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Overview

Partners can request to delete a case note from a customer's profile.

A case note can be requested to be deleted if one or more of the following has occurred:

- The case note was added to the wrong customer.
- The case note is a duplicate.
- The case note information is incorrect.
- The case note includes Personal Identifiable Information (PII).

After the request has been submitted a Grant Manager will review the request.

Requesting to delete a Case Note

A case note can be requested to be deleted from the left menu on most profile pages:

- Participant Summary Tools > Case Notes; or,
- Career Plan > any tab.

Participant Summary Tools	Overview Intake Review Progress Career Plan Worksite Placement Outcomes
Assessments	Overview 1. Review Assessment 2. Set Goals 3. Add Steps/Services Update Log
Case Notes	OVERVIEW CASE NOTES (18)
Resumes	Add Case Note Close
Services	General Delete 10/22/2023 Training
Worksites	Customer nas attended the weekly training. Save as case note without sending a message/email Seven Programs <i>10/22/2023 3:35:24 PM</i>
Uploads	
Uploads	

1. Click the **Delete** button next to the case note that should be removed.

† ask	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Employment Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Delete



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- 2. After clicking Delete, a drop-down list is provided with reasons for why the case note should be removed.
- DELETE CASE NOTE
 ×

 To submit a request to have a case note deleted, please complete the form below. The request will be sent to your state level program manager for review and approval.

 Case Note Deletion Reason *

 Select A Reason

 Case note added to the wrong customer

 Duplicate case note

 Includes Personal Identifiable Information (PII)

 Incorrect information in case note

 Other
- 3. Select the reason that applies and then click Submit Request.

DELETE CASE NOTE	×
To submit a request to have a case note deleted, p below. The request will be sent to your state level and approval.	please complete the form program manager for review
Case Note Deletion Reason *	
Incorrect information in case note	~
	Submit Request

- 4. The case note will now show Unsubmit as the status.
- 5. If the case note was deleted in error or you decided not to delete it, click the Unsubmit button.

Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Customer Attended 11/3 Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Unsubmit Requested Delete: Seven Programs on 11/03/2023



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Reviewing a Case Note Request

A Grant Manager will review requests using the Case Note Deletion Request Report from the Reports section.

- Select the Project/Category from the drop-down list and click Case Note Deletion Request Report.
- 2. Select the Project, Agency, and Status to filter the requests.

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III REPOR	TS					
Project/Category						
			~			
Case Note Deletion	Request Report					
Primary User: Progra	am Super Admin Users					
Purpose: Review cas	e note delete requests fo	r valid and acceptik	ole reasons.			

Project * Select Agency Select Status Select Filter Export

3. Click Manage to open and review the request.

Note Id	Last Name	First Name	Task	Subject	Entered By	Entered	Deletion Reason	Requested By	Agency	Status	\$
6121	Bundy	Al	Training	Customer Attended 11/3 Training	Seven Programs	11/03/2023 12:38 PM	Incorrect information in case note	Seven Programs	IYIP Asian Human Services	Not Reviewed	Manage

- Select the status from the drop-down list provided. Statuses include:
 - Not Reviewed
 - Approved
 - Rejected

MANAGE CASE NOTE DE	ETION REQUEST	
Status	Not Reviewed	~
CustomerName : Al Bundy	Select Not Reviewed	
ProjectName : DHS Youth Prog AgencyName : IYIP Asian Huma	Approved Rejected	



6. Click the Save button.

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5. If rejected is selected, a reason is required in the box provided.

Ct Reason Provide reason for rejection MANAGE CASE NOTE DELETION REQUEST Status Rejected Reject Reason More information is needed. CustomerName: Al Bundy More information is needed. ProjectName: Al Bundy DELETION REQUEST INFORMATION UserNameRequestedDelete: Seven Programs DELETION RequestedDelete: Seven Programs DeleteRequestedDelete: Seven Programs DELETION RequestedDelete: Seven Programs DeleteRequestedDelete: Seven Programs DELETION RequestedDelete: Seven Programs DeleteRequestedDelete: Seven Programs DELETION RequestedDelete: Seven Programs CASE NOTE INFORMATION DELeteRequestedDelete: Seven Programs Case note without, programs Seven Programs Station Training Training Training Training Training Training Training Training	us		Rejected	i				
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6121 Training 11/03/2023 Customer Customer Save as case Seven 11/03/20 Attended attended note without Programs 12:38 PM 11/3 the full sending message/email	Note Id	Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered
11/3/23.	6121	Training	11/03/2023	Customer Attended 11/3 Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/03/202 12:38 PM

7. The request will show the status selected. If you want to change or edit the request, click Manage.

Note Id	Last Name	First Name	Task	Subject	Entered By	Entered	Deletion Reason	Requested By	Agency	Status	1
6121	Bundy	Al	Training	Customer Attended 11/3 Training	Seven Programs	11/03/2023 12:38 PM	Incorrect information in case note	Seven Programs	IYIP Asian Human Services	Rejected	Manage

Case Note Status

After a request has been completed by a Program Manager, the status will show on the case note.

1. A case note that has been Approved will show a status of Deleted and the date.

Task	Contact Date	Subject	Comment	Delivery Method	$\frac{\Delta}{\nabla}$	Entered By	Entered
Deleted	Delete Requested on 11/07/2023 4:39 PM	N/A	Delete Reason: Duplicate case note	N/A		Delete Requested By: TPrograms	Deleted on: 11/07/2023 4:39 PM



2. A case note request that has been rejected, will go back to the original state and an email will be sent to the requester.

† Task	Contact Date	Subject	Comment [†]	Delivery Method	Entered By	Entered	Options
Training	11/3/2023	Employment Training	Customer attended the full training session on 11/3/23.	Save as case note without sending a message/email	Seven Programs	11/3/2023 12:38 PM	Delete

The email will provide details of why the request was rejected.

Reach out to the Grant Manager with any questions.

Rejected Case Note Deletion Request

