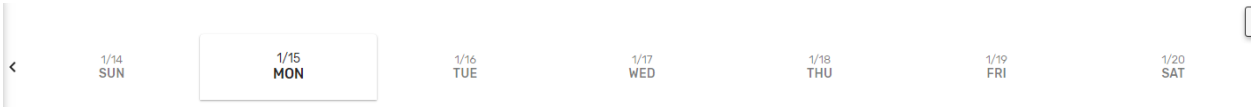
Anywhere Case Notes

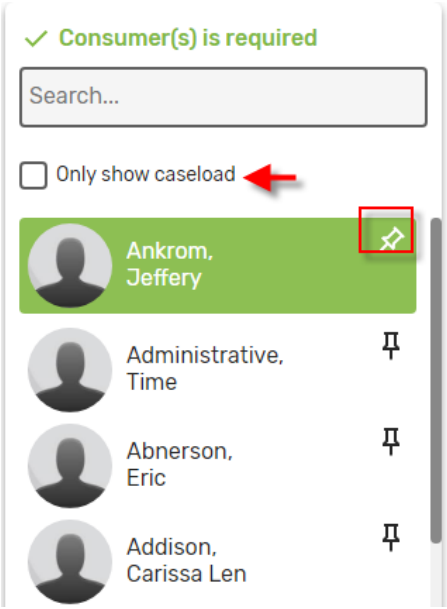
Inserting a New Case Note

- Select the Case Notes module on the Dashboard.
- The Case Note page will display four filter options for New Case Note Entry, New Note, Review Notes, and Edit My Phrases.

- To begin documenting a case note, select the New Case Note Entry button.
- A new screen will appear that has all elements needed to document a note.
    - Choose the date at the top of the page. As with all notes, users will be unable to document in the future. Also required fields will display with **RED** around the outer edge.

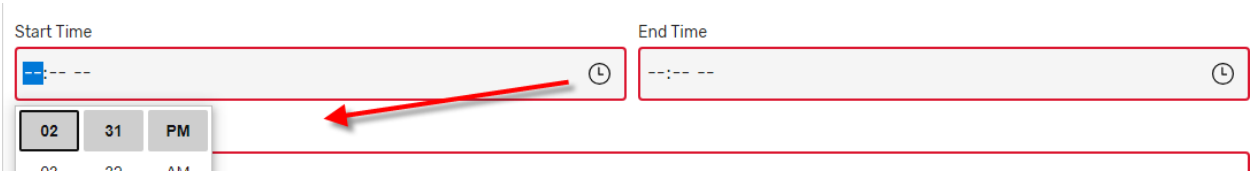


    - On the right side is a list of consumers that the user is authorized to see. Users may click on the 'only show caseload' to reduce the list.
    - A search box at the top will allow for pulling consumers based on a portion of the name.
    - Beside each consumer is a pin. Clicking on this pin moves the consumer to the top of the list for ease of locating him/her.
    - Click on the person to highlight green and add to the note.
        - If creating a group note, users should create the note then return to edit and add additional people to the note.

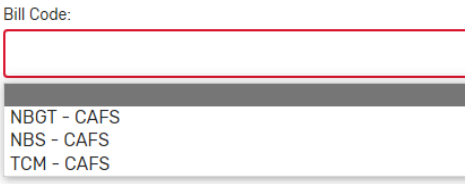


- The document timer will begin if the code requires documentation to be tracked.

- Fill in the start/end times.
  - Users may utilize the clocks or type directly in the page.



- Add the Billing Code.
  - A default code may be assigned to a Biller in the Edit Employees – General 2 tab.



