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.

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

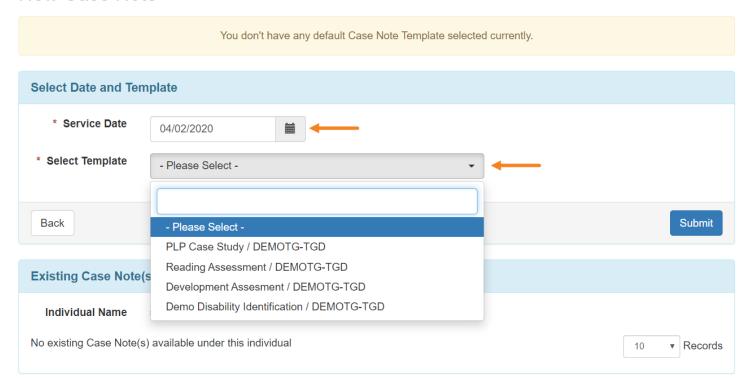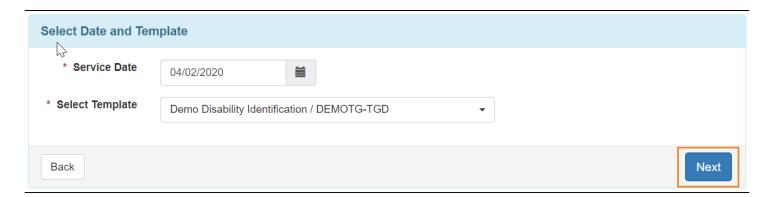| Last Name ▲	First Name ⇕	Individual ID ⇕	Birth Date
Frances	Paul		02/28/2010
Patrick	Isaac	3231256	02/12/2009
Paulo	Joseph		01/15/2005
Solomon	Patrick		06/10/2001

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 - ▼ ←

- Please Select -
- PLP Case Study / DEMOTG-TGD
- Reading Assessment / DEMOTG-TGD
- Development Assesment / DEMOTG-TGD
- Demo Disability Identification / DEMOTG-TGD

Back   Submit

Existing Case Note(s

Individual Name

No existing Case Note(s) available under this individual   10 ▼ Records

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

Select Date and Template

* **Service Date**	04/02/2020 📅
* **Select Template**	Demo Disability Identification / DEMOTG-TGD ▼

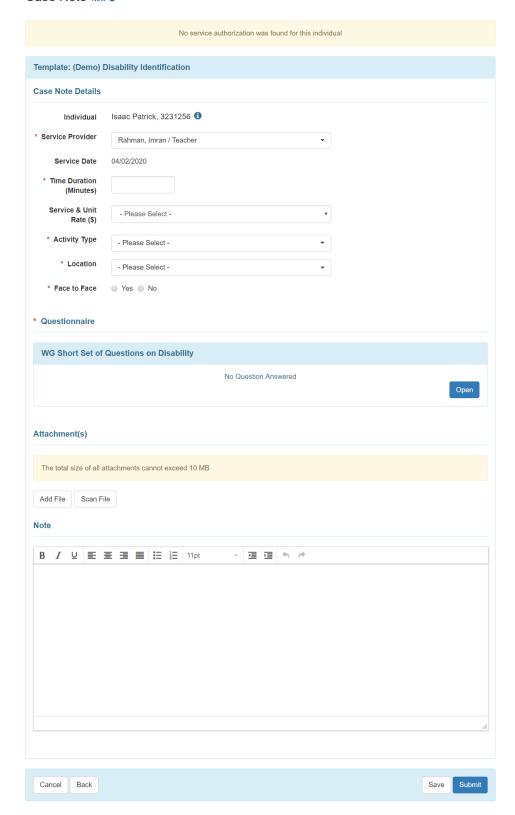Back   Next

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**.

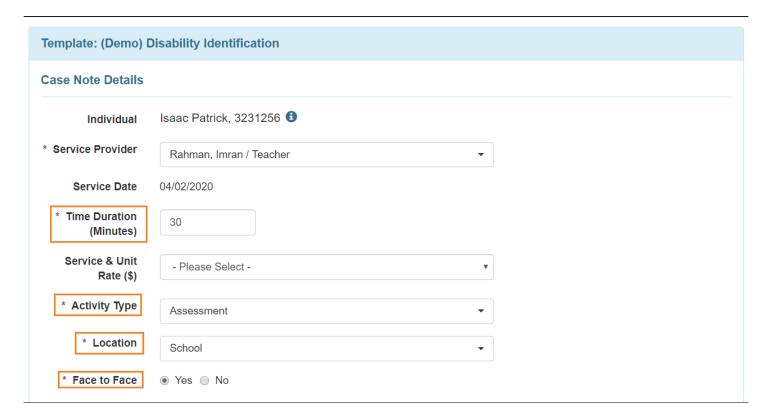You will be directed to the **Case Note** page for the individual.

Case Note New ⓘ

No service authorization was found for this individual

Template: (Demo) Disability Identification

Case Note Details

Individual	Isaac Patrick, 3231256 ⓘ
* Service Provider	Rahman, Imran / Teacher ▾
Service Date	04/02/2020
* Time Duration (Minutes)	
Service & Unit Rate ($)	- Please Select - ▾
* Activity Type	- Please Select - ▾
* Location	- Please Select - ▾
* 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

[Add File] [Scan File]

Note

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[Cancel] [Back]   [Save] [Submit]

In the Case Note Details section, fields such as Time From-To / Time Duration (Minutes), Activity Type, Location, and Questionnaire, Face to Face etc. will be populated from the Template (*fields presented in this section are based on the 'Field Properties' selection at the time of creating a Case Note Template; to learn about it* [click here](#)) .

Fields marked with red stars (asterisks) are required.

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**.
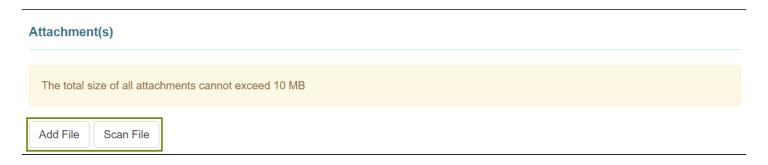
* Questionnaire

WG Short Set of Questions on Disability

No Question Answered

Open

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

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.

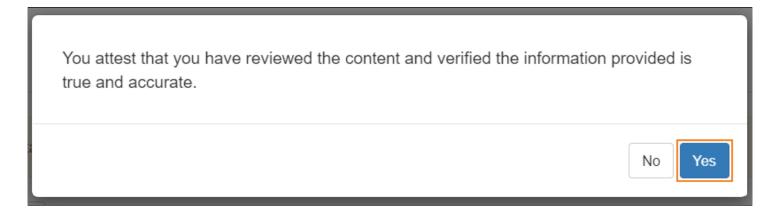His parents were advised to take him to an audiologist for identifying if he has any hearing loss.

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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