

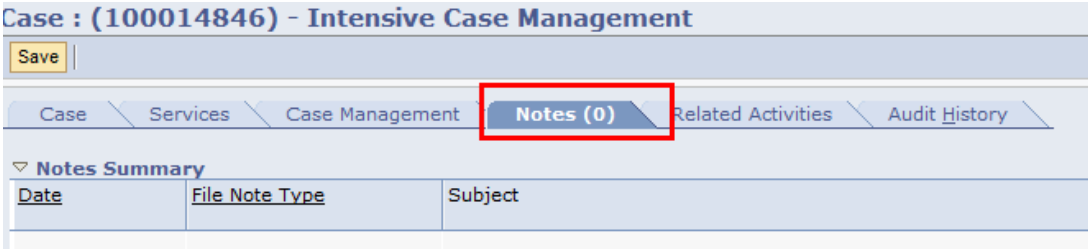
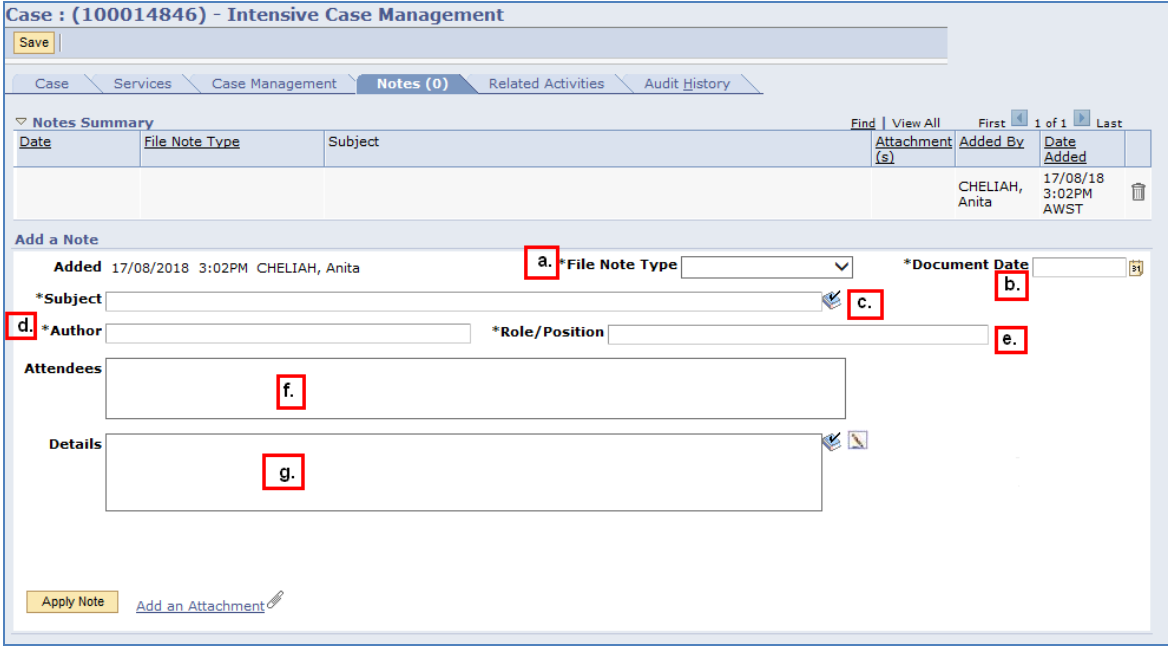


