



# Assessment and Coordination – Notes and Documents

## 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.

### 1. ADDING A NOTE:

Navigate to the Assessment and Coordination Case.

Click on the **Notes** tab.

Note: If there is already notes present, click on the **Add Note** button.

Enter in the **Subject** and **Details**

Case Services Brief Interventions Case Management Review Outcomes **Notes (0)** Related Activities Audit History

**Notes Summary**

There are No Notes and Attachments for this Activity ID

**Add a Note**

Added 16/08/2020 9:42AM HILL, Melanie

\*Subject Telephone John Brown, owner

Details Phone John Brown property owner of 100 Milligan Street today. He has agreed to allow the Smith 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 Bob Smith to repay the rental arrears due.

Apply Note Add an Attachment



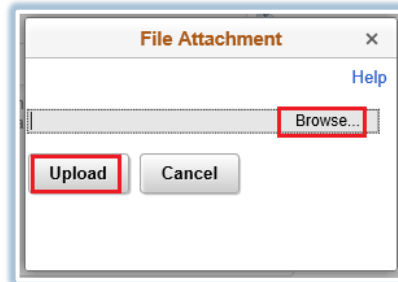
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## 2. ADDING AN ATTACHMENT:

Click on **Add an Attachment** link.



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



## 3. ENTERING IN DETAILS OF ATTACHMENT:

After returning to the Notes tab with the attachment added, enter in a **Description**.

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

**Add a Note**

Added 16/08/2020 9:42AM HILL, Melanie

\*Subject Telephone John Brown, owner

Details Phone John Brown property owner of 100 Milligan Street today. He has agreed to allow the Smith 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 Bob Smith to repay the rental arrears due.

**Attachments**

File Name	Description	Added By	Date Added
<a href="#">John Brown Fax.doc</a>	Fax received from John re x	HILL, Melanie	16/08/2020 9:42AM

Apply Note Add an Attachment



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## 4. SAVING THE NOTE:

Click **Apply Note** button

The note now displays in Notes Summary.

The screenshot shows a navigation bar with tabs: Case, Services, Brief Interventions, Case Management, Review, Outcomes, **Notes (1)**, Related Activities, and Audit History. Below the navigation bar is a section titled "Notes Summary" with a search icon and a "1-1 of 1" dropdown. A table displays the following data:

Subject	Attachment(s)	Added By	Date Added
<a href="#">Telephone John Brown, owner</a>	1	HILL, Melanie	16/08/2020 9:42AM AWST

Below the table is an "Add Note" button.

## 5. VIEWING AND EDITING NOTES:

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

Details of the note will display below the Notes Summary.

The screenshot shows the "Note Details" view. The navigation bar is the same as in the previous screenshot. The "Notes Summary" section is collapsed, and the "Note Details" section is expanded. The "Subject" field is highlighted with a red box and contains the text "Telephone John Brown, owner". Below this is an "Add Note" button. The "Note Details" section shows the following information:

**Note Details**

Added: 16/08/2020 9:42AM HILL, Melanie

\*Subject: Telephone John Brown, owner

Details: Phone John Brown property owner of 100 Milligan Street today. He has agreed to allow the Smith 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 Bob Smith to repay the rental arrears due.

**Attachments**


File Name	Description	Added By	Date Added
<a href="#">John_Brown_Fax.doc</a>	Fax received from John re di	HILL, Melanie	16/08/2020 9:42AM

At the bottom of the "Attachments" section are "Apply Note" and "Add an Attachment" buttons.



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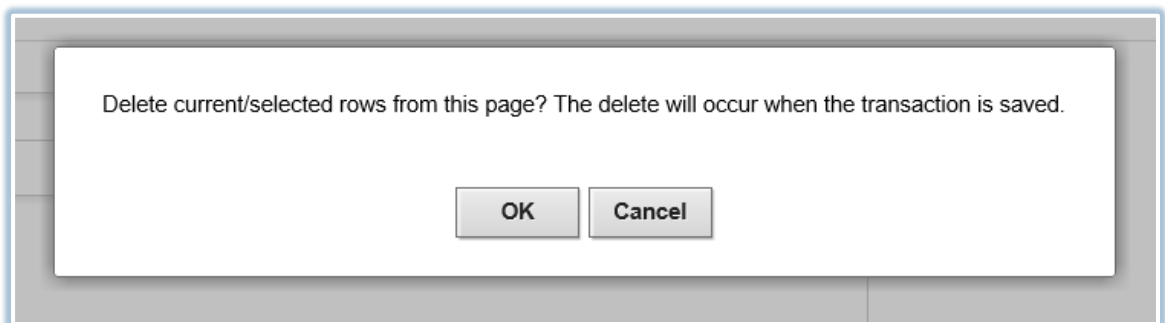
## 6. DELETING NOTES AND ATTACHMENTS:

If required to delete a note or attachment as added in error, click on the **Delete**  icon next to the relevant record.

NOTE: If you are deleting a note that has attachments, you will need to delete all the attachments on that note before deleting the actual note.

### Confirm deletion of a note:

After clicking on the **delete** icon next to a note, a message will be displayed. Select **OK** to delete the note or **Cancel** to close the message and return to the Notes tab with the note remaining on the case.



### Confirm deletion of an attachment:

After clicking on the delete icon next to an attachment, a message will be displayed and will include the file name of the attachment to be deleted. Ensure this is the correct file and click on **OK** to delete the attachment or click on **Cancel** to navigate back to the Notes tab.

