well-being includes Health Concerns, Medications, Education, Family Interaction, and Independent Living. Subject names appear as hyperlinks that open their Person Management record.
Select the checkbox next to the name to indicate if an area was addressed with the subject of contact.

Well-being

Health Concerns

Only Health Concerns created via the person's name hyperlink (below) to their Person Management page will prefill to this note.

Select subject(s) addressed during this contact: ☐ Frank Burns ☐ GeoCode M. Smith

Burns, Frank
No Health Concerns have been created via this note.

Smith, GeoCode M.
No Health Concerns have been created via this note.

Medication(s)

The medication list below the name includes the medication names, dosage/frequency, and start date. End dates only appear if the medication was ended 30 days prior to or on the case note date. Select the name hyperlink to access their Person Management page to update/add medication information.

Select subject(s) addressed during this contact: ☐ Frank Burns ☐ GeoCode M. Smith

Burns, Frank
There are no current medications documented.

Smith, GeoCode M.
aasdf 05/30/2017 - present

Education

Education information was gathered during this case contact: ○ Yes ○ No

Select subject(s) addressed during this contact: ☐ Burns, Frank ☐ Smith, GeoCode M.

Family Interaction

Family Interaction information was gathered during this case contact: ○ Yes ○ No

Select subject(s) addressed during this contact:

☐ Frank Burns Create

☐ GeoCode M. Smith Create

Note: Only Health Concerns entered via the note for selected subjects of contacts appear in the case note, and prefill to the base Case Note page.

Note: If listed, only current medications and those ended 30 days prior to the case note date will appear, otherwise “There are no current medications documented” statement will appear. Only medications for those selected as subjects of contacts prefill to the base Case Note page.

7. Once all information is completed, click Save on the Structured Case Note page to return to the base Case Note page. Narrative, any health concerns documented via the note, and medications selected for Subject(s) of Contact are viewable in the Case Note Narrative section. Additionally, a summary statement “Information in this Structured Case Note pertains to: [displays names of selected Subject(s) of Contact] and addresses [areas addressed in the note].

8. Prior to note finalization, the note can be modified by clicking the Modify Structured Case Note hyperlink from the base note page.

eWiSACWIS | Case Notes

Print | Help

Case: Aardvark, Amy B (9222933) | Worker Creating Note: Cake, Caitlin C. | Worker Making Contact: Cake, Caitlin C. Search

Case Note ID: 9226518 | Date Entered: 08/11/2022 11:09 AM | Note Finalized | Contact By Designee

Note Information

Date: 08/01/2022 Details | Category: Ongoing Services | View Inactive Participants

Begin Time: 09:10 AM PM | Type: Other | Participants:

End Time: 00:00 AM PM | Type Detail:

Duration: 0000.0 | Face-to-Face Location: Details

Billable | Face-to-Face Result:

AutoChLastrqysr, AutoFirstrqysr (Mandated Reprtr)
Bluebird, Bennie (Step Child)
Buckeye, The (Aunt)
Jackson, Jack (Bio Child)
Johnson, Baby (Bio Child)
Money, Baby (Adoptive Child)

Hold down the 'Ctrl' key for multi-selection

Narrative

Case Note 1/1 Details | Modify Structured Case Note

Structured Note: test

Health Concerns:

Not addressed.

Options: Go | Insert Correction Note | Clear Fields | Create | Save | Close

Note: Once a note has been marked on the base Case Notes page as Note Finalized, a View Structured Case Note hyperlink is available to view the note in the structured format, but hyperlinks to associated pieces of work will no longer be available.

Searching Structured Case Notes from a Case or Permanency Plan

Structured Notes can be searched directly from a Case or Permanency Plan. Selecting Safety, Case/Permanency Planning, or Well-being will return Structured Case Notes for the specific type.

eWiSACWIS | Case / Permanency Plan

eWiSACWIS

TM Print Help

Basic

Case Name: Aardvark, Amy, B. (9222933) Plan Type: CPS, IH **Plan Date:** 03/17/2020 Details

Case Notes: Safety Case/Permanency Planning Well-being Case Note Search

Plan Due Date: 03/01/2020

Basic | Well-Being | Safety | Planning & Services

1. The Case Note Search Criteria page pre-selects some information based on the hyperlink selected. The date range defaults 6 months from today's date. The range can be adjusted to expand or narrow a search. Click Search or modify search criteria as desired.

