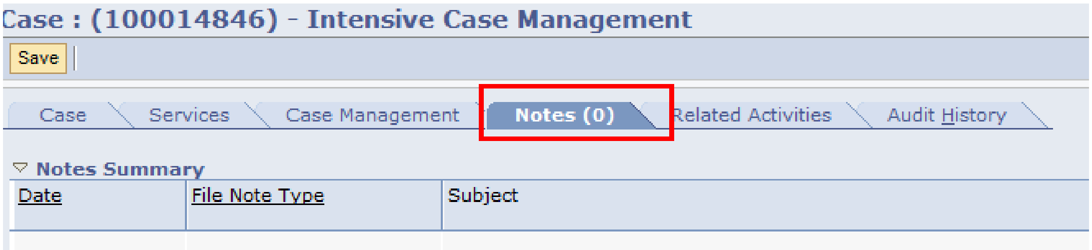
FuSioN User Guide

Notes and Documents – Intensive Case Management cases

Overview	This User Guide details how to record notes and documents in an Intensive Case Management case.
Hints & Tips	Notes and documents can be recorded in either the case or service screen.

Notes and Documents – Intensive Case Management cases

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>
In the Intensive Case Management case, navigate to the Notes tab.

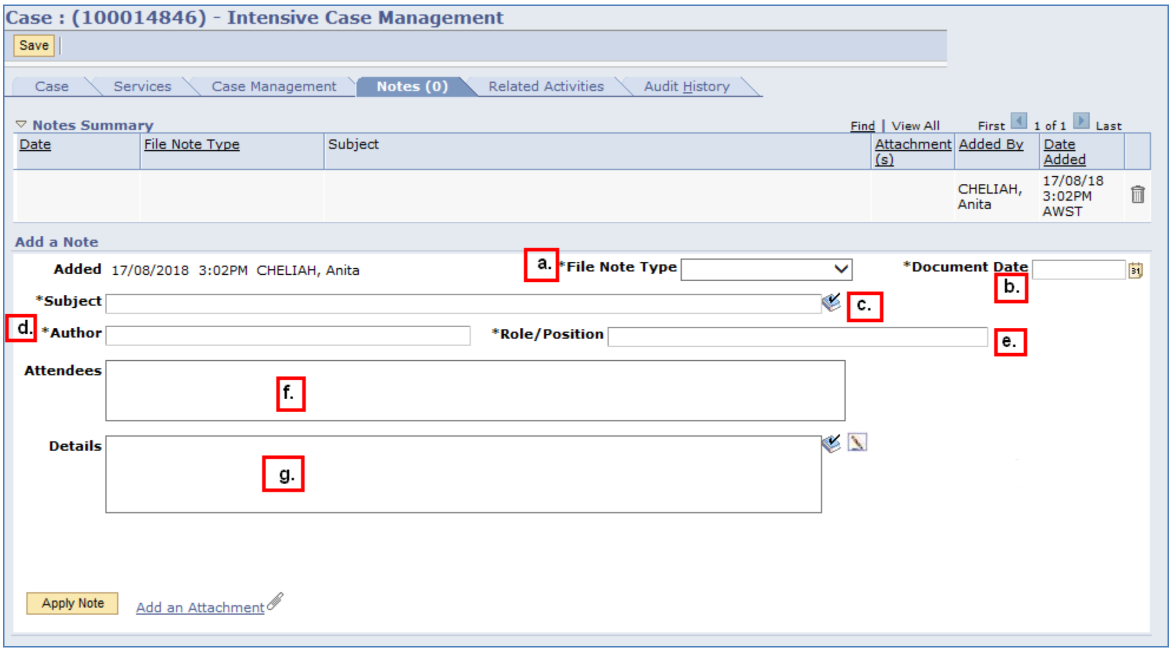


</td></tr>
<tr><td>2.</td><td>
Complete the following:

a. Select **File Note Type** from the drop down list.

b. Record the **Document Date**

c. to g. The **Subject**, **Author**, **Role/Position**, **Attendees**, and **Details** fields are free text fields – complete as required.



