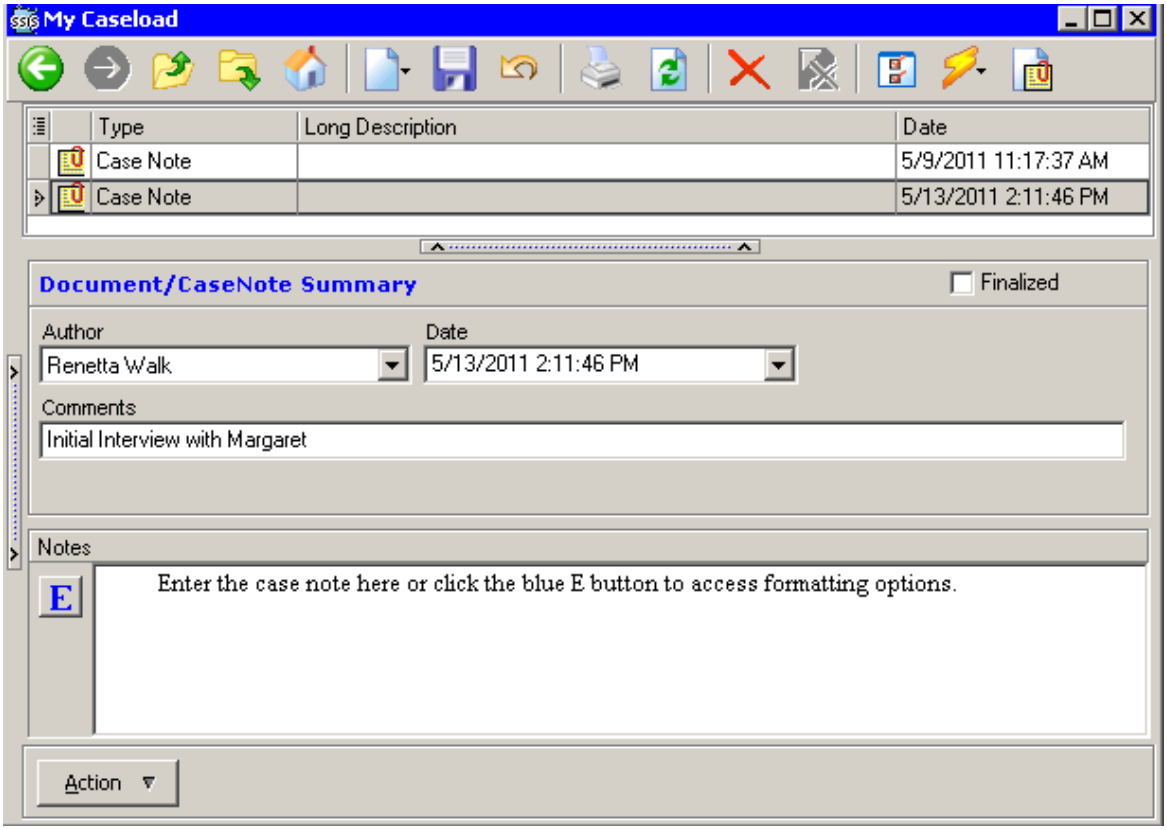
Case Notes

Enter case notes to document day-to-day information in a workgroup. Workers may enter case notes to summarize a day's contacts or workgroup activities (such as an assessment summary). Workers also enter case notes after they review a newly assigned workgroup or to document case closing reasons. In addition, workers may enter case notes when they need to document information in a workgroup in which they are not assigned, but have information to document that does not include time. Supervisors may also use case notes as a means to document information in a worker's workgroup.

Workers can enter a case note within the Contact/Activity screen in the Notes section, or they can create just a case note without associating any time with the note. The case notes remain with the workgroup, not a particular client.

Finalizing case notes prevents deletion or editing of the note. SSIS finalizes case notes automatically 30 days from creation. Workers can manually finalize case notes to lock the note at any time prior to the note finalizing automatically. Finalizing a case note is not reversible.

Case Note Screen

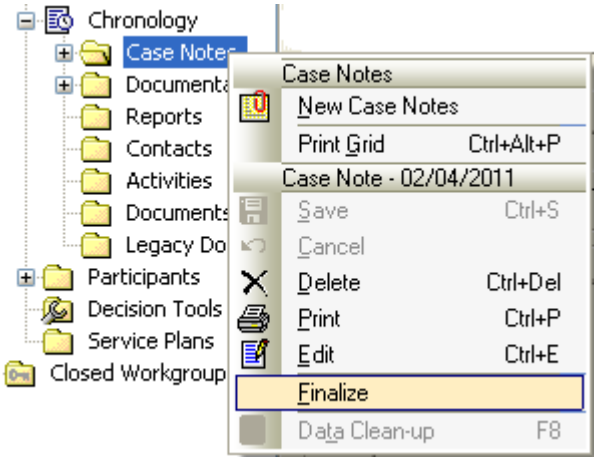


To Enter A Case Note:

1. Expand the Workgroup node and highlight the **Chronology** folder.
2. Access the **Action** menu and select **New Case Note**.
3. Adjust the **Filter** section, if applicable.
4. Edit the date and/or time in the **Date** field.
5. Enter the purpose of the case notes in the **Comments** field, if applicable.
6. Enter case notes in the **Notes** section or click the blue **E** button to open the editor to use the formatting options.
7. Click **Save**.

Hint: Text entered in the Comments field on the Case Note Entry screen displays in the Long Description column in the grid.

Case Notes Action Menu



To Finalize Case Notes:

1. Access finalize option:
   - From the **Chronology** node on the Tree View
   - From the **Case Notes** folder on the Tree View
   - From the grid, highlight the case note.
   - From the Case Note Entry screen.
2. Select **Finalize**.
3. Click **Yes** to Finalize.