Search and Edit Case Note
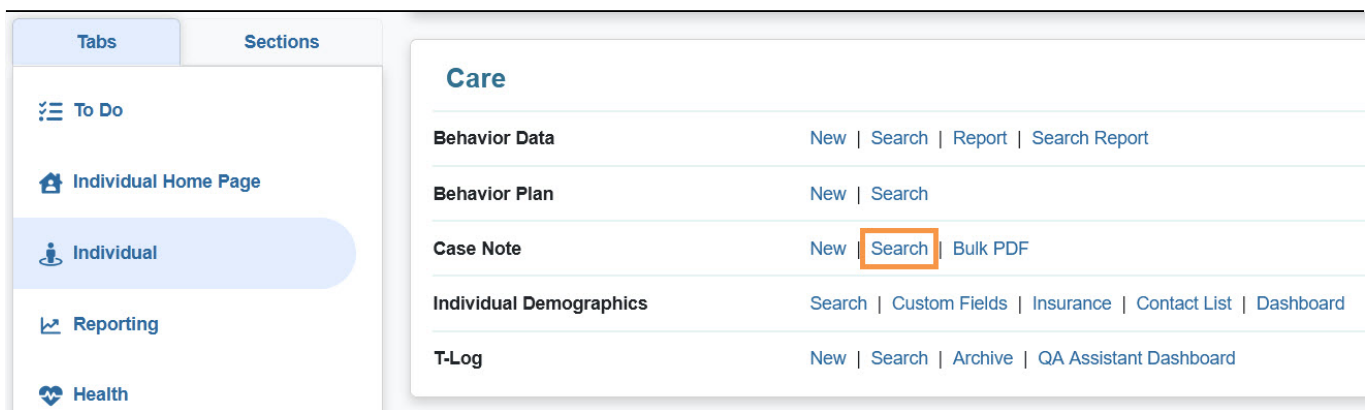
Users with the *Case Note View* super role will be able to search Case Notes for individuals.

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

2. On the **Case Note Search** page, enter the name of an **Individual** or select a **Service Date Range** for case notes of multiple individuals using the calendar. Click on the **Search** button after filling up the necessary fields.

Case Note Search

Please select either an Individual or a Form ID or a Medicaid Number or a valid Service Date range

→ Individual	Angela Mary 🔍
Service Provider	Search
Form ID	
Medicaid Number	
→ Service Date From	03/01/2024 📅
To	MM/DD/YYYY 📅
Status	- Please Select - ▾
Template Name	- Please Select - ▾

🧽 Clear Selection

Cancel   Search

Note: You also may use the additional optional fields presented to filter and narrow your search results.

3. Now **Case Note Search** results will display the list of Case Notes based on the selected search criteria. From here, you can open your preferred case notes.

Case Note Search

Form ID	Template Name	Individual	Medicaid Number	Service Date	Submit Date	Note	Entered By	Service Provider	Billing Description Code	Location	Activity Type	Billable	Time From	Time To	Time Duration (Minutes)	Status	Time Zone
CN-DEMOTPHL-N544NCCWH84ZS	TGD Pre-Assessment Form (Version 1.0)	Mary, Angela	N/A	03/20/2024	03/20/2024	Need to handle her very c...	Akter, Amina / Academic Coordinator	Akter, Amina / Academic Coordinator								Submitted	Asia/Manila
CN-DEMOTPHL-N544NCCVQ84ZK	CDC Assessment	Mary, Angela	N/A	03/12/2024	03/12/2024	Demo Note Information.	Akter, Amina / Academic Coordinator	Akter, Amina / Academic Coordinator								Submitted	Asia/Manila
CN-DEMOTPHL-N4W4NC6ZP842C	TGD Pre-Assessment Form (Version 1.0)	Mary, Angela	N/A	03/10/2024	03/10/2024	Need to handle her very c...	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator								Submitted	Asia/Manila
CN-DEMOTPHL-N4W4NC6ZJ842S	CDC Assessment	Mary, Angela	N/A	03/03/2024	03/03/2024	Demo Note Information.	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator								Submitted	Asia/Manila
CN-DEMOTPHL-N3X4NDCZZ833	CDC Assessment	Mary, Angela	N/A	03/02/2024	03/02/2024	Demo Note Information.	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator								Submitted	Asia/Manila
CN-DEMOTPHL-N3X4NDCZU8333	TGD Pre-Assessment Form (Version 1.0)	Mary, Angela	N/A	03/01/2024	03/01/2024	Need to handle her very c...	Hossain, Mariam / Special Educator	Hossain, Mariam / Special Educator								Submitted	Asia/Manila

Showing 1 to 6 of 6 entries

Previous | 1 | Next

Q New Search
⁂ Excel Exports

4. The **Case Note Submitted** page will show up. To edit the existing case note, click on the **Edit** button at the bottom right of the page.

Note: Users with the *Case Note Edit* super role will be able to edit Case Notes for individuals.

Case Note Submitted ⓘ

Template: TGD Pre-Assessment Form (Version 1.0)	

Case Note Details

Individual	Angela Mary ⓘ
Service Provider	Akter, Amina / Academic Coordinator
Service Date	05/09/2024

Questionnaire

TGD Pre-Assessment Form

Personal Information ❯	**Name**	Angela Ann Mary
Medical Information	**Date of Birth**	02/07/2024
Therapy/Service related Information	**Gender**	Female
Additional Information	**Father's Name**	Daniel Lorenz
	Mother's Name	Patricia Anne
	Address	1118 Roxas Boulevard, Philippines

Attachment(s)

Nothing Attached

Note

Mary needs to learn
Concentration
Communication
Climbing Steps
Behavior Management

🅟 Display PDF   ❮ Previous   Next ❯

Cancel   Back   SComm   Delete   Edit

5. Click on the field (**Service Provider**, **Questionnaire**, **Note**) that needs to be edited.

Note: The field **Service Date** can not be edited after being submitted.

Case Note Submitted ⓘ

Template: TGD Pre-Assessment Form (Version 1.0)

Case Note Details

Individual	Angela Mary ⓘ
* Service Provider	Akter, Amina / Academic Coordinator ▾
Service Date	05/09/2024

Questionnaire

TGD Pre-Assessment Form

- **Personal Information** ›
- Medical Information
- Therapy/Service related Information
- Additional Information

Name	Angela Ann Mary
Date of Birth	02/07/2024
Gender	Female
Father's Name	Daniel Lorenz
Mother's Name	Patricia Anne
Address	1118 Roxas Boulevard, Philippines

Open

Attachment(s)

The total size of all attachments cannot exceed 10 MB

Add File   **Scan File**

Note

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Mary needs to learn
Concentration
Communication
Climbing Steps
Behavior Management

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📄 Display PDF   **‹ Previous**   **Next ›**

Cancel   **Back**   **Update**

6. After making the necessary changes, click on the **Update** button at the bottom.

Cancel	Back		Update

A success message will appear.

The form CN-DEMOTPHL-N7B4NFKZZ833U has been successfully updated