

Summary

Use the Case/Assessments page to add new case notes or view case note histories. An application must be locked and verified to add a case note.



Add Case Notes: on Case/Assessments Page

Locate client using the **LOOK-UP Search Bar** or **MY CASES** slide over.

Use the **Client Notes** tab to click on **ADD**

+ ADD to add a new note.

- In **Add New Note** popup window, enter the required information:
 - Select if note is for **All Members** or **Individual**.
 - Complete required dropdown fields.
 - Enter note.
 - Click **SAVE**
 - Case note will display on the Client Notes page.
 - In the **Save** popup window, select:
 - **Save and Lock** will permanently lock a note.
 - **Save Only** is a temporary lock, allowing for edits at a later time.
 - Click on **EDIT** next to a case note to **Edit Case Note**.

To create a reminder **Follow Up**, click on the

FOLLOWUP button.

- In the **Follow Up** popup window, complete the required dropdown field and enter a comment.
- Click **SAVE**

Client Notes

CASE HISTORY **+ ADD** CASE NOTES HISTORY FOLLOWUP

Applicant: Ethan Farr
HCOHealthCare_New_Enrollment [4002633]

11/29/2021 HealthCare [Complete] [Hillsborough County Center] Create Date: 11/29/2021

Subject:

| | | | | | |
|------------|------------|------------|---------|-------------------------------|-------------------------------------|
| Staff | HCOProject | Units | 0 | Lock <input type="checkbox"/> | Group Edit <input type="checkbox"/> |
| Start Date | 11/29/2021 | Start Time | 6:59 AM | Note Type | Case Review |

Note Details

Followup Checking on Progress Status

Outcome: Current []

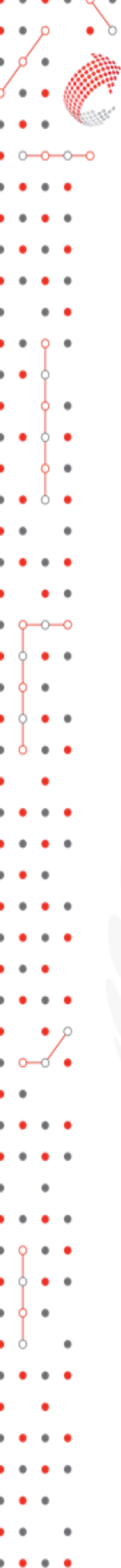
Add New Note

All Members Individual

| | | | |
|--------------|--------------------------------------|-----------------|----------------------------|
| Domain * | HealthCare | Case Activity * | Case Note |
| Staff * | HCOProject | Consent | System |
| Start Date * | 11/29/2021 | Start Time | 6:59 AM |
| Units | | Units * | 1 |
| Status | Complete | Location | Hillsborough County Center |
| Note Type * | Case Review | Contact | |
| Subject | | | |
| Note * | Followup Checking on Progress Status | | |

PERFORMANCE INDICATOR
Not available

Save Close



View Case Notes History: on Case/Assessments Page

Locate client using the **LOOK-UP Search Bar** or **MY CASES** slide over.

Use the **Client Notes** tab to click on **CASE NOTES HISTORY**.

- **Case Notes History** popup window will display client case note history.
 - Select to view
- Click **Close**

Use **Case Note** slide over to search for a case note.

- Case note results will display
- Select to view

The screenshot shows the ADSYSTECH interface. At the top, there is a 'Look-Up' search bar with fields for First Name, Last Name, Identifier, and SSN, and a Search button. To the right, the Account Owner is identified as Camden Hall. Below the search bar, there are tabs for 'Client Notes' and 'CASE NOTES HISTORY'. The 'CASE NOTES HISTORY' tab is selected, and a 'Case Notes History' popup window is open. This window contains a search bar with 'ALL' selected and a Search button. Below the search bar is a table with the following data:

| Name | Note Type | Staff | Note Date | Amount | Program | Program Date |
|-------------|-----------|------------|------------|--------|-----------|--------------|
| Camden Hall | Approval | HCOProject | 11/17/2021 | | HCO_HC... | 11/17/2021 - |

At the bottom of the popup window, there is a 'Close' button and a pagination indicator showing '1 - 1 of 1 items'.