

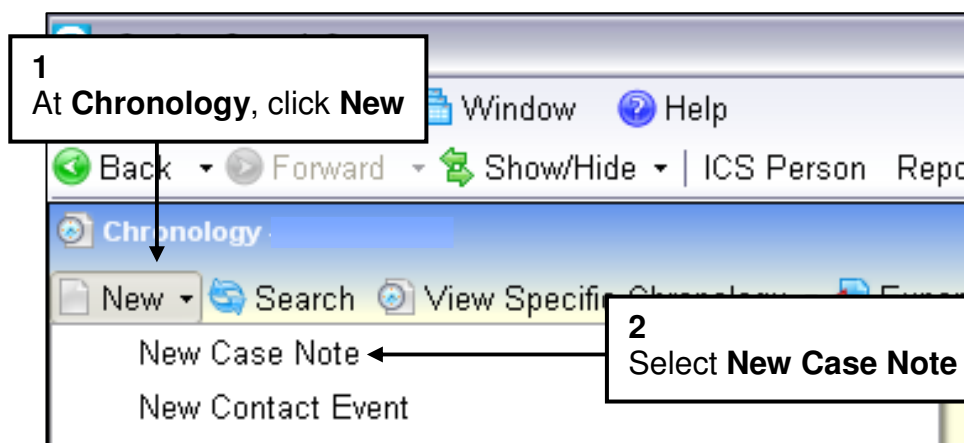
Recording a Case Note

The **Case Note** is used to record day-to-day activities on a child/young person's case. Prior to ICS these were known as running records.

The **Case Note** will record a specific event or activity relating to the same specific event in a single Case Note or a series of events as in a 'running record'.

Everyone involved with the child must record their activity in a separate Case Note.

Create a New Case Note



The following will be displayed:

The screenshot shows the 'New/Edit Case Note' form. The form is divided into two main sections: '1. Subject Details' and '2. Case Note'. The 'Subject Details' section includes fields for Title, Family Name (Ball), Given Name (Emily), and Gender (Female). The 'Case Note' section includes fields for Case Reference Number (2010Data043700 - Open), Event Type (Home Visit), Date (01/12/2010), and Time (16:28). There are also buttons for Save, Set ACL, and a navigation bar with tabs for 1. Subject Details, 2. Case Note, 3. Sign Off, and 4. Cloned Details.

Numbered callouts indicate the following steps:

- 3 Select CRN**: Points to the Case Reference Number dropdown menu.
- 4 Select Event Type from drop down list**: Points to the Event Type dropdown menu.
- 5 Select the Date of the event – this will place the Case Note in the correct position in the Chronology**: Points to the Date dropdown menu.
- 6 Add Time - use a colon to separate hours and minutes**: Points to the Time input field.

2. Case Note

Case Reference Number: 2010Data043700 - Open

Event Type: Home Visit

Date: 01/12/2010 Time: []

People Present: Fiona Gilbert, Mrs Ball and Emily Ball

Case Note Summary: []

7
Add **People Present** and the name of the person recording the detail - this is important as the name will appear in the **Case Note Report**

Important – leave **Case Note Summary** blank – this will automatically populate from the **Case Note Detail** when the **Case Note** is saved

8
Click the **Memo** button to expand the field

Memo

Capita One 4.0

Focus Tools Window Help

Back Forward Show/Hide

Memo Details

New/Edit Case Note []

Save Set ACL

1. Subject Details 2. Case Note 3

Number: []

Event Type: Home Visit

Date: 01/12/2010

People Present: Fiona Gilbert, Mrs

Case Note Summary: []

Case Note Detail: []

150 characters or **text up to the first full stop** will show as the **Case Note Summary** when the **Case Note** is saved

9
Record **Case Note Detail** – type information directly in to this memo field, maximum 31,000 characters, use **Spell check** before **Save**

10
Click **OK** – this will collapse the memo field

Home visit to discuss issues at school. The home visit had been arranged following concerns raised by the school that Emily is not attending on a regular basis.

New/Edit Case Note []

Save Set ACL

← Only **two** buttons are displayed **before** the **Case Note** is saved

1. Subject Details 2. Case Note 3. Sign Off 4. Cloned Details

Number

Home Visit

01/12/2010 Time 16:28

People Present
Fiona Gilbert, Mrs Ball anmd Emily Ball

Case Note Summary

Case Note Detail
Home visit to discuss issues at school. The home visit had been arranged following concerns raised by the school that Emily is not attending on a regular basis.

11 Click Save

New/Edit Case Note [Home visit to discuss issues at school.]

Save Workflow Set ACL Clone Delete Export/Print

← When a **Case Note** is saved, other buttons are displayed

1. Subject Details 2. Case Note 3. Sign Off 4. Cloned Details

1. Subject Details

Title

Family No

Given Name Emily

Gender Female

Click **Clone** