

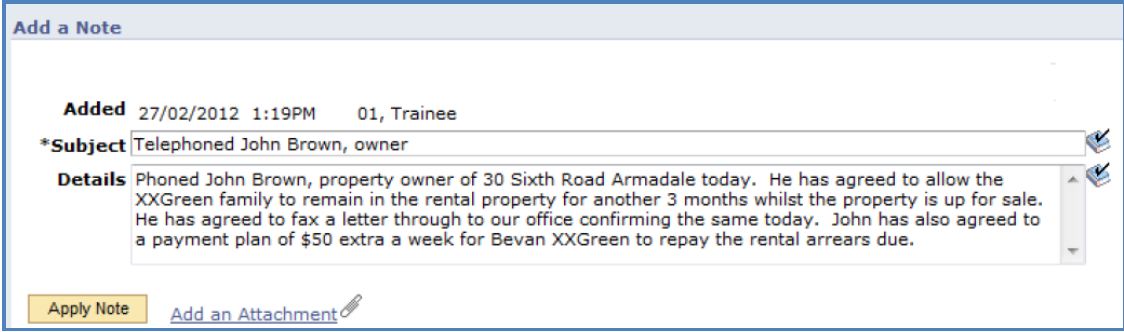
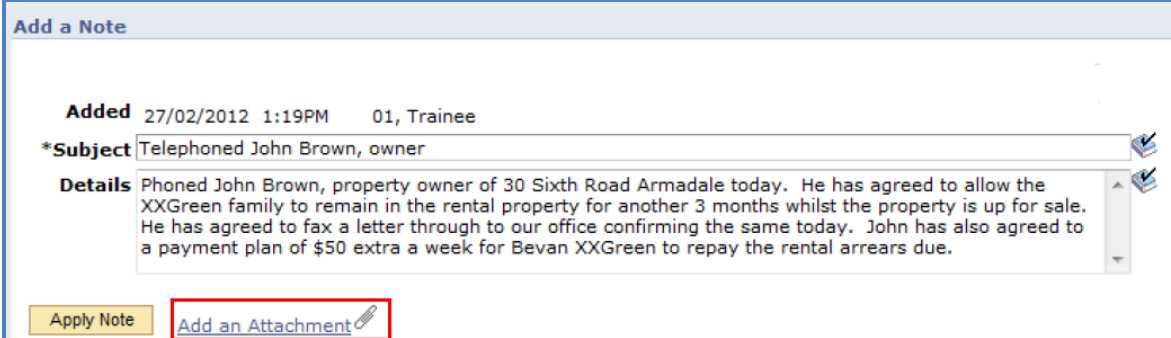
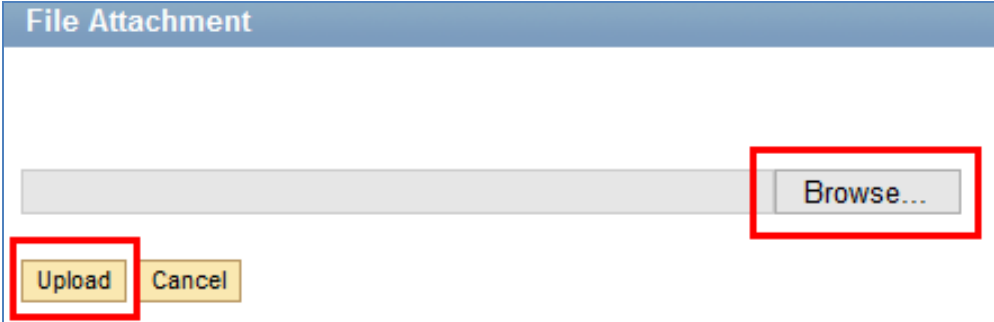


FuSioN User Guide

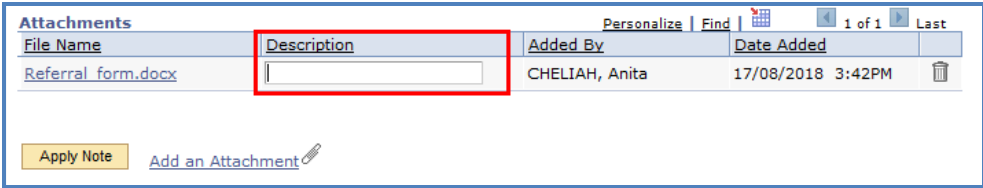
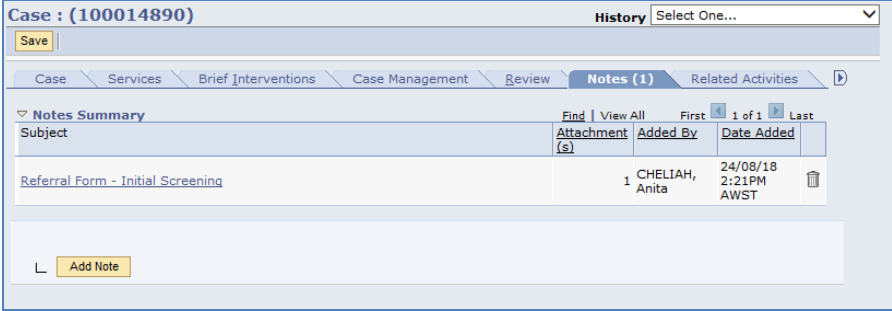
Notes and Documents – Assessment and Coordination cases

Overview	This User Guide details how to record notes and documents in an Assessment and Coordination case.
Hints & Tips	Notes and documents can be recorded in either the case or the case's service screen.

Notes and Documents – Assessment and Coordination cases

Step	Action
1.	<p>In the Assessment and Coordination case, click on the Notes tab</p> <ul style="list-style-type: none">• Enter Subject• Enter Details  <p>The screenshot shows a form titled "Add a Note". It includes a timestamp "Added 27/02/2012 1:19PM" and a user "01, Trainee". The subject field contains "Telephoned John Brown, owner". The details field contains a paragraph of text: "Phoned John Brown, property owner of 30 Sixth Road Armadale today. He has agreed to allow the XXGreen family to remain in the rental property for another 3 months whilst the property is up for sale. He has agreed to fax a letter through to our office confirming the same today. John has also agreed to a payment plan of \$50 extra a week for Bevan XXGreen to repay the rental arrears due." At the bottom, there are buttons for "Apply Note" and "Add an Attachment".</p>
3.	<p>To add an Attachment to a note: Click on Add an Attachment link.</p>  <p>This screenshot is identical to the one in step 1, but the "Add an Attachment" link at the bottom of the form is highlighted with a red rectangular box.</p>
4.	<p>Click on Browse and select a document from your PC and click Upload.</p>  <p>The screenshot shows a "File Attachment" dialog box. It features a large grey text input field. To the right of this field is a button labeled "Browse...". Below the input field are two buttons: "Upload" and "Cancel". Both the "Browse..." button and the "Upload" button are highlighted with red rectangular boxes.</p>

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Step	Action
5.	<p>Description is a free text field – record an appropriate description of the attachment that’s been uploaded to the note.</p> 
6.	<p>Click Apply Note ; The note now displays in Notes Summary.</p> 
7.	<p>To view or edit the note, click on the note’s hyperlink in Subject. Details of the note will display below the Notes Summary.</p> 