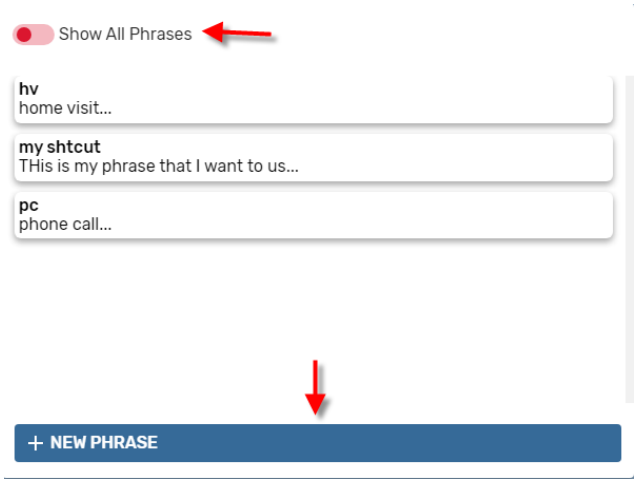
- Add Location/Service/Need/Contact, if required or desired.
  - These codes pull directly from Gatekeeper.
- The vendor will pre-populate after the consumer is selected.
- Create the note using voice to text (if contracted for it) or typing.
  - The box may be expanded by clicking on the square icon
- Add mileage and/or travel time, if required.
  - Mileage will be added as total miles.
  - Travel will be added as total minutes travelling to the location.

- If the agency is using the documentation timer, a message box will display. Select Yes or No to begin the timer for the case note.

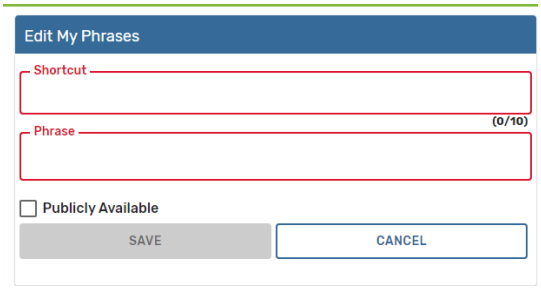
Anywhere Case Notes

Phrases/Editing Phrases

- When creating a note, users may enter **#ph** and a listing of personal phrases will appear.
    - Clicking on Show All Phrases displays all public phrases available.
    - Users may also click on 'Add New Phrase' to create a new one.



    - To leave this page without making changes, click outside the small box.
    - To Edit Phrases, go to Case Notes/Edit My Phrases.
        - Phrases may be added in this page as well.



Attachments

- Attachments may be added to the case note page directly.
- On the note, click on Add Attachments. The system will take you to your File Explorer to search for documents.
    - Once added, they will be listed on the case note.
    - Users may click the red trashcan to remove an attachment

Anywhere Case Notes

Saving a Note

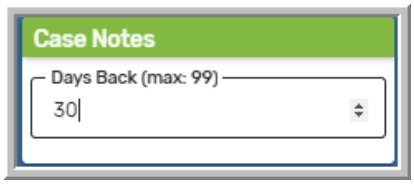
- Once all required data is inserted, there is an option to Save or Save and New option.

When 'Save' or 'Save and New' is selected, a prompt box with a green check mark will display, indicating the record was saved.

- If Cancel is selected, the case note will not be saved and the page will close. The program returns users to the main Case Note page.

Case Note Review

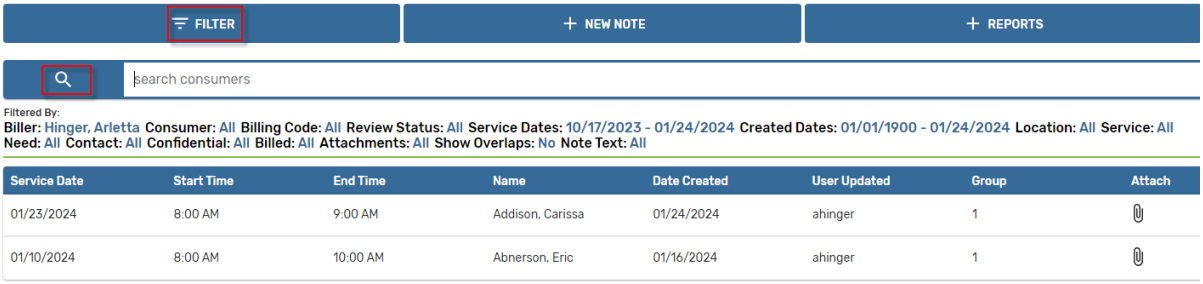
- Select Case Notes/Review Case Notes
- The Time Review page will display. The case notes displayed in the page will be based upon case note defaults (Case Notes days back- located in Settings on the dashboard).

