Case Notes

Purpose	Add and edit case notes in client records.
Who should do this	CAREWare users who document client contacts, services, and follow-up activity.
Use this guide when you need to	Enter a case note and resume an auto-saved draft.
Main warning	Case notes can contain sensitive client information. Confirm the correct client and review the note before saving.

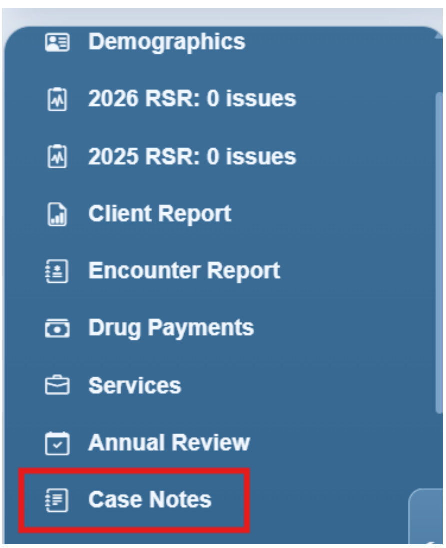
Quick path
Client record > Case Notes > Case Note Entry > Add

Before you begin

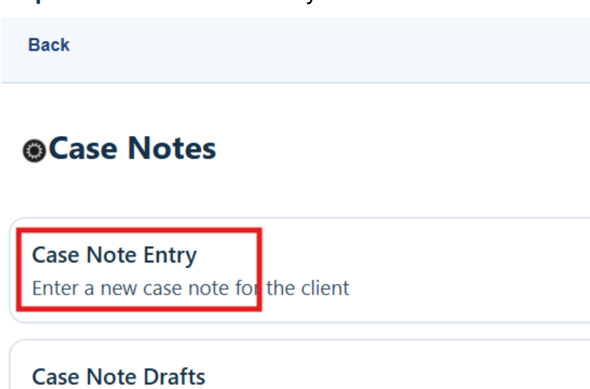
- Open the correct client record.
- Confirm that the case note author is available in Employee Setup.
- Have the case note date, author, comment, and note text ready.

Add a case note to a client record

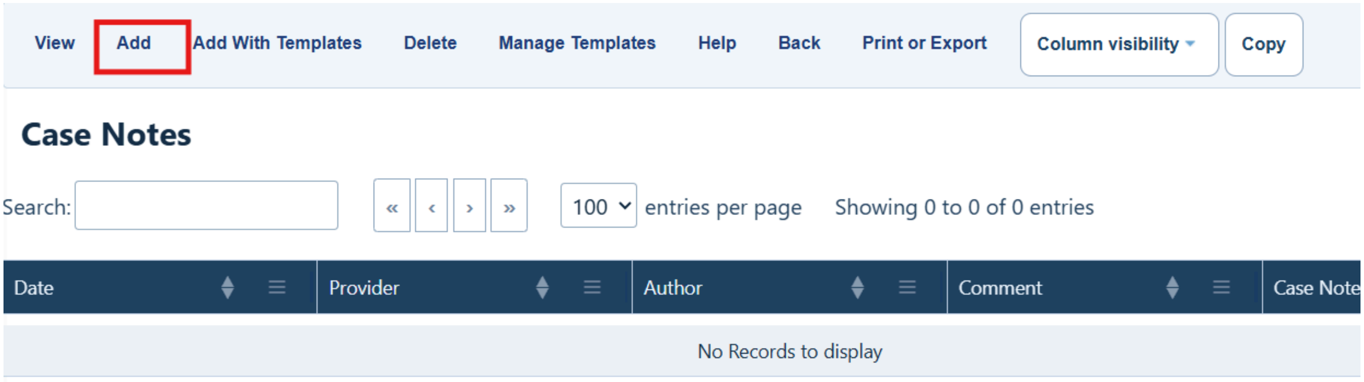
Step 1. Click Case Notes from the client menu.



Step 2. Click Case Note Entry.



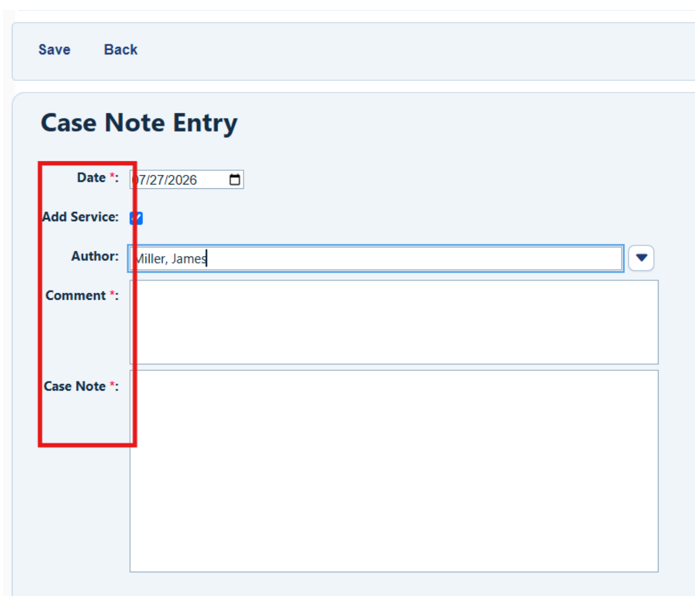
Step 3. Click Add.



