EHM

Case Notes

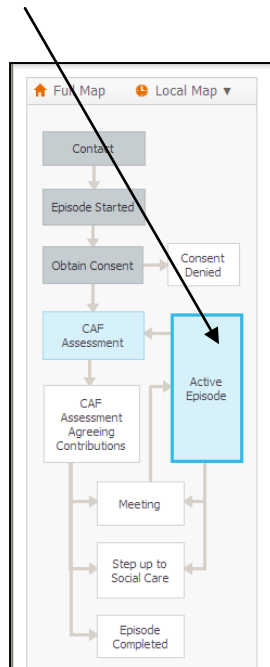**Document History**

Date	Version	Produced By	Comments
24/02/2015	1.0	Lynn Parsons	Created
23/01/2017	2.0	Lynn Parsons	Upgrade to Version 12

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Case Notes

Case Notes are accessed via the Active Episode box of the pathway.

Case notes appear in the left-hand menu of the Active Episode screen.
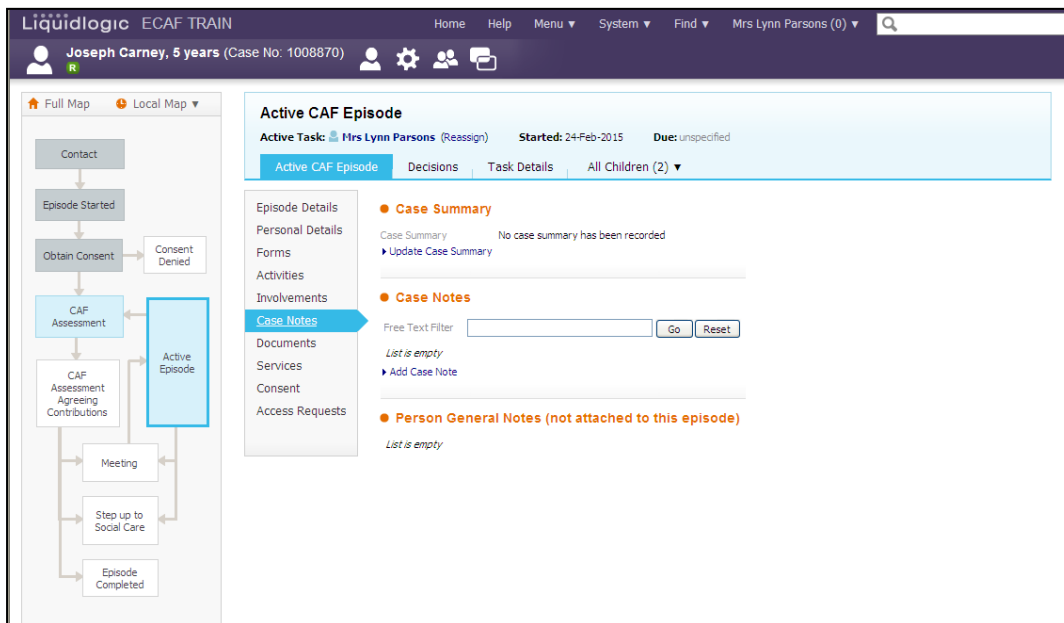
The Case Note tab lists all saved and finalised case notes. This tab also provides the ability to create a new case note, update an un-finalised case note, filter the list of case notes based on the entered free text criteria or produce case note reports.

