16 add Case Note

Attaching case notes – This is a particulalrly useful tool when you need to:

1. Add information to case

2. Update a case;

3. Add a document to a case

Should be used when you you are making ad-hoc updates to cases. These are public notes accessible to everyone that has access to the case. (Please use professional language at all times)

On the Case Summary Page, Click Case Notes to see what case notes have been added.

Similarly, hover over Case Coordination and Case notes. Click Case Notes to see what case notes have been added.

My Messages	My cases	Check for case	My settings	My reports	Administration	Help

Case: 3076 - Adam Test ⚙ | **Case Coordinator:** PRAC (Test) PRAC | **Status:** Assessment

In this section:
- Case Summary
- Create Message
- Case Items ▶
- Case Alert Settings
- Case Coordination ▶
- Case Administration ▶

My Cases > Case Summary > Case Notes

Case Notes ❓

Create a case note

🔧 Search Filters

Date ▼	Time	Category	Description	Date Created	Author

Click on 'Create a case note'

In this section:
- Case Summary
- Create Message
- Case Items ▶
- Case Alert Settings
- Case Coordination ▶
- Case Administration ▶
- View case snapshot
- Audit case events

My Cases > Case Summary > Create Case Note

Create Case Note

Case Note Date (dd/mm/yyyy) *	[_____] 12
Case Note Time (hh:mm)	00 ∨ 00 ∨
Family Member(s)	👥 No Family Members Selected
Case Note Category *	Please Select ∨
Case Note Description *	[_____]
Upload Document	[_____] Browse...
Document Type	Please Select ∨

Save

Fill in the details on this page. An * depicts a mandatory field.

Select the relevant option from the drop down list.

Documents can be attached but it is optional.

QES

Logged in as Shanur Miah   Log out   Version: V4.2.5
Environment: Live

| My Messages | My cases | Check for case | My settings | My reports | Administration | Help |

Case: 3076 - Adam Test ⚙   **Case Coordinator:** PRAC (Test) PRAC   **Status:** Assessment

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My Cases > Case Summary > Create Case Note

Create Case Note   ❓

Case Note Date (dd/mm/yyyy) *   06/03/2020   [12]

Case Note Time (hh:mm)   10 ▾   29 ▾

Family Member(s)   👥👥   mary test

Case Note Category *   Case Update ▾

Case Note Description *   Case will be closed as Dormant - No Further Actions are required in case as family has disengaged
B
☰
U
ABC ✓

Upload Document   \\thpnas01\mydocuments\Shar   Browse...

Document Type   PDF ▾

Save

Click on 'Save'

QES

Environment: Live

| My Messages | My cases | Check for case | My settings | My reports | Administration | Help |

Case: 3076 - Adam Test ⚙ | **Case Coordinator:** PRAC (Test) PRAC | **Status:** Assessment

In this section:

Case Summary
Create Message
Case Items ▶
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Case Coordination ▶
Case Administration ▶
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My Cases > Case Summary > Case Notes

Case Notes ❓

Create a case note

⚙ Search Filters

Date ▼	Time	Category	Description	Date Created	Author	
☐ 06/03/2020	10:29	Case Update	Case will be closed as Dormant - No Further Actions are required in case as family has disengaged	06/03/2020 10:40:09	Shanur Miah	⚙
☐ 26/04/2019	00:00	Telephone Call	EHH referral	26/04/2019 15:49:42	Rebecca Thacker	⚙

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You will now see your case note added to the case.

QⴹS