

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

To Do		Issue Tracking		
Individual	T-Log	New Search Archive	My Issues	
Health	Case Note	New Search Bulk PDF Dashboard	SComm	

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 selec	t either an Individual or a Form I	D or a Medicaio	d Number or a valid Service Date range	
> Individual	Angela Mary	Q		
Service Provider	Search			
Form ID				
Medicaid Number				
Service Date From	03/01/2024			
То	MM/DD/YYYY			
Status	- Please Select -	•		
Template Name	- Please Select -	•		
Selection				
Cancel				Search

nerap Global

Person-Centered. Data-Driven.

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

Filter 15 v Record									✓ Records								
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									1 Next								
Q New Search																	

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 9

Template: TGD Pre-Assessment Form (Version 1.0)									
Case Note Details									
Individual Angela Ma Service Provider Akter, Ami Service Date 05/09/202 Questionnaire	ary 🕄 na / Academic Coordinator 4								
TGD Pre-Assessment Form	1								
Personal Information Medical Information Therapy/Service related Information Additional Information	Name Date of Birth Gender Father's Name Mother's Name Address	Angela Ann Mary 02/07/2024 Female Daniel Lorenz Patricia Anne 1118 Roxas Boulevard, Philippines							
Attachment(s) Nothing Attached Note Mary needs to learn Concentration Communication Climbing Steps Behavior Management									
Display PDF			<pre></pre>						
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 F	Form (Version 1.0))							
Case Note Details										
Individual * Service Provider	Individual Angela Mary Angela Mary Angela									
Service Date	05/09/2024									
Questionnaire										
TGD Pre-Assessn	nent Form									
Personal Informat	ion >		Name	Angela Ann M	Mary					
Medical Information	ı	D	ate of Birth	02/07/2024						
Therapy/Service re	lated									
Information	ion.	Fat	ther's Name	Daniel Lorenz	Z					
Additional Informati	ION	Mot	ther's Name	Patricia Anne						
			Address	1118 Roxas E	Boulevard, Philippines					
Attachment(s)						O	pen			
The total size of all att Add File Scan File	tachments canno	t exceed 10 MB								
Note										
BI⊻≡	* * =	i≣ i≣ 12pt	~	₫ ₫ (6 d					
Mary needs to learn Concentration Communication Climbing Steps Behavior Manageme	ent									
Display PDF						<pre> Previous Net</pre>	ext 🔉			
Cancel Back						u	pdate			



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



A success message will appear.

The form CN-DEMOTPHL-N7B4NFKZZ833U has been successfully updated