Add new Case Note

Select the **Case Notes** tab and click **Add Case Note**
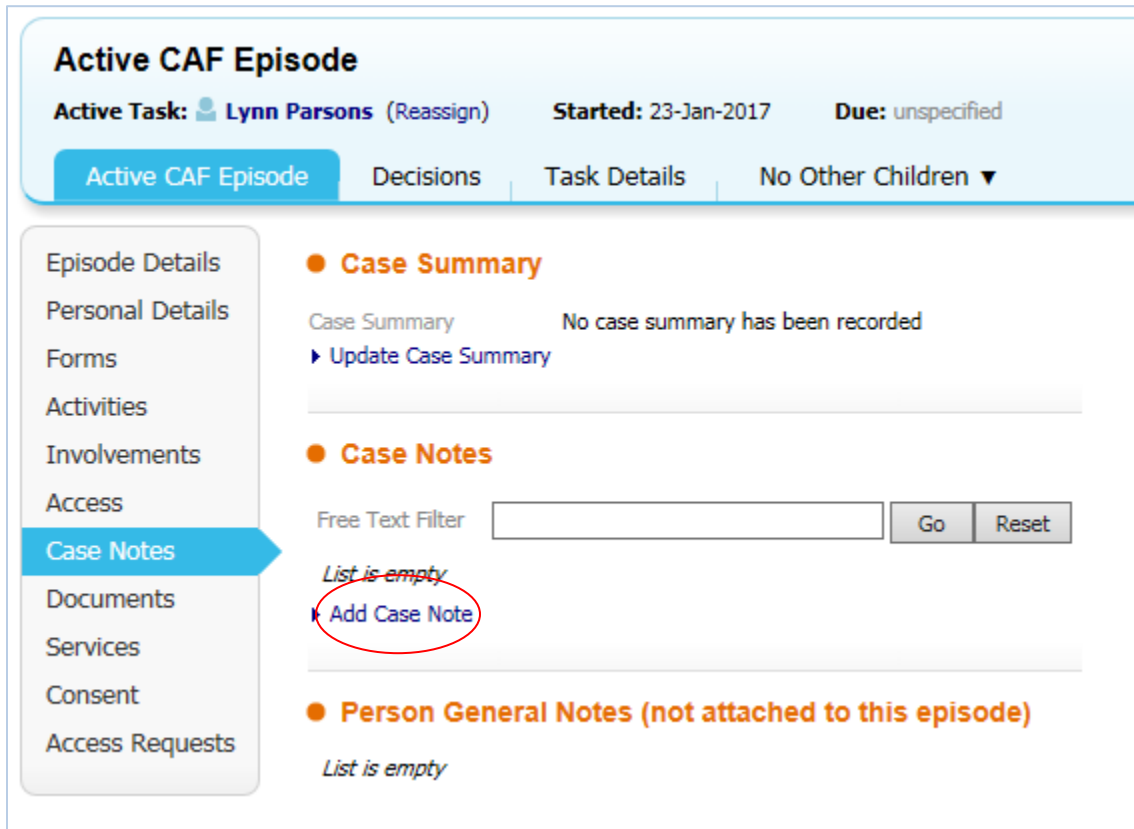
The Case Note screen will be displayed:
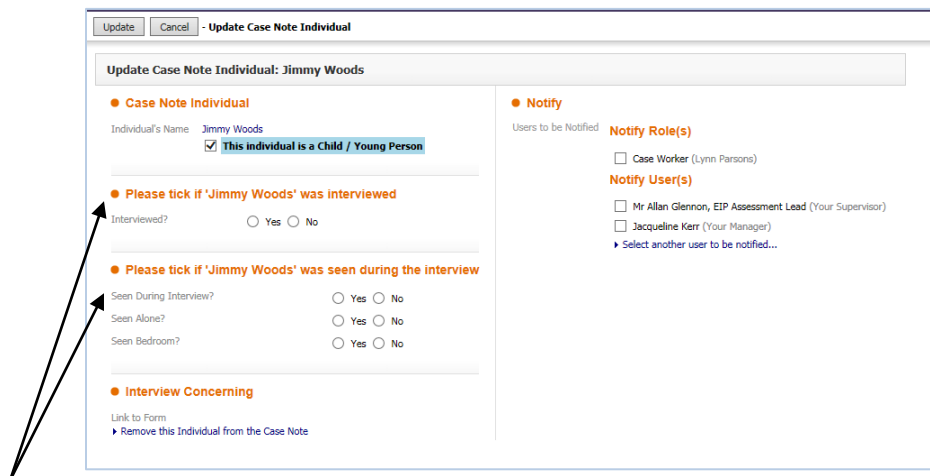
Use the **checkboxes** to indicate if the child/young person was interviewed and/or seen during the interview.