Case Note Entry buttons

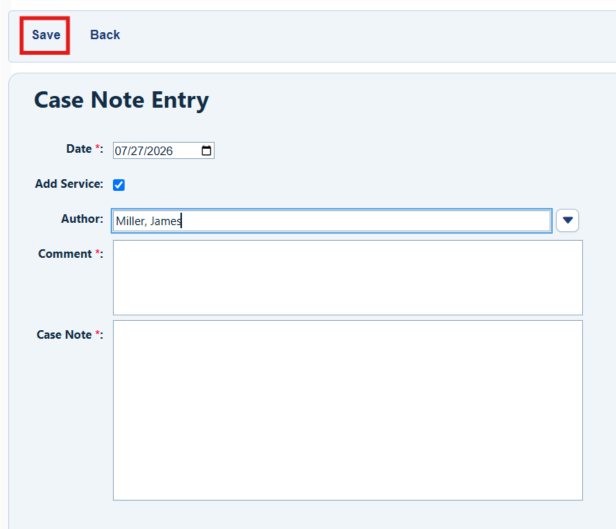
Item	What it does	When to use it
View	Opens the selected case note.	Review an existing note.
Add	Opens a blank case note entry.	Create a note without a template.
Add with Templates	Starts a note using a predefined format.	Use an approved, repeatable note structure.
Delete	Deletes the selected case note.	Remove a note only when authorized.
Manage Templates	Opens case note template management.	Create or maintain reusable formats.
Help	Opens CAREWare help for Case Notes.	Review additional product guidance.
Back	Returns to the Case Notes menu.	Leave Case Note Entry.
Print or Export	Prints or exports the case note list.	Produce a list for approved use.
Column Visibility	Controls columns displayed in the list.	Adjust the list view.

Step 4. Complete Date, Add Service, Author, Comment, and Case Note.



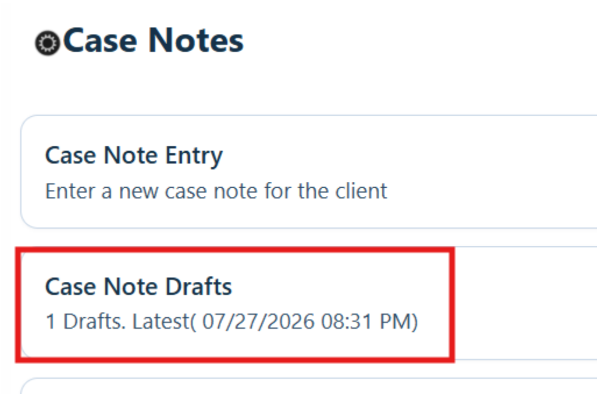
NOTE: Case note authors are maintained in Employee Setup. Selecting Add Service opens the client's Services tab after the case note is saved.

Step 5: Click Save.

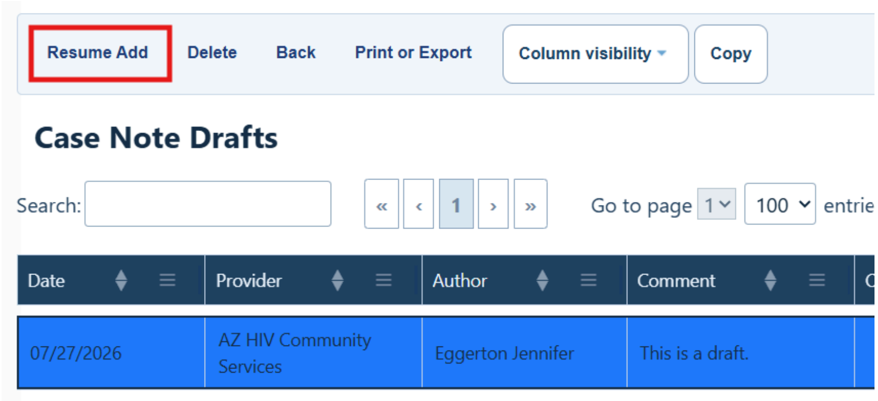


Work with case note drafts

Step 1. From the Case Notes menu, click Case Note Drafts.