Note: **File Note**, **Document Date**, **Subject**, **Author**, and **Role/Position** fields are mandatory and must be completed for the Note to be saved to the case.
</td></tr>
</table>

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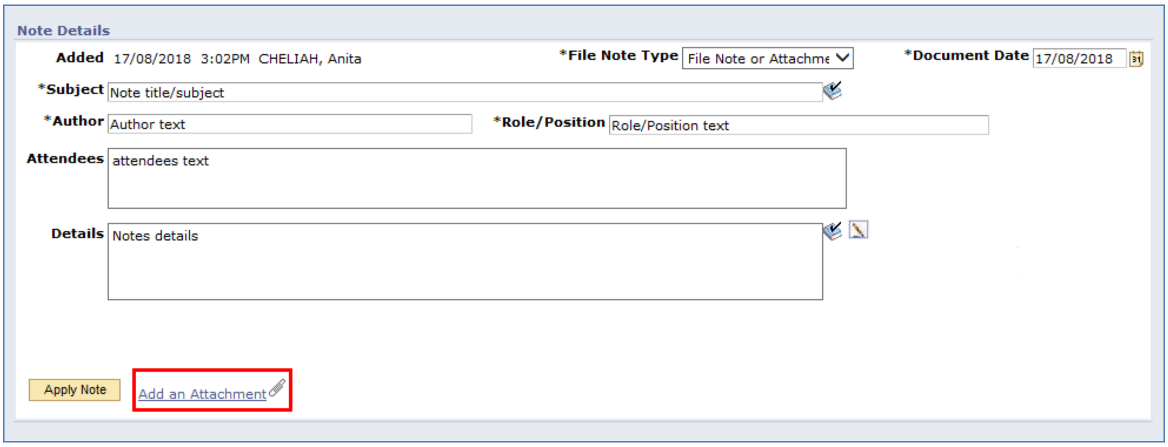
<tr><td>3.</td><td>

To add an Attachment to a note: Click on **Add an Attachment** link.



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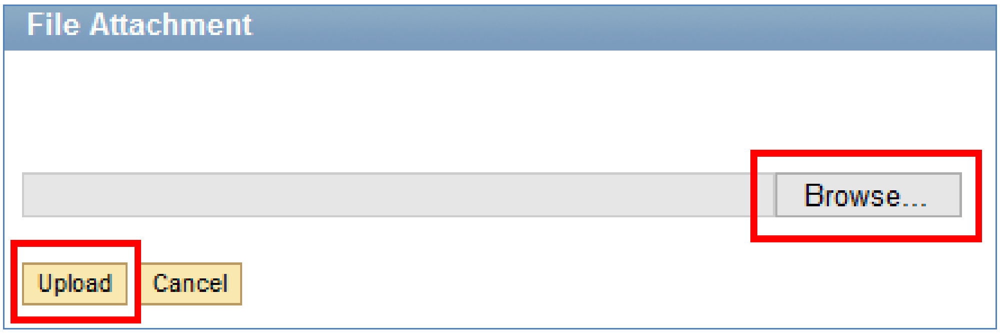
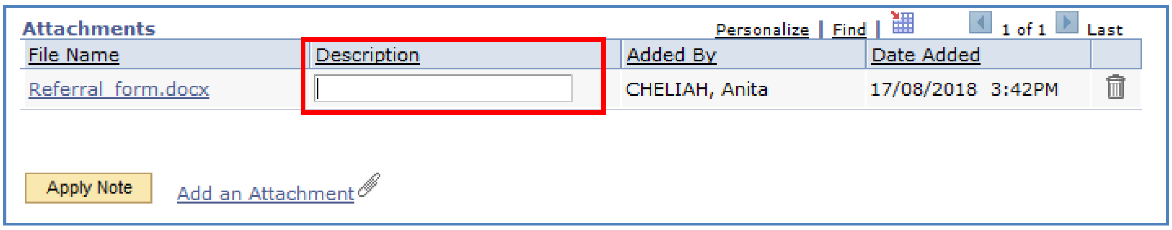
<tr><td>4.</td><td>

Click on **Browse** and select a document from your PC and click **Upload**.



