

Create Activity Types for Case Note Templates

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	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 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

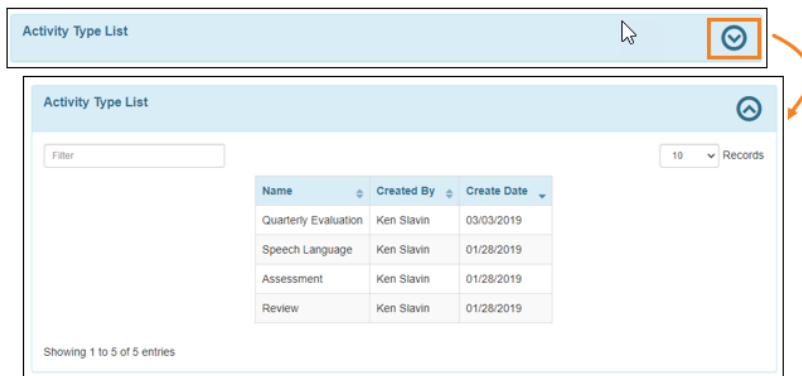
Monthly Review

Cancel

Create

Activity Type List

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



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