FuSioN User Guide

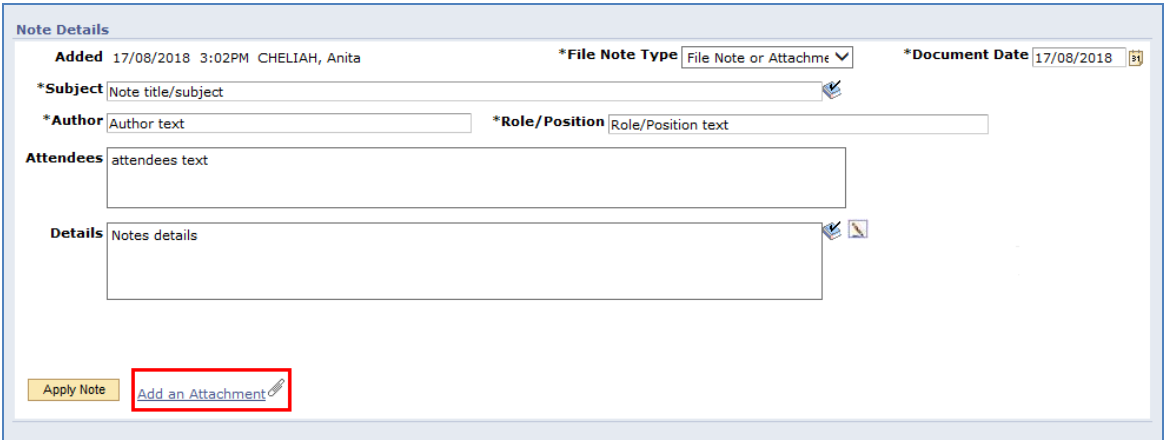
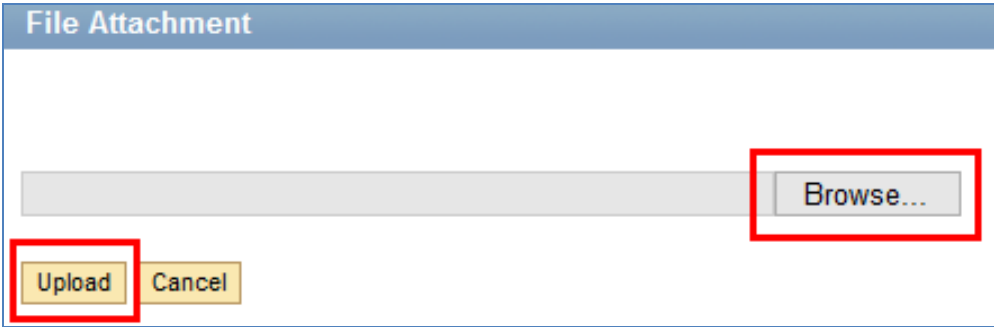
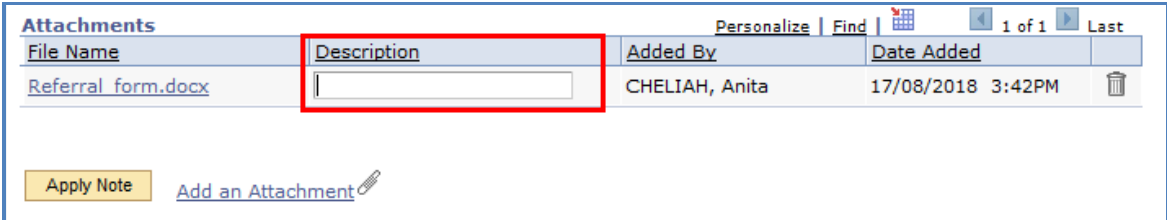
Notes and Documents – Intensive Case Management cases

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

Step	Action
1.	<p>In the Intensive Case Management case, navigate to the Notes tab.</p>  <p>The screenshot shows the 'Case : (100014846) - Intensive Case Management' header with a 'Save' button. Below is a breadcrumb trail: Case / Services / Case Management / Notes (0) / Related Activities / Audit History. A 'Notes Summary' table is visible with columns for Date, File Note Type, and Subject.</p>
2.	<p>Complete the following:</p> <ol style="list-style-type: none"> Select File Note Type from the drop down list. Record the Document Date to g. The Subject, Author, Role/Position, Attendees, and Details fields are free text fields – complete as required.  <p>The screenshot shows the 'Add a Note' form. Fields are labeled as follows: 'a.' for the File Note Type dropdown, 'b.' for the Document Date field, 'c.' for the Subject field, 'd.' for the Author field, 'e.' for the Role/Position field, 'f.' for the Attendees field, and 'g.' for the Details field. The form also shows a table with columns for Date, File Note Type, Subject, Attachment(s), Added By, and Date Added. A 'Save' button is at the top left, and 'Apply Note' and 'Add an Attachment' buttons are at the bottom.</p> <p>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.</p>

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Step	Action
3.	<p>To add an Attachment to a note: Click on Add an Attachment link.</p>  <p>The screenshot shows the 'Note Details' form with fields for *Subject, *Author, *Role/Position, Attendees, and Details. At the bottom, there is an 'Apply Note' button and a link 'Add an Attachment' with a pencil icon, which is highlighted with a red box.</p>
4.	<p>Click on Browse and select a document from your PC and click Upload.</p>  <p>The screenshot shows the 'File Attachment' dialog box. It has a large empty text area, a 'Browse...' button on the right, and 'Upload' and 'Cancel' buttons at the bottom. Both the 'Browse...' button and the 'Upload' button are highlighted with red boxes.</p>
5.	<p>Description is a free text field – record an appropriate description of the attachment that's been uploaded to the note.</p>  <p>The screenshot shows the 'Attachments' table with columns: File Name, Description, Added By, Date Added, and a trash icon. The first row contains 'Referral form.docx', 'CHELIAH, Anita', and '17/08/2018 3:42PM'. The 'Description' column for this row is highlighted with a red box.</p>

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Step	Action
6.	<p>Click Apply Note</p> <p>The note now displays in Notes Summary.</p> 
7.	<p>To view or edit the note, click on the note's hyperlink in Subject.</p> <p>Details of the note will display below the Notes Summary.</p> 