

Create Location and Activity Type for Case Note Templates

Users assigned with the **Provider Setup** administrative role will be able to create **Locations** and **Activity Types** for Case Note Templates.

Create Location

The **Location** in Case Notes may refer to the place where services are being provided, the individual is residing, or the meeting has taken place.

1. Click on the **Manage Location** link beside the Case Note Template option from the **Admin** tab.

To Do	General	
Individual	Provider	Preferences Password Policy Archive Preference
Health	User	New List Import from Excel Search Imported Excel Titles New Title Assign External System ID
Agency	Questionnaire	Create Search
Billing	Case Note Template	Manage Location Manage Activity Type Create Template Search Template Template Configuration
Admin		

2. On the **Manage Location** page, enter the **Location** name in the **Location** field and click on the **Create** button. A **Location** cannot be edited or deleted once it is created.

Manage Location

Create Location

* Location

Therapy Centre

Cancel

Create

Location List

Clicking on the arrow beside the '**Location List**' section will expand the list of saved **Locations**.

Location List

Location List

Filter

10 Records

Name	Created By	Create Date
Hearbetter	Anwar Hossain	05/18/2020
Community	Johanna Kroth	02/22/2019
Mental Health Association	Johanna Kroth	02/22/2019
Home	Ken Slavin	02/04/2019
Office	Ken Slavin	01/28/2019
School	Ken Slavin	01/28/2019

Showing 1 to 6 of 6 entries

Create Activity Type

The **Activity Type** in Case Notes may refer to the type of visit or the purpose of the visit.

1. Click on the **Manage Activity Type** link beside the Case Note Template option from the **Admin** tab.

To Do	General	
Individual		
Health		
Agency		
Billing		
Admin		
	Provider	Preferences Password Policy Archive Preference
	User	New List Import from Excel Search Imported Excel Titles New Title Assign External System ID
	Questionnaire	Create Search
	Case Note Template	Manage Location Manage Activity Type Create Template Search Template Template Configuration

2. On the **Manage Activity Type** page, enter a name in the 'Activity Type' field and click on the **Create** button. An Activity Type cannot be edited or deleted once it is created.

Manage Activity Type

Create Activity Type


* Activity Type

Monthly Review


Cancel


Create

Activity Type List



Clicking on the arrow beside the '**Activity Type List**' section will expand the list of saved Activity Types.

Activity Type List


Activity Type List


Filter

10
Records

Name	Created By	Create Date
Quarterly Evaluation	Ken Slavin	03/03/2019
Speech Language	Ken Slavin	01/28/2019
Assessment	Ken Slavin	01/28/2019
Review	Ken Slavin	01/28/2019

Showing 1 to 5 of 5 entries

Notes: Once locations and activity types have been added they will be available when creating case note templates.