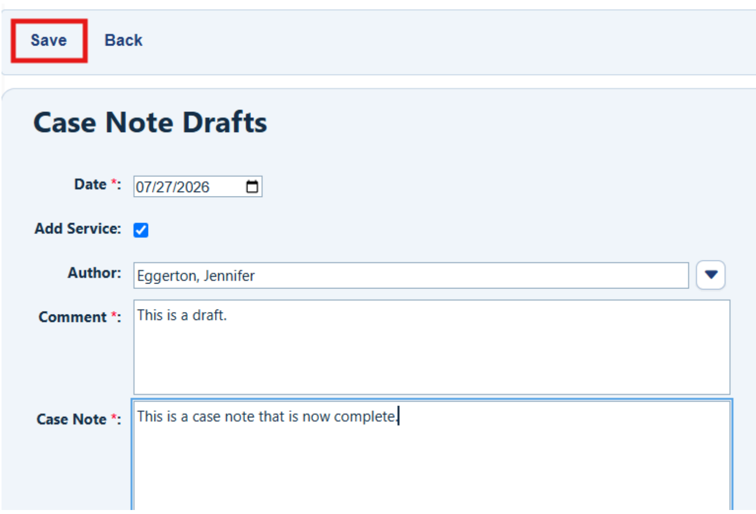
Step 2. Select the draft and click Resume Add.



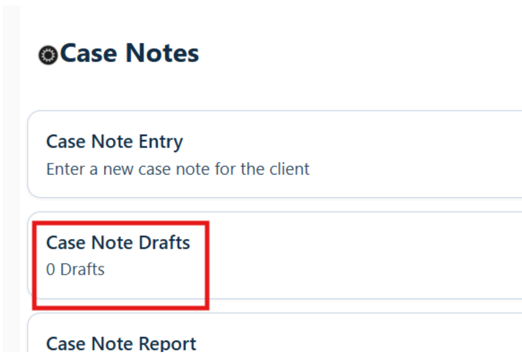
Case Note Draft buttons

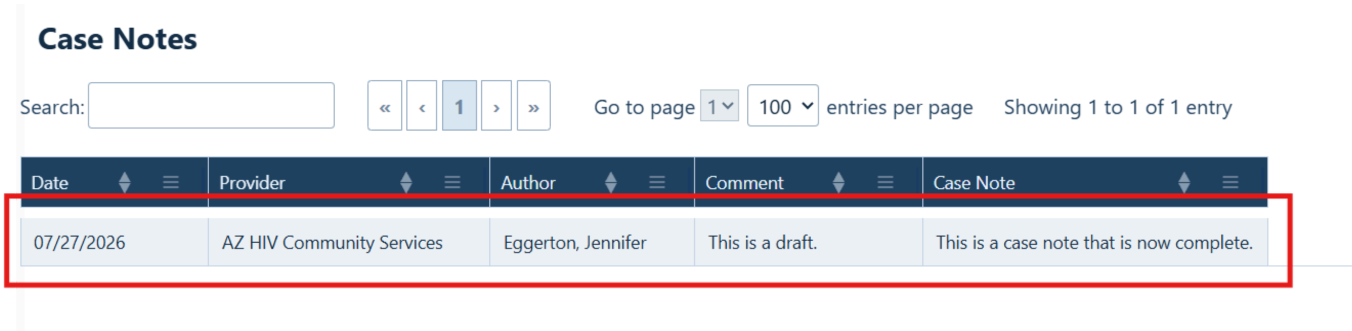
Item	What it does	When to use it
Resume Add	Opens the draft for completion.	Continue and save a draft note.
Delete	Deletes the selected draft.	Discard a draft that is no longer needed.
Back	Returns to the Case Notes menu.	Leave the drafts list.
Print or Export	Prints or exports the drafts list.	Produce a list for approved use.
Column Visibility	Controls columns displayed in the list.	Adjust the drafts view.

Step 2. Edit the draft as needed, then click Save.



The note is removed from drafts and saved in Case Note Entry.





How to confirm it worked

1. The saved note appears in Case Note Entry for the client.
2. A saved draft no longer appears in Case Note Drafts.
3. The report displays the expected date span and case note records.

Troubleshooting and common questions

Why is an author missing?

Ask an authorized administrator to verify the person is listed under Employee Setup and identified as a Case Note Author.

Why can’t I find my draft?

Confirm that you are in the same client record and signed in as the user who created the draft.

What happens when Add Service is selected?

After the case note is saved, CAREWare opens the client’s Services tab.

Related References

Document	Use it for
Employee Setup	Set up employees as case notes authors and other roles in CAREWare. Please note that Employee Setup is separate from managing user accounts.