**FACTS ABOUT NOTES IN MOBIUS**

- Notes are used to provide additional details about the data entered into the various pages.
- Notes are entered in the Notes section closest to where the data is entered.
- Each note has a Subject. Notes can be sorted by these Subjects.
- Subjects should reflect the content of the Note.
- Notes can be edited, but cannot be deleted.
- Edited notes will retain the original text; the original text cannot be overwritten.

**Person Home Page:** Notes related to the demographic information collected on the page.

**Examples of the types of Information captured**
- Address verification – attempts made to verify address
- Bank Account information – changes and issues
- Substantiation of Consent to Disclose information (CDS)

**Suggested Subject Heading**
- Address Verification
- Bank Account
- Consent to Disclose

**Integrated Case Home Page:** Notes related to changes in the household circumstances.

**Examples of the types of information captured**
- ETW/BFE Eligibility Determination Summary
- Monthly processing of ETW/BFE benefits
- Addition or removal of household members
- Changes in living arrangements
- Child Support Services information
- Investigation and Review and Program Compliance information
- Learner Application or CIC processing clarification
- Substantiation of documentation received
- Emergency requests including Director Approvals
- Appeal activities

**Suggested Subject Heading**
- IS Eligibility Decision
- Appeals
- Investigation and Review
- Child Support Services
- Income and Assets
- Shelter
- Medical
- Director Approval Request
- Health Benefits
- Emergency Request
- Supplemental Benefits
- Additional Assessment Information

**Service Plan Home Page:** Information related to the activities and services outlined in the Service Plan

**Examples of the types of information captured**
- Individual's progress in completing a listed activity
- Concerns regarding attendance and performance
- Details related to Follow Up activities and outcomes
- Rationale for approvals (i.e. program extensions)
- Rationale for cancellation or modification of Plan Items
- Documentation of withdrawals, cancellations and no shows for training interventions
- Completion details

**Suggested Subject Headings**
- Follow Up
- Progress Review
- Attendance/Performance
- Withdrawal/No Show/Cancellation
- DRES
- Plan Item Approval
Plan Item Notes:
- Additional instructions to participants attached to a particular Plan Item that print on the Service Agreement.
- Can include address of the service, courses in a session, appointment times, or other information required by the participant that is not part of the Plan Item Details.

Service Needs Determination Notes is a summary of the Service Needs Determination Assessment (SND).
- Description of presenting circumstances for the individual.
- Identification of the individual’s need for career, training, employment, financial or non-financial support, or information.
- Identification of a need for further assessment (Employability Assessment).
- Identification of additional activities that may be required.
- See Service Needs Determination Policy for additional details.

Employability Assessment Notes provide additional details for each of the Assessment Factor groupings.
- Additional details related to the strengths and challenges identified in the Assessment Factors.
- Details relating to the individual’s disability and supports required (if applicable).
- Summary providing rationale for proceeding with the activities identified in the Service Plan.
- Information substantiating the Ready, Willing and Able criteria.
- See Employability Assessment Policy for additional details.
- For information about the content of the Assessment Factors groupings, see the Assessment Factors Handbook.

Product Delivery Case Notes are Notes pertaining to changes that impact Learner funding.

**Examples of the types of information captured**
- Changes in evidence
- Late applications
- Exceptional occurrences
- Stop payment and cheque regeneration
- Notes regarding payment issues and investigation

**Suggested Subject Headings**
- Change in Evidence
- Exceptional Occurrence
- Stop Payment/Regeneration
- Payment Issue

Employer Home Page Notes capture interactions between CEC and employers receiving a service from Human Services.

**Examples of the types of information captured**
- Identified needs of the employer
- Planned activities
- Employer Connections events and outcomes
- Workforce Adjustment activities

**Suggested Subject Headings**
- Workforce Adjustment
- Employer Connections