eWiSACWIS | Case Note Search Criteria

eWiSACWIS

Print Help

Note Criteria

Case: Aardvark, Amy Number: 9222933 Start Date: 12/17/2022 End Date: 06/15/2023

Hold down the 'Ctrl' key for multi-selection

Category and Type Criteria

Categories

Access
Adoption
Appeal
CW Assessment Contact
Child Welfare
DMCPS RN-Intl Assmnt
DMCPS RN-Ongoing
DMCPS Safety Services
Fiscal

Add >

Add All >>

< Remove

<< Remove All

Selected Categories

Access
Adoption
Appeal
CW Assessment Contact
Child Welfare
DMCPS RN-Intl Assmnt
DMCPS RN-Ongoing
DMCPS Safety Services
Fiscal

Types

Access - Collateral
Access - Correspondence
Access - Face-to-Face
Access - Initial Case Transfer
Access - Other
Access - Telephone Call
Access - Text Message

Case Participants

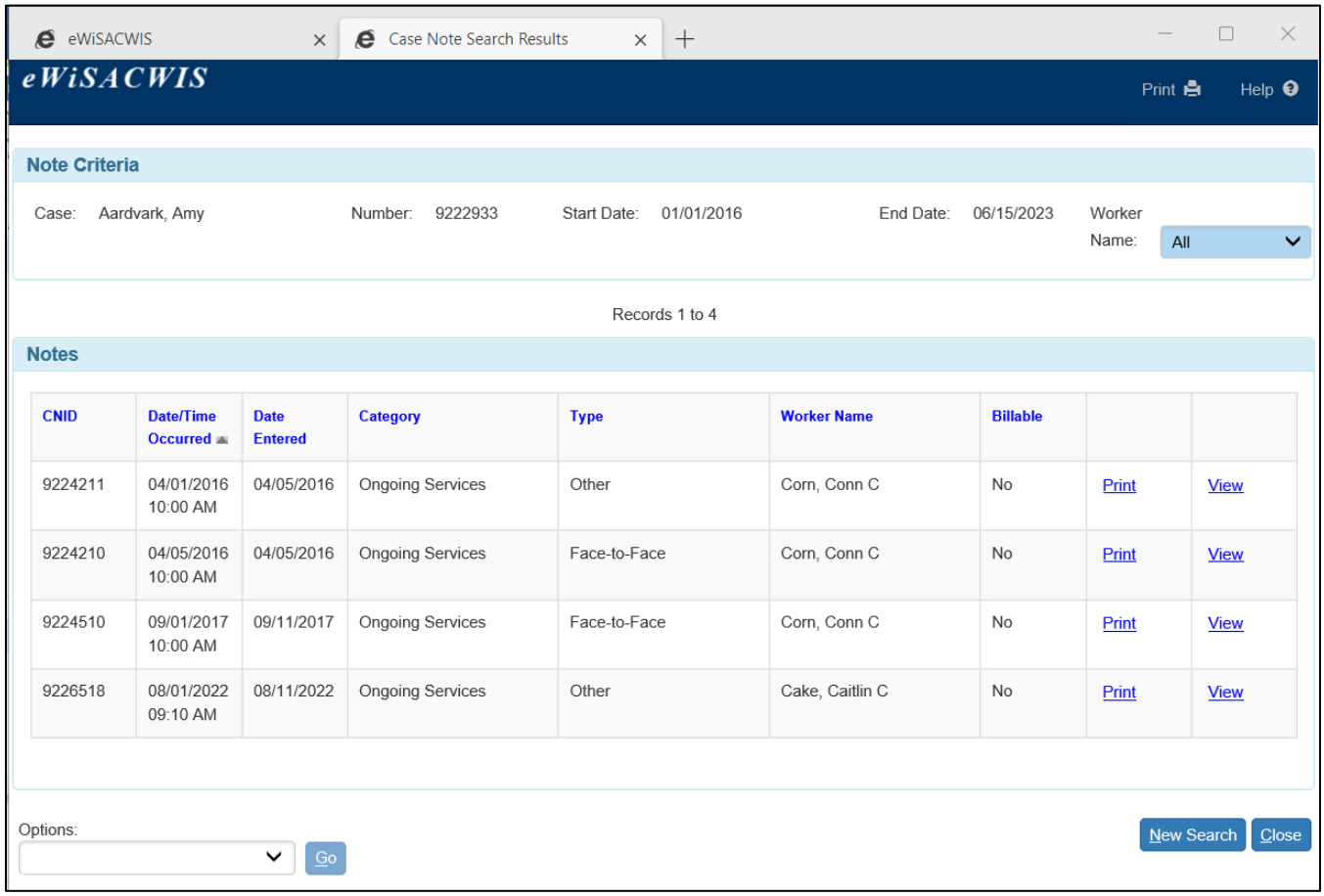
Aardvark, Adam A.
Aardvark, Amy B.
Aardvark, Abigail A., Jr.
Aardvark, Alan
AttorneyTest, TestAttorney
AutoAdLastfqroy, AutoFirstfqroy
AutoAdLastrqysr, AutoFirstrqysr
AutoChLastrqysr, AutoFirstrqysr

