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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:

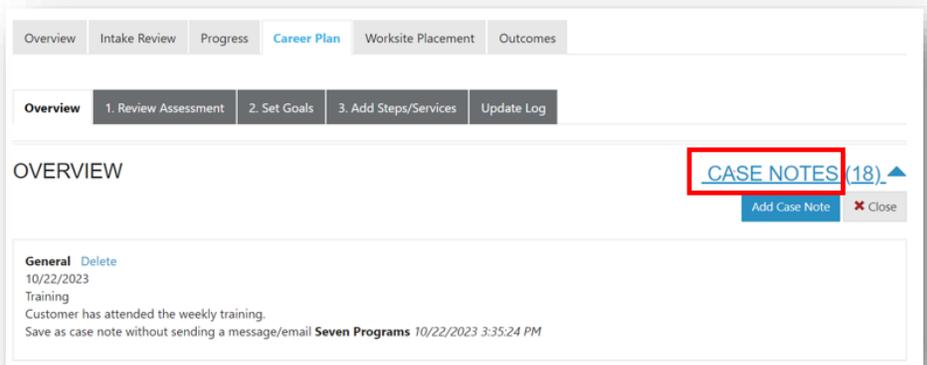
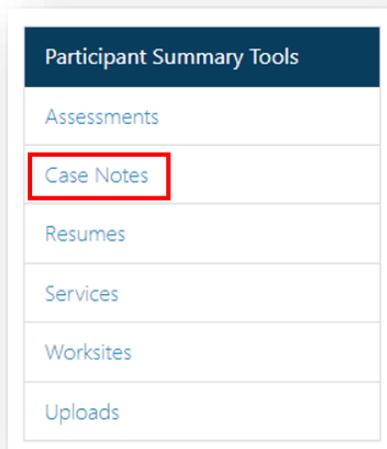
- The case note was added to the wrong customer.
- The case note is a duplicate.
- The case note information is incorrect.
- The case note includes Personal Identifiable Information (PII).

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.



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

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	<b>Delete</b>

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

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

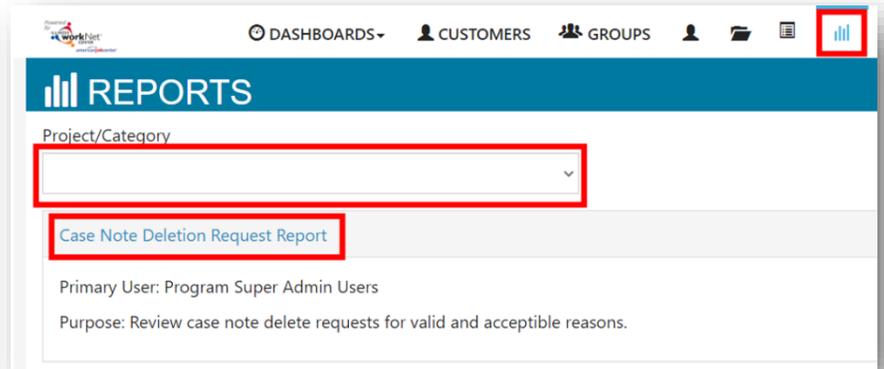
4. The case note will now show Unsubmit as the status.
5. If the case note was deleted in error or you decided not to delete it, click the Unsubmit button.

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	<b>Unsubmit</b> Requested Delete: Seven Programs on 11/03/2023

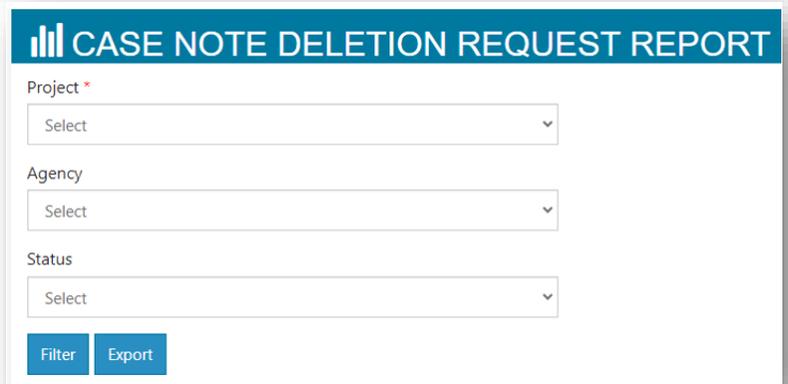
## Reviewing a Case Note Request

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

1. 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.



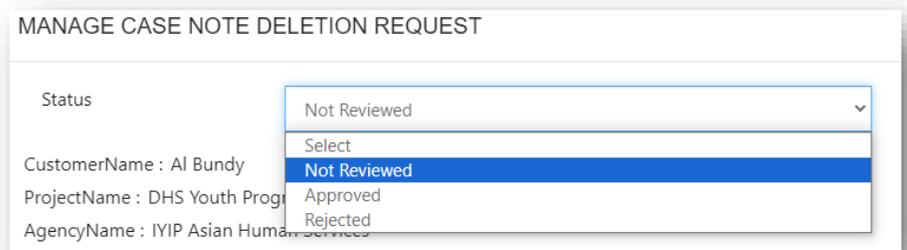
3. Click Manage to open and review the request.

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	<a href="#">Manage</a>

4. Select the status from the drop-down list provided.

Statuses include:

- Not Reviewed
- Approved
- Rejected



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

- Click the Save button.

UserNameRequestedDelete : Seven Programs
DeleteRequestedDate * : 11/03/2023
DeletionReason : Incorrect information in case note

Note Id	Task	Contact Date	Subject	Comment	Delivery Method	Entered By	Entered
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	11/03/2023 12:38 PM

- 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	Manage
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.

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

Task	Contact Date	Subject	Comment	Delivery Method	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.