Use the **Notification checkboxes** (on the right-hand side) to specify which user/role will be notified about the case note.

You can use the **Select another user** to be notified link to manually specify another user from the Address Book to be notified about this case note.

Once the above information has been completed click on the **Update** button at the top of the screen.

The next screen displayed is in two parts:

- **Part 1 – Contact**
- **Part 2 – Write Up**

Part 1 – Contact

- The **From Context of** section at the top of the case note displays the name of the child/young person which the case note is about
- Enter the **Contact Date**. This is blank as default
- Choose a **Contact Type** from the drop down selection and then tick the box if this is a significant event AND/OR should be added to Chronology
- **Contact Regarding** displays the name of the child/young person involved in the case note and whether they were interviewed and/or seen during the interview.

NOTE: You can click on the details of the child/young person involved in this case note to update whether this person was interviewed/seen during the interview etc.

- Other relations can be identified as involved in the case note. If other relations are displayed you can select these family members and the case note will be added to their record as well as the current child. NOTE: If the family member selected does not have an open episode then the note will be recorded as a General Note and will be displayed outside of the episode and viewable by anyone accessing the child/young person's record.
- Enter a **Reason for Contact** - enter a brief description

- **Detailed Notes -** Enter more detailed information about the case note.

Part 2 – Write Up

Into each of the fields type the relevant information.

Once all the information has been entered into the case note click on **Finalise Case Note** under the Actions Section.

● Actions

▶ Finalise Case Note

You will be prompted to confirm you wish to Finalise the Case Note:-

Message from webpage   ✕

    ❓ Are you sure you wish to Finalise this Case Note?

                                                        OK   Cancel
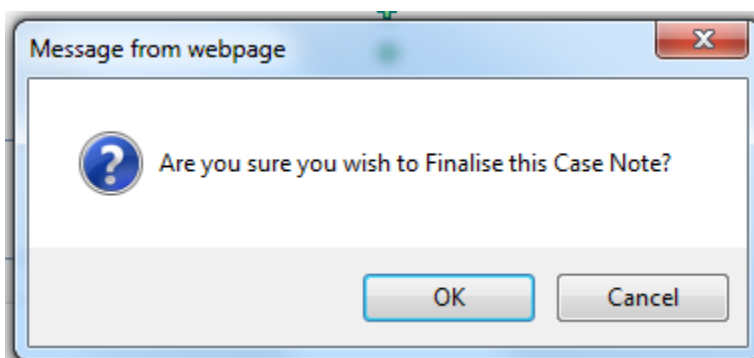
Note: If you have need to save the case note and add further information later then click on the **Create** link at the top of the page as this will enable you to return to the Case Note and finalise later.

Case Note Alerts

If the creator of a case note selected another user to be notified of the case note, an alert will appear in the notified user's worktray, see example below:

| No Due Date | 🖼️ 🖼️ 🖼️ | Jimmy Woods, 7 years [Case No: 1019411] | ⚠️ | **Case Notes** - This child has been added to a Case Note by Lynn Parsons |

- Click on the Case Note Notification

Alert for Child, created 23-Jan-2017 14:31

● Alert Details

Date Issued	23-Jan-2017 14:31
Assigned	Lynn Parsons
Subject	Case Notes
Description	This child has been added to a Case Note by Lynn Parsons

▸ View Case Note
▸ Alert Completed
▸ All Alerts Completed
▸ Reassign Alert

● Other Alerts

| Date Issued ▼	Due Date	Assigned	Task Assigned	Subject	Description	Person	Form
23-Jan-2017 14:33		Lynn Parsons	Lynn Parsons	Case Notes	This child has been added to a Case Note by Lynn Parsons	Jimmy Woods, 7 years	

- Click Alert Completed to remove the notification from the worktray

Free Text Filter

Free Text Filter on the Case Notes main screen allows the user to input free text and filter the list of case notes to only show case notes which contain the specified free text.