Search Close

Note: Selecting the Case/Permanency Planning hyperlink from a Case Plan, will pre-select all children on the plan. For a Permanency Plan, only the named child will be pre-selected.

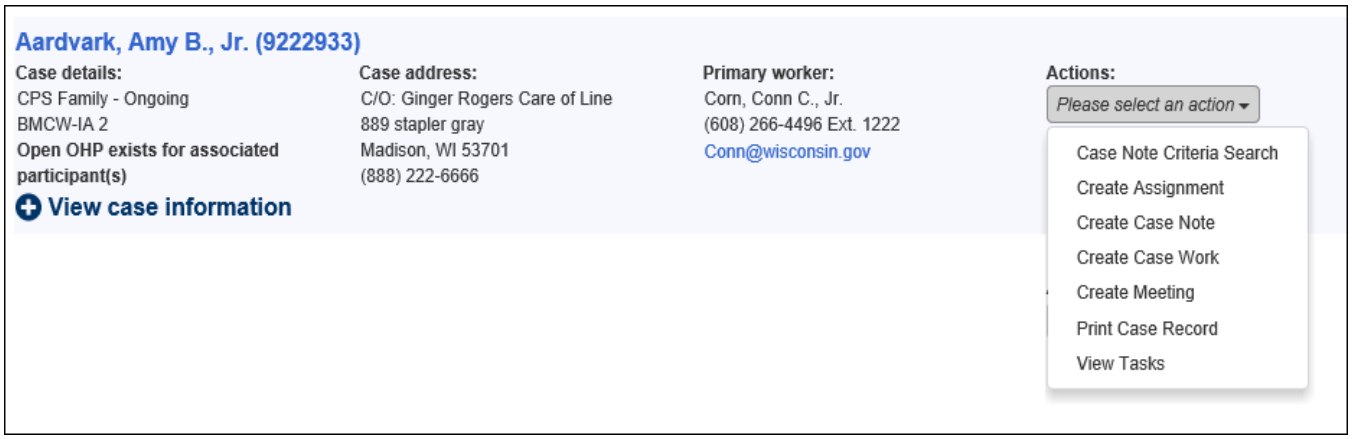
Note: Selecting the Case Note Search hyperlink pre-selects all Types values.

2. When Search is selected, the Case Note Search Results page displays all results that match the search criteria selected.



