toronto SMIS
Shelter Management
Information System

TORONTO

Client Case Management Note Screen

Updated on February 2017

Home > Client Management (Search Client) > Case Management >
New Note/Update

Business Purpose:

The Case Management Note page allows the user to create a new or edit an incomplete Case Note.

How to:

1. To create a new Case Note, from the Case Management Encounter page, click the New Note action button to go to a new Case Note detail page.
2. To update/view an existing Case Note, from the Case Management Encounter page, click on the Note icon to edit the case note, or the icon to see the current and all previous saved versions of the same case note.
3. In the Case Management Note screen, select the **Encounter Type*** from a dropdown.
4. Select the **Program*** from the dropdown, for where the Case Note is written.
5. Add the **Components of Service*** that applies for this Case Note. Remove those that no longer applies to this Case Note.
6. Enter a detailed case note in the box provided. Use the Spell Check when necessary.
7. Specify the current **Case Note Status*** from the dropdown.
8. Click Save to save the Case Note.

Important Notes:

1. Once the Case Note is completed and saved, it can no longer be edited.
2. **Case Note Status*** can either be Complete or Incomplete.
3. All Case Note edits are saved as history and can be reviewed.