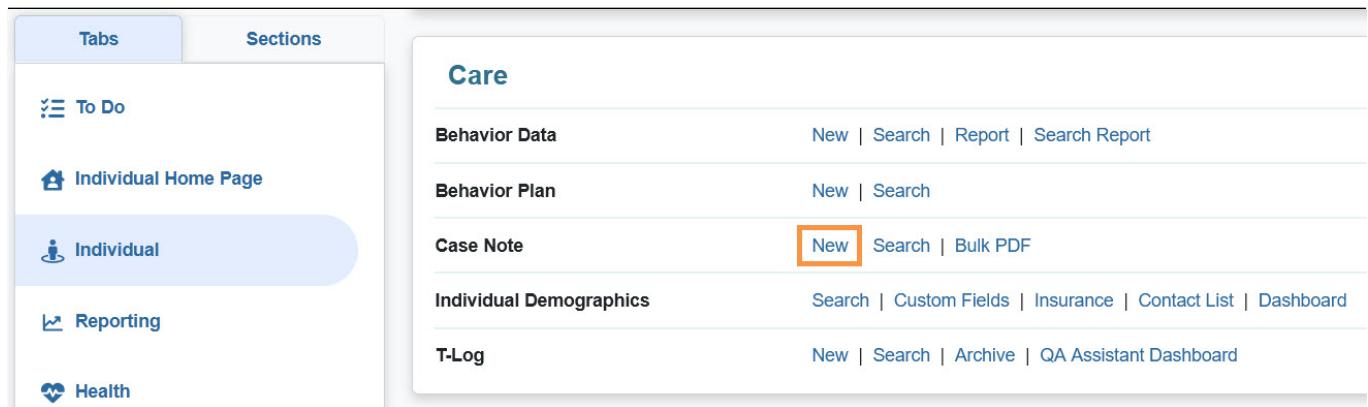


Create Case Note

Users with the **Case Note Edit** role will be able to save and submit Case Notes for individuals in *Admitted* and *Pending Admission* status.

1. Click on the **New** link beside the Case Note option from the **Individual** tab.



The screenshot shows the Therap Global software interface. On the left, there is a sidebar with tabs: 'To Do', 'Individual Home Page', 'Individual', 'Reporting', and 'Health'. The 'Individual' tab is selected and highlighted with a blue background. On the right, under the 'Care' section, there is a list of items: 'Behavior Data', 'Behavior Plan', 'Case Note', 'Individual Demographics', and 'T-Log'. The 'Case Note' item has a 'New' button next to it, which is highlighted with an orange box. Below each item are links for 'Search', 'Report', 'Search Report', and 'Bulk PDF'.

Section	Item	Action Links
Care	Behavior Data	New Search Report Search Report
	Behavior Plan	New Search
	Case Note	New (highlighted) Search Bulk PDF
	Individual Demographics	Search Custom Fields Insurance Contact List Dashboard
	T-Log	New Search Archive QA Assistant Dashboard

2. On the next page, select the appropriate Individual from the **Individual List** to create a Case Note.

Individual List

All	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
15 ▾ Records																										
Last Name	▲	First Name	▼	Individual ID	▼	Birth Date	▼																			
Frances		Paul				02/28/2010																				
Patrick		Isaac		3231256		02/12/2009																				
Paulo		Joseph				01/15/2005																				
Solomon		Patrick				06/10/2001																				

3. On the 'New Case Note' page, select the date for which you want to create a Case Note by clicking on the calendar icon beside the **Service Date** field. Select the template from the drop down list in the **Select Template** field.

New Case Note

You don't have any default Case Note Template selected currently.

Select Date and Template

* Service Date	04/02/2020 			
* Select Template	- Please Select - 			
Back	Submit			
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> - Please Select - </div> <div style="background-color: #e0f2f1; padding: 5px; border: 1px solid #ccc; display: none;"> PLP Case Study / DEMOTG-TGD Reading Assessment / DEMOTG-TGD Development Assessment / DEMOTG-TGD Demo Disability Identification / DEMOTG-TGD </div>				
<p>Existing Case Note(s)</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; vertical-align: top;">Individual Name</td> <td style="width: 85%; vertical-align: top; padding-left: 10px;">No existing Case Note(s) available under this individual</td> </tr> </table> <p style="text-align: right; margin-top: 10px;">10 ▾ Records</p>			Individual Name	No existing Case Note(s) available under this individual
Individual Name	No existing Case Note(s) available under this individual			

4. Click on the **Next** button.

Select Date and Template

* Service Date: 04/02/2020 

* Select Template: Demo Disability Identification / DEMOTG-TGD 

Note: The Templates which will be displayed in the Select Template field need to be selected from the Template Configuration option. For more information, [click here](#).

You will be directed to the **Case Note** page for the individual.

Case Note New

No service authorization was found for this individual

Template: (Demo) Disability Identification

Case Note Details

Individual: Isaac Patrick, 3231256 

* Service Provider:

Service Date: 04/02/2020

* Time Duration (Minutes):

Service & Unit Rate (\$):

* Activity Type:

* Location:

* Face to Face: Yes No

* Questionnaire

WG Short Set of Questions on Disability

No Question Answered **Open**

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Note

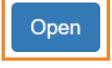
B **I** **U**                                 |
* Service Provider	<input type="text" value="Rahman, Imran / Teacher"/>
Service Date	04/02/2020
* Time Duration (Minutes)	<input type="text" value="30"/>
Service & Unit Rate (\$)	<input type="text" value="- Please Select -"/>
* Activity Type	<input type="text" value="Assessment"/>
* Location	<input type="text" value="School"/>
* Face to Face	<input checked="" type="radio"/> Yes <input type="radio"/> No

You may click on the **Open** button to answer questions of the attached Questionnaire. If the 'Questionnaire' section is marked with a red star (asterisk) then you need to complete the questionnaire in order to save the **Case Note**.

* **Questionnaire**

WG Short Set of Questions on Disability

No Question Answered



To learn how to answer the questions of a Questionnaire, [click here](#).

You can attach files in the 'Attachment(s)' section provided that the size of each file is within 3 MB and the total size of the files is 10 MB or less. Files can be added from the user's workstation.

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File

Scan File

You can add details or comments for the Case Note in the **Note** text box which has a limit of 30,000 characters.

Note

B I U  11pt   

Patrick states that he sometimes finds it difficult following a conversation, especially in group situations. He often has to ask his friends repeat themselves. Often He doesn't realize that someone is calling him, especially the person is another room or if it is a very noisy classroom, His parents added he often asks for the volume of the TV or stereo to be turned up or sits closer to them to hear properly.

His parents were advised to take him to an audiologist for identifying if he has any hearing loss.

P

5. After entering the necessary information, Click on the **Submit** button located at the bottom if you are finished with the case note. You may choose the **Save** button if you want

to add additional information later.

[Cancel](#) [Back](#)

[Save](#) [Submit](#)

6. You will receive a warning message while submitting a Case Note stating: *You attest that you have reviewed the content and verified the information provided is true and accurate.* Click on the **Yes** button to submit the form.

You attest that you have reviewed the content and verified the information provided is true and accurate.

[No](#)

[Yes](#)

You will receive a confirmation message if the Case note has been successfully saved / submitted. You can choose to go back to the form, the Individual List, the Dashboard, or to create a new Case Note from this page by clicking on the respective links.

The form CN-DEMOTPHL-J6V4ND2ZPMULK has been Successfully Submitted

[Back to Form](#)

Actions

[Create New](#)

[Individual List](#)

[Back to Dashboard](#)