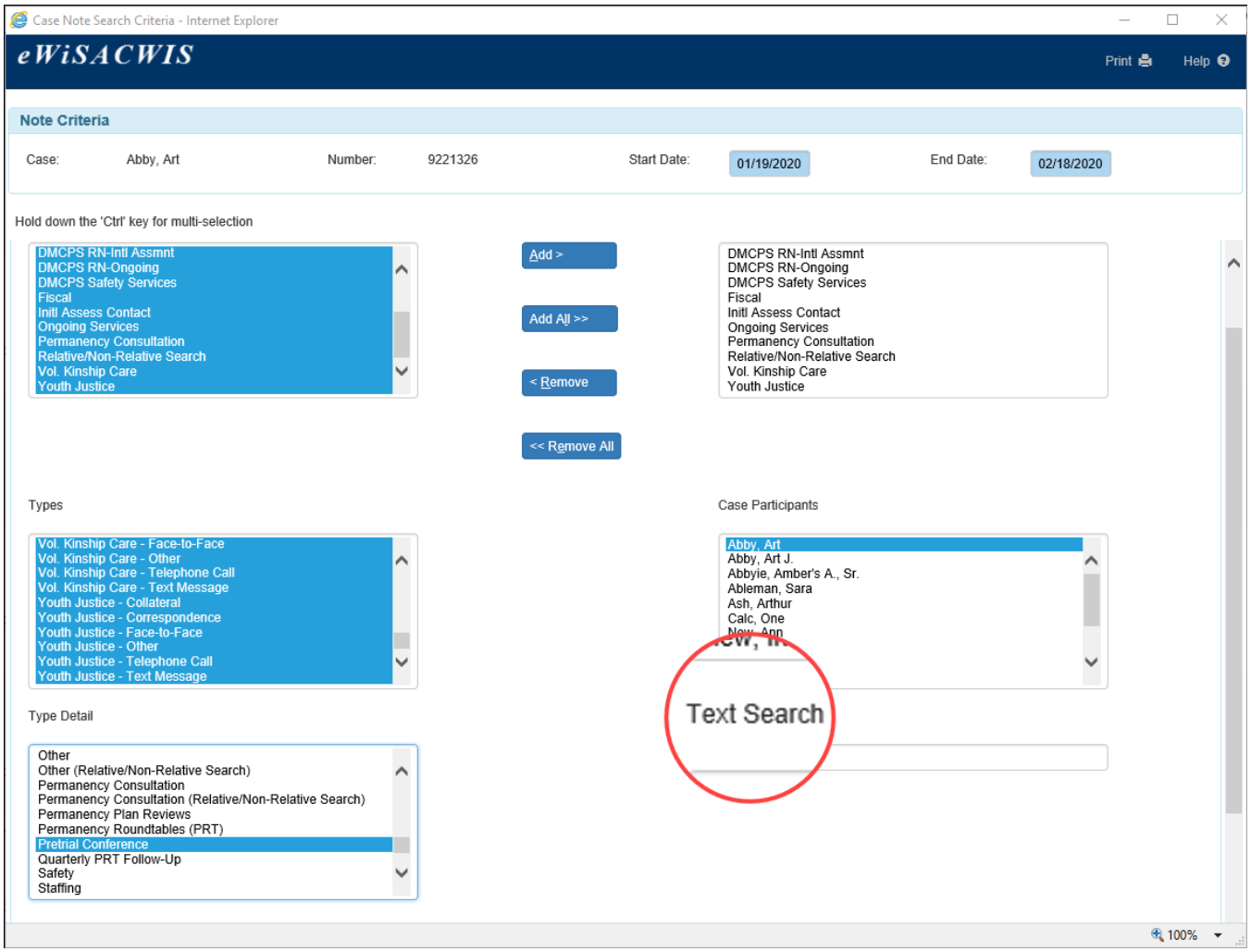
Viewing/ Printing Case Notes

1. To view or print multiple notes for a case at one time, click the Actions drop-down and select 'Case Note Criteria Search'.



2. Enter the criteria for the notes to be searched. Start Date and End Dates default 30 days prior to today's date and can be changed to expand or narrow the search. At least one

Category is required. Once all desired criteria are entered, click the Search button.



Note: A key word search can be used by typing a specific key word in the Text Search field, however common words (e.g. a, and, then, etc.) will return no records.

4. The Case Note Search Results page return all notes specified in the Case Note Search Criteria.

Case Note Search Results - Internet Explorer

eWiSACWIS

Print Help

Note Criteria

Case: Aardvark, Amy Number: 9222933 Start Date: 01/01/2000 End Date: 06/20/2018 Worker Name: All

Records 1 to 12

Notes

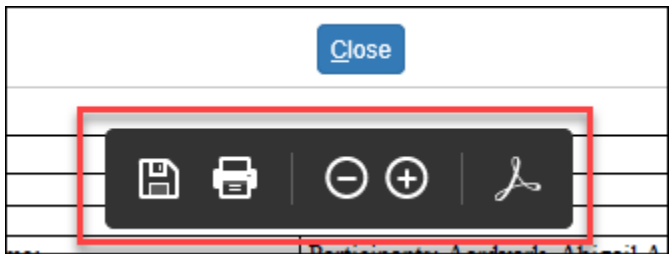
CNID	Date/Time Occurred	Date Entered	Category	Type	Worker Name	Billable		
9223710	12/02/2014 10:00 AM	03/13/2015	Initl Assess Contact	Initial Face-to-Face	Corn, Conn C	No	Print	View
9223990	02/02/2015 11:11 AM	10/09/2015	Ongoing Services	Face-to-Face	Corn, Conn C	No	Print	View
9223930	08/11/2015 10:00 AM	08/11/2015	Initl Assess Contact	Initial Face-to-Face	Corn, Conn C	No	Print	View
9224130	09/01/2015 10:00 AM	12/10/2015	BMCW Safety Services	Correspondence	Corn, Conn C	No	Print	View
9224053	11/07/2015	11/07/2015	Child Welfare	Correspondence	Corn, Conn C	No	Print	View

Print All Notes
Print All Notes (1 note per page)

New Search Close

100%

- Notes can be sorted by clicking on that blue column header; i.e. Date/Time Occurred, Date Entered, Category, Type, etc.
- To show notes only for a worker, select that worker from the Worker Name drop down.
- To Print or View a specific case note, select the appropriate hyperlink to the right of that note.
- To preview all the notes with the option to print, select Print All Notes from the Options drop down on the bottom of the page and Click Go.
- Notes will display in chronological order. To print, hover your mouse near the top of the screen to see the pop-up menu:



- Notes will print in a PDF document.

