Case Note Report

Purpose	Run and review a case note report for a specific client.
Who should do this	CAREWare users who are authorized to review client case notes.
Use this guide when you need to	Select a reporting period, choose the provider scope, and open or export the completed report.
Main warning	Case note reports contain sensitive client information. Confirm the correct client and use approved storage and sharing practices.

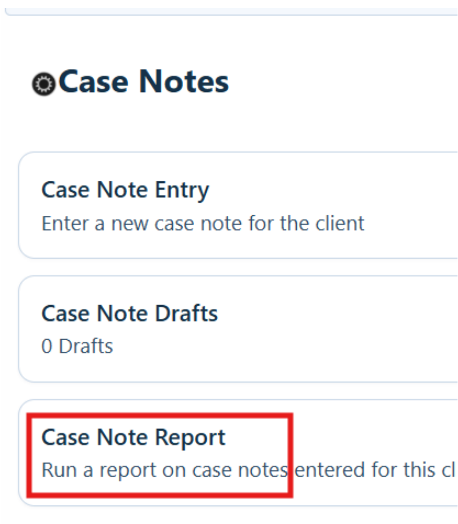
Quick path
Client record > Case Notes > Case Note Report > Run

Before you begin

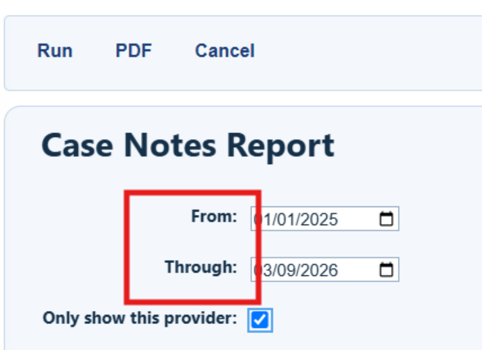
- Open the correct client record.
- Determine the date span needed for the report.
- Decide whether the report should include shared case notes from other provider domains.

Run a case note report

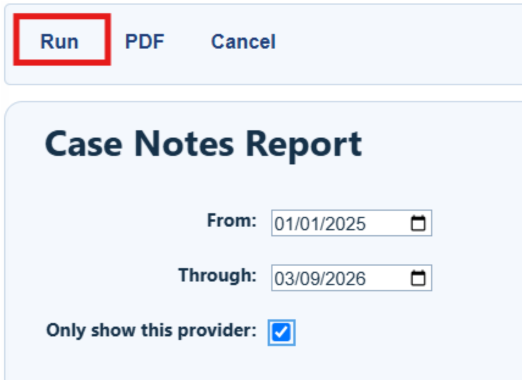
Step 1. From the Case Notes menu, click Case Note Report.



Step 2. Set the report date span. Select Only show this provider to limit results to the current domain; clear it to include case notes shared from other domains.



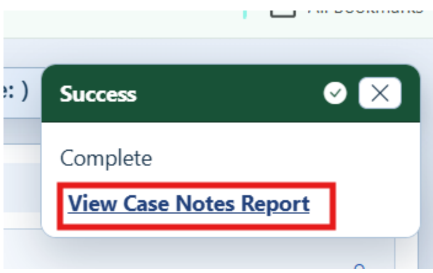
Step 3. Click Run.



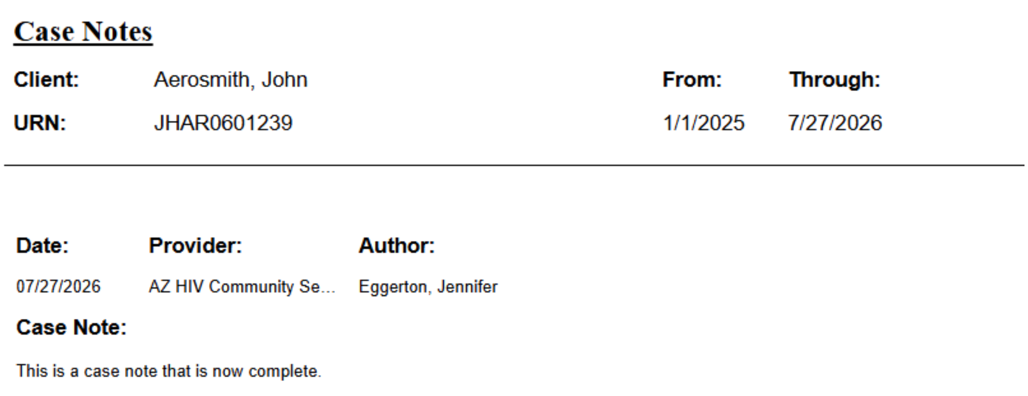
Case Note Report buttons

Item	What it does	When to use it
Run	Opens the report in a new browser tab.	View the report in CAREWare.
PDF	Opens the report in PDF format.	Save or print an approved copy.
Cancel	Returns to the Case Notes menu.	Leave the report setup screen.

Step 4. Click View Case Notes Report to open the completed report.



The report shows the client name, URN, date span, and case notes. Each note includes its date, provider domain, author, and text.


Case Notes

Client:	Aerosmith, John	**From:**	**Through:**
URN:	JHAR0601239	1/1/2025	7/27/2026

Date:	**Provider:**	**Author:**
07/27/2026	AZ HIV Community Se...	Eggerton, Jennifer

Case Note:

This is a case note that is now complete.

How to confirm it worked

1. The report opens for the correct client.
2. The report header shows the expected date span.
3. The report contains the expected case note records and provider domains.

Troubleshooting and common questions

Why are no case notes listed?

Confirm the report date span and verify that case notes exist for the client during that period.

Why are notes from other domains missing?

Clear Only show this provider and confirm that the applicable domains share case notes.

Why does the report show the wrong client or date span?

Close the report, return to the correct client record, and run it again with the intended dates.

Related References

Document	Use it for
Case Notes	Add and edit case notes in client records.