

16 add Case Note

Attaching case notes – This is a particularly 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)

The screenshot shows the eEHA system interface. At the top, there is a logo for 'Holistix' and 'Welcome to the eEHA system'. Below this, there is a navigation bar with 'My Messages', 'My cases', 'Check for case', 'Panel Meetings', 'My settings', 'My reports', 'Administration', and 'Help'. The 'My cases' button is highlighted. Below the navigation bar, there is a header for the case: 'Case: 3076 - Adam Test', 'Case Coordinator: PRAC (Test) PRAC', and 'Status: Delivery'. The main content area is titled 'Case Summary' and contains a 'Case Notes' button, which is highlighted with a red arrow. Below the 'Case Notes' button, there are sections for 'Children' and 'Adults'. The 'Children' section lists three children: Ann Adam Test (Female, 01/10/2013, Age: 6), Athena Test (Female, 05/12/2007, Age: 12), and mary test (Female, 05/05/2005, Age: 15). The 'Adults' section lists one adult: mandy mando (Female).

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

EHA User Guide – Practitioner Manual

The screenshot shows the EHA web application interface. At the top, it says "Logged in as Shanur Miah". Below this is a navigation bar with "My Messages", "My cases" (highlighted with a blue bubble), "Check for case", and "My settings". The main header displays "Case: 3076 - Adam Test" and "Case Coordinator: PRAC (Test) PRA".

On the left, under "In this section:", there is a sidebar menu with items like "Case Summary", "Create Message", "Case Items", "Case Alert Settings", "Case Coordination" (highlighted), "Case Administration", "View case snapshot", and "Audit case events".

The main content area shows "My Cases > Case Summary" and "Case Summary". A "Case Notes" button is visible. A dropdown menu is open under "Case Coordination", listing various actions such as "Set Lead Professionals", "Change Case Coordinator", "Reassessment", "Create Delivery Plan Review", "Create consent statement", "Create supporting stronger families form", "Case documents", "Add child to case", "Add adult to case", "Close case member", "Close case", and "Case Notes". A red arrow points to the "Case Notes" option in this menu.

At the bottom, there is a user profile for "Ann Adam Test".

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

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

My Cases > Case Summary > Case Notes

Case Notes

Search Filters

Date	Time	Category	Description	Date Created	Author
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Create a case note

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) *

Case Note Time (hh:mm)

Family Member(s) No Family Members Selected

Case Note Category *

Case Note Description *

Upload Document

Document Type

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.

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) *	<input type="text" value="06/03/2020"/> <input type="text" value="12"/>
Case Note Time (hh:mm)	<input type="text" value="10"/> <input type="text" value="29"/>
Family Member(s)	 mary test
Case Note Category *	<input type="text" value="Case Update"/>
Case Note Description *	<div style="border: 1px solid #ccc; padding: 5px;"><p>Case will be closed as Dormant - No Further Actions are required in case as family has disengaged</p></div> <div style="float: right; border: 1px solid #ccc; padding: 2px;">B U ABC</div>
Upload Document	<input type="text" value="\\thpnas01\mydocuments\Shar"/> <input type="button" value="Browse..."/>
Document Type	<input type="text" value="PDF"/>

Click on 'Save'

- 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
- View case snapshot
- Audit case events

My Cases > Case Summary > Case Notes

Case Notes



Create a case note

Search Filters

	Date	Time	Category	Description	Date Created	Author	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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.