BIRT PDF Document - Internet Explorer

eWiSACWIS

Close

Case Name:	Aardvark, Amy	Case ID:	9222933

Date:	12/02/2014				Note 1 of 12
Begin Time:	10:00 AM	End Time:		Participants: Aardvark, Abigail A., III	
Duration:	0	Billable:	☐		
Category:	Initl Assess Contact	Type:	Initial Face-to-Face		
Face-to-Face Location: Court		Face-to-Face Result: Occurred		Type Detail:	
Worker Making Contact:		Corn, Conn C., Jr.		Contact by Designee:	☐
test					

Date:	02/02/2015				Note 2 of 12
Begin Time:	11:11 AM	End Time:		Participants: Aardvark, Adam A.	
Duration:	0	Billable:	☐		
Category:	Ongoing Services	Type:	Face-to-Face		
Face-to-Face Location: Home Visit		Face-to-Face Result: Occurred		Type Detail:	
Worker Making Contact:		Corn, Conn C., Jr.		Contact by Designee:	☐
x					

Date:	08/11/2015				Note 3 of 12
Begin Time:	10:00 AM	End Time:		Participants: Aardvark, Adam A.	
Duration:	0	Billable:	☐		
Category:	Initl Assess Contact	Type:	Initial Face-to-Face		
Face-to-Face Location: Court		Face-to-Face Result: Occurred		Type Detail:	
Worker Making Contact:		Corn, Conn C., Jr.		Contact by Designee:	☐
assfd					

Date:	09/01/2015				Note 4 of 12

Done 100%

Quick View of Case Notes from the Desktop

From the desktop (or from case search), expand the case, and then click to expand the Narratives icon. Hover the cursor over the word Details to see the first 120 characters of that case note. To view the entire note, click the note hyperlink. In each row, information about the note is displayed, including the date, participant(s), type, name of worker making contact, and note status.

Aardvark, Amy B. (9222933)

Case details:
CPS Family - Ongoing
BMCW-IA 2
Open OHP exists for associated participant(s)

Case address:
C/O: Ginger Rogers Care of Line
889 stapler gray
Madison, WI 53701
(888) 222-6666

Primary worker:
Corn, Conn C., Jr.
(608) 266-4496 Ext. 1222
Conn@wisconsin.gov

Actions:
Please select an action

View case information

Access Reports | Agreements and Notices | Assessments | Assets and Income
Assignments | Background Checks | Case/Permanency Plan | Child/Youth Images
Education | Eligibility | ICWA | Legal
Missing Child | Narratives | Participant Documents | Placements
Planning | Related People | Safety | Serious Incident Notification

Narratives

Ongoing S	(Details)	09/01/2017	Aardvarck, Alan; Aardvark, Abigail A., III; Aardvark, Amy B.	Face-to-Face	Corn, Conn C., Jr.	Pending
Ongoing S	(Details)	04/05/2016	Aardvarck, Alan; Aardvark, Abigail A., III; Aardvark, Adam A.; Aardvark, Amy B.; Johnson, Baby; Mae, Sally	Face-to-Face	Corn, Conn C., Jr.	Finalized
Ongoing Serv		04/01/2016	Aardvarck, Alan; Aardvark, Abigail A., III	Other	Corn, Conn C., Jr.	Pending
Ongoing Services		03/01/2016	Aardvark, Amy B.	Collateral	Corn, Conn C., Jr.	Pending
Ongoing Services	(Details)	12/28/2015	Aardvark, Adam A.	Correspondence	Corn, Conn C., Jr.	Pending
Ongoing Services	(Details)	12/28/2015	Aardvark, Abigail A., III; Aardvark, Adam A.	Face-to-Face	Corn, Conn C., Jr.	Pending
Adoption	(Details)	12/09/2015		Correspondence	Corn, Conn C., Jr.	Pending