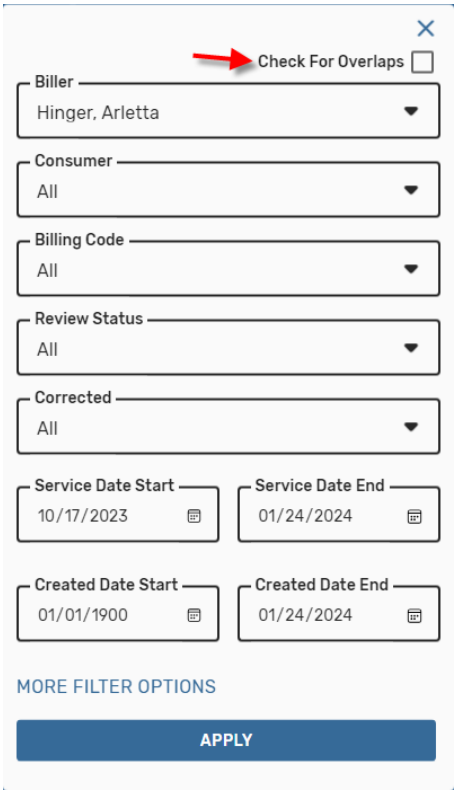


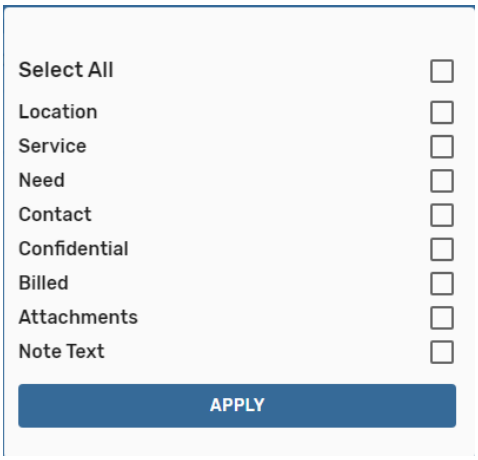
- This page has several filtering options that will allow users to retrieve case notes. There is a Search option and Filter option.
- The Search option
  - This option allows users to search for consumers by first name or last name.

- The Filter
  - When selected, a filter list will display various filtering options. Users can use one filtering option or combine multiple options to retrieve desired case notes.

Anywhere Case Notes





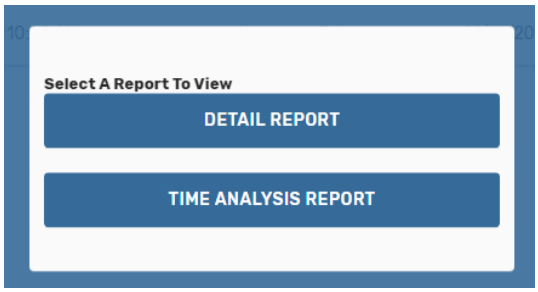


- If using case notes defaults, The Service Date Start and End Dates will populate dates based upon the criteria. Dates can be changed in this filter as needed.
- Once Apply is selected, all case notes meeting the search criteria will display in the time review page.
- When the More Filter Options is selected, users can select the desired options by placing a check mark in the box. When completed, select Apply.
    - This will take the user back to the filter. Update the filter to the requested information and select Apply again. All case notes meeting the selected criteria will display in the time review page.

Anywhere Case Notes

Review Case Notes

- To review an existing note, select the desired line entry from the time review page and the case note will be displayed.
    - If using the documentation timer, a prompt box will appear. Users can select to start the timer to capture additional minutes that are used to update the case note.
    - Once the case note is open, the case note can be updated or deleted. If cancel is selected, it will return the user to the time review page.
    - To view an existing attachment, select the attachments button and double click the file name. The file will appear at the bottom of the page, select open.
        - To delete the attachment, select the trash can icon in front of the file name. The file will display with a red line through the title. Once saved, the user will return to the case note page.
    - The Attachments button will no longer be highlighted in green and the count will return to zero.

List of Reports – found in Case Note Review page

- Case Note Detail
    - Lists all case note details for those selected in the filter
- Time Analysis Report
    - A timeline of notes based on time for the criteria listed in the filter