

IWDS 2.0 | Case Note – Manual Entry Form

Blackout period: June 22 – July 1, 2026 | Enter into IWDS 2.0 upon restoration | Retain per LWIA records policy

BLACKOUT PERIOD

SECTION 1 – PARTICIPANT INFORMATION

Participant Name *	Date of Contact *	Staff Name *	Confidential? Yes No
LWIA / One-Stop Center	Program		

SECTION 2 – CASE NOTE CATEGORY (SELECT ONE *)

Customer Contact	Training Progress
Customer Outcomes Information	Transition from Active Services (WIOA Exit)
File Maintenance	

SECTION 3 – SUB-CATEGORY & SUBJECT

Sub-Category	Subject *
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SECTION 4 – CASE NOTE TEXT * (2000 CHARACTER MAX)

Remaining characters: / 2000

SECTION 5 – ACTIONS & FOLLOW-UP

Next Steps / Action Items

Follow-Up Date	Referred To	Referral Date
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SECTION 6 – POST-BLACKOUT ENTRY INSTRUCTIONS (AFTER JULY 1, 2026) | SEE PAGE 2 FOR FULL DETAILS

IMPORTANT: You MUST change the Contact Date in IWDS 2.0 to the original date on this form — do NOT use today's date.

- 1 Log in to IWDS 2.0 → Customers → search participant → open profile.
- 2 Participant Summary Tools (left panel) → Case Notes → + Add Case Note.
- 3 Contact Date: clear auto-filled date and enter the date from Section 1.
- 4 Category / Sub-Category: match selections from Sections 2 & 3.
- 5 Subject, Program, Confidential: enter from Sections 1 & 3.
- 6 Case Note text: type or paste from Section 4 (2000 character max).
- 7 Click Save → check confirmation box below → file this form.

SECTION 7 – STAFF CERTIFICATION

I certify that the information on this form is accurate and complete, and will be entered into IWDS 2.0 upon system restoration.

Staff Signature	Date Signed	Supervisor Review (if req.)

Confirmed: Note entered into IWDS 2.0 on: _____

IWDS 2.0 | Post-Blackout Case Note Entry — Detailed Instructions

Complete these steps after July 1, 2026, when IWDS 2.0 is restored. Enter one case note per paper form completed. **POST-BLACKOUT ENTRY**

■ CRITICAL REMINDER: The system auto-fills today's date. You **MUST** manually change the Contact Date to the original contact date recorded in Section 1 of the paper form. Using the wrong date affects program reporting and participant records.

Step 1 — Log In & Locate the Participant

- 1a. Open IWDS 2.0 and sign in with your credentials.
- 1b. Click Customers in the top navigation bar.
- 1c. Search for the participant by name. Click their name to open the Customer Profile.

Step 2 — Navigate to Case Notes & Open the Add Form

- 2a. In the Participant Summary Tools panel on the left side of the screen, click Case Notes.
- 2b. Click the + Add Case Note button in the upper-right corner of the Case Notes section.
- 2c. The Add Case Note modal window will open.

Step 3 — Set the Contact Date ■ Do NOT skip this step

- 3a. Locate the Contact Date field in the modal. It will be pre-filled with today's date.
- 3b. Clear the field and type the date from Section 1 of the paper form (the actual date of contact).
- 3c. Double-check the date before proceeding. This date cannot be easily corrected after saving.

Step 4 — Select Category & Sub-Category

- 4a. Click the Category dropdown and select the category checked in Section 2 of this form.
- 4b. Once a category is chosen, the Sub-Category dropdown becomes active.
- 4c. Select the sub-category noted in Section 3, or the closest available match.

Step 5 — Enter Subject, Program & Confidential

- 5a. Subject: Type the subject recorded in Section 3 of this form.
- 5b. Program: Select the program from the dropdown that matches Section 1.
- 5c. Confidential: Set to Yes or No as marked in Section 1.

Step 6 — Enter the Case Note Text

- 6a. Click in the Case Note text area and type or paste the narrative from Section 4.
- 6b. IWDS 2.0 allows up to 2000 characters. The remaining character count displays at the bottom of the field.
- 6c. If the note exceeds 1000 characters, save the first entry, then open a second Add Case Note with the same contact date and add '(continued)' at the start of the Subject line.

Step 7 — Save & Confirm

- 7a. Click the Save button. The modal closes and the new case note appears in the list.
- 7b. Return to the paper form and check the confirmation checkbox in Section 7.
- 7c. Write today's date next to the checkbox to record when the entry was made.
- 7d. File the completed paper form per your LWIA's records retention policy.