Client Case Management Encounter Screen

Home > Client Management (Search Client) > Case Management

Business Purpose:

The Case Management Encounter page displays a tabular listing of the client's case management records for all programs the user has access to.

How to:

1. A search can be performed by filtering the client's case management records by **Date Range From** and **To** dates, **Primary counsellor/Caseworker**, **Case Note Status** and **Components of Service**. For dates, click on the icon. For all other fields, click on the dropdown arrow.
2. The Note History icon can be clicked to see the current and all previous saved versions of the same case note.
3. The Edit/Sign Note icon can be clicked to edit the case note.
4. For each case management record, the **Last Updated Date**, **Note ID**, **Last updated User**, **Case Note Status** and **Program** are displayed. The left most column without header contains the action icons described in **2**. and **3**. Above.
5. Each of the column headings are clickable and will execute a sort alternating between ascending and descending based upon the column heading. (For example, when you click on the **Last Udpated Date**, the case management records are then sorted in ascending order, with the oldest **Last Updated Date** first.)

Important Notes:

1. The total number of records is shown at the bottom of every page.
2. **Case Note Status** can either be Complete or Incomplete.
3. A single case management record can have both a Note History action icon and a Edit/Sign Note action icon.