



Intensive Case Management – Notes and Documents

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.

1. ADDING A NOTE:

Navigate to the Intensive Case Management Case.

Click on the **Notes** tab.

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

- 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.

The screenshot shows the 'Add a Note' form in the Intensive Case Management system. The form is titled 'Add a Note' and is located under the 'Notes (0)' tab. The form includes a 'Notes Summary' section with the message 'There are No Notes and Attachments for this Activity ID'. Below this, the 'Add a Note' form is displayed. It includes fields for 'Added' (17/08/2020 3:49PM), 'HILL, Melanie', '*File Note Type' (A), '*Document Date' (B), '*Subject' (C), '*Author' (D), '*Role/Position' (E), 'Attendees' (F), and 'Details' (G). The form also has an 'Apply Note' button and an 'Add an Attachment' link.



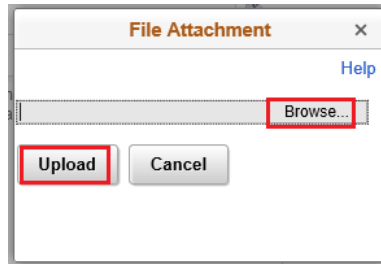
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2. ADDING AN ATTACHMENT:

Click on **Add an Attachment** link.



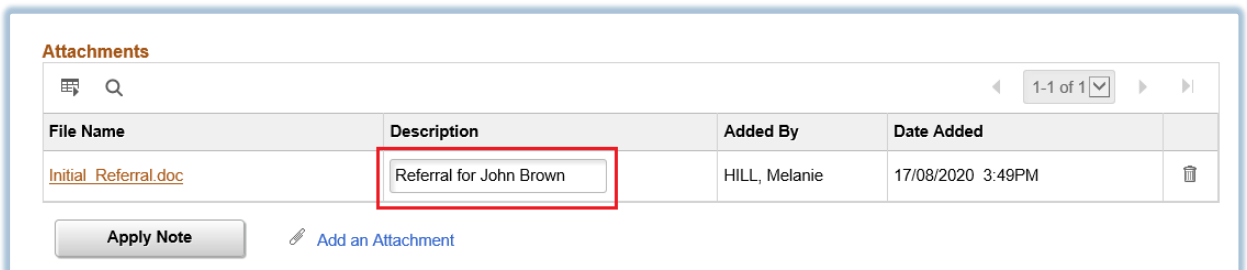
Click on **Browse** and select a document from your PC and click **Upload** button.



3. ENTERING IN DETAILS OF ATTACHMENT:

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

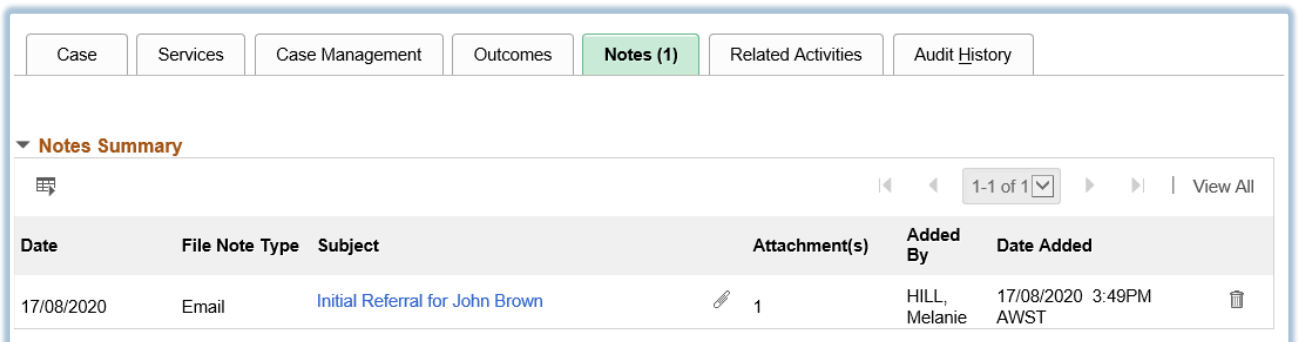
Description is a free text field – record an appropriate description of the attachment that's been uploaded to the note.



4. SAVING THE NOTE:

Click **Apply Note** button

The note now displays in Notes Summary.





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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.

Case Services Case Management Outcomes **Notes (1)** Related Activities Audit History

Notes Summary

| Date | File Note Type | Subject | Attachment(s) | Added By |
|------------|----------------|---|---------------|---------------|
| 17/08/2020 | Email | Initial Referral for John Brown | 1 | HILL, Melanie |

Add Note

Note Details

Added 17/08/2020 3:49PM HILL, Melanie *File Note Type Email

*Subject Initial Referral for John Brown