</td></tr>
<tr><td>5.</td><td>

Description is a free text field – record an appropriate description of the attachment that's been uploaded to the note.



</td></tr>
</table>

<table>
<tr><th colspan="2">Notes and Documents – Intensive Case Management cases</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6.</td><td>

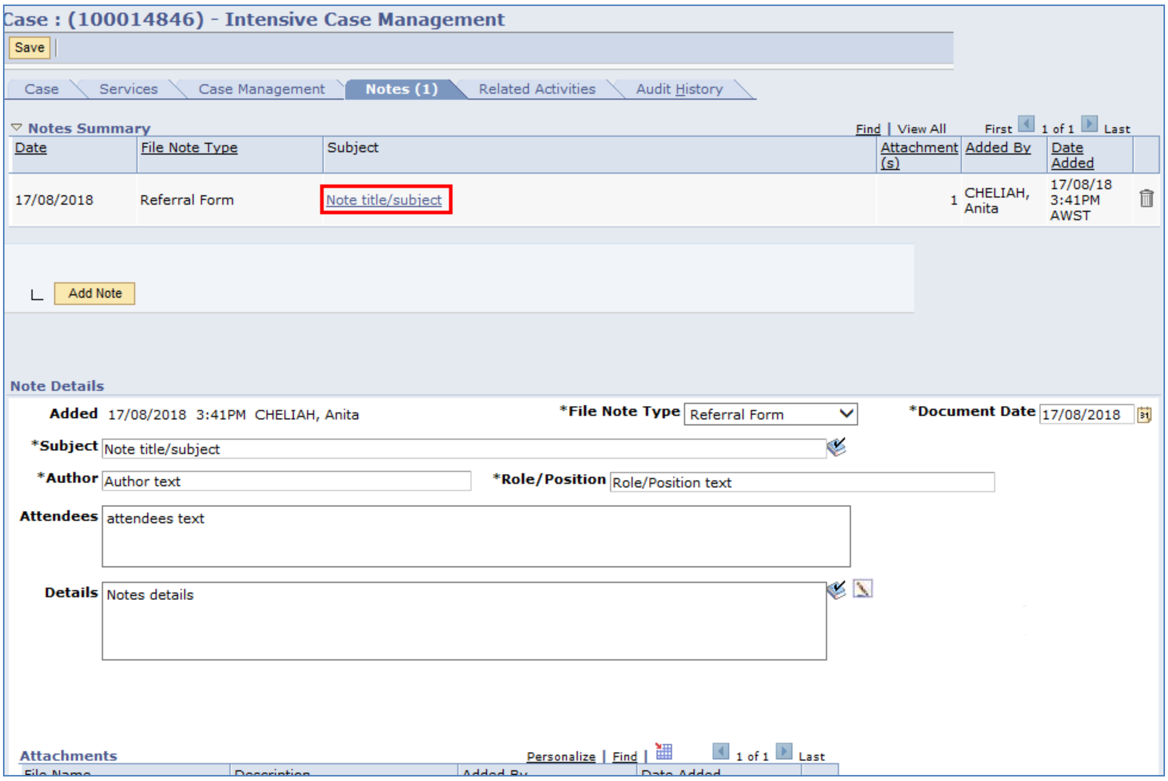
Click **Apply Note**

The note now displays in Notes Summary.

</td></tr>
<tr><td>7.</td><td>

To view or edit the note, click on the note's hyperlink in **Subject**.

Details of the note will display below the Notes Summary.



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