- Enter text in the **Free Text Filter** field and then click **Go**

● Case Notes

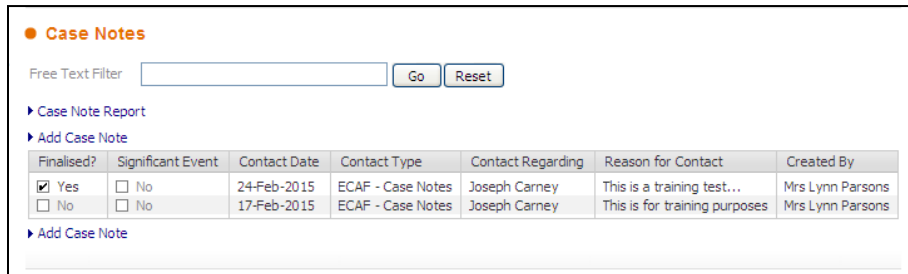| Free Text Filter	[ ]	Go	Reset
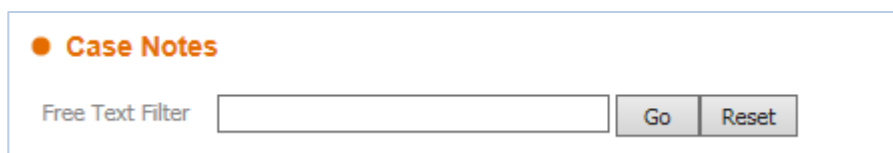
EHM will filter the list of case notes accordingly and only display case notes which contain the specified text.

Click **Reset** to display all case notes and remove the filter.

Viewing a Case Note

From the Case Notes list, click on the required case note to view it


NOTE: Case notes appear in the order they were created e.g. if three are created on the same day, then the oldest will appear at the bottom and the newest will appear at the top
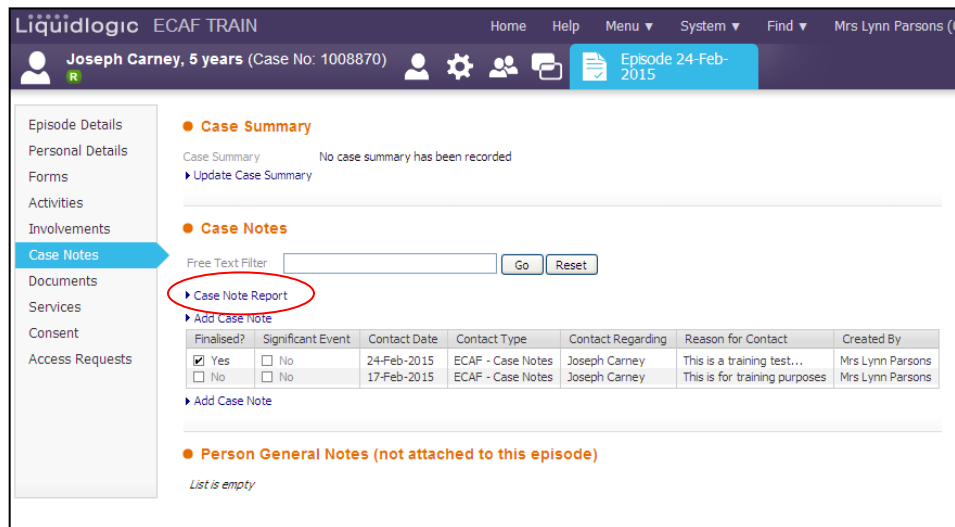
Case Note Audit

The **Audit** tab displays when and by whom the case note was created, modified, finalised and if anyone else was notified.

From the Case Notes list click on a case note to view it and select the **Audit** tab from the right-hand side to reveal the audit details
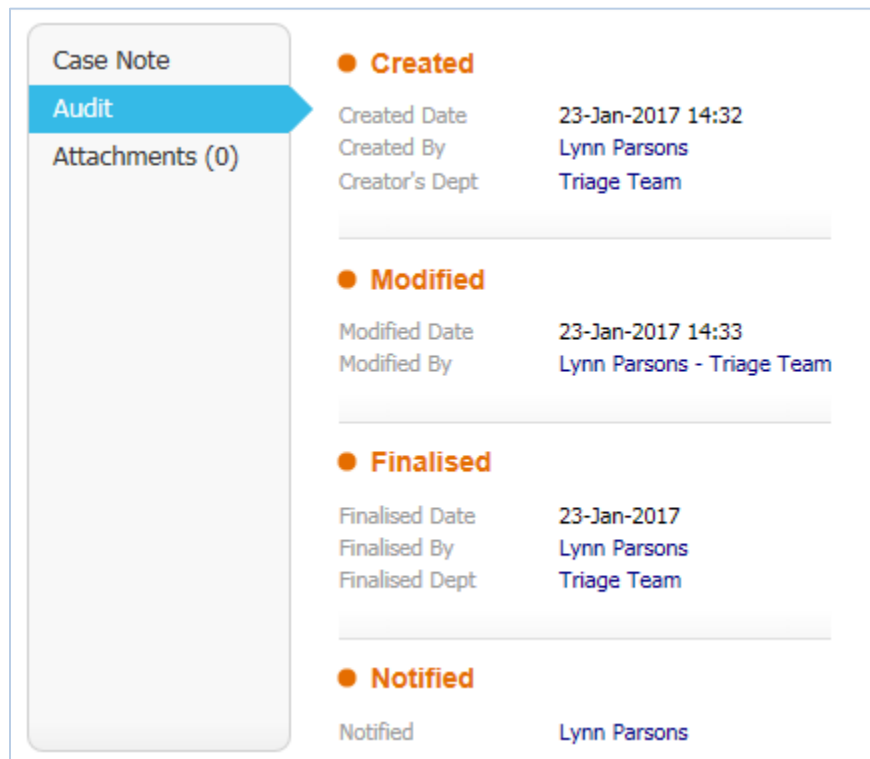
Case Note Report

- From the Case note screen click the **Case Note Report** link

You will be prompted to decide which type of case notes they wish to view using defined criteria:

- **Dates From and To** can be entered in the dates fields, if required
- Use the **Click here to select** a user link to specify which user or department has created the case note, if required
- You can choose to order the case notes so the newest case notes appear first by clicking on the tick box for Date Descending
- Once all of the information has been entered click Show Report

A screen similar to the following will be displayed:

X Close Printable View | Small **Medium** Large Largest | **Print** page now |

Case Note Report for Joseph Carney
Date: Tuesday, 24 February 2015, 11:58 • User: Mrs Lynn Parsons - CAF Team

Confidential Information

Child ID	1008870						
Contact Date	Tuesday 17 February, 2015	**Type of Contact**	ECAF - Case Notes	**Created By**	Mrs Lynn Parsons	**Finalised on**	*Not Finalised*
Reason for Contact	This is for training purposes						
Detailed Notes	This is for training purposes						
Analysis of Information	This is for training purposes						
Action	This is for training purposes						
Contact Date	Tuesday 24 February, 2015	**Type of Contact**	ECAF - Case Notes	**Created By**	Mrs Lynn Parsons	**Finalised on**	Tuesday 24 February, 2015
Reason for Contact	This is a training test...						
Detailed Notes	This is for training purposes						
Analysis of Information	This is for training purposes						
Action	This is for training purposes						

From this screen you can create a **printable view** ready to print out or create a **PDF version** by clicking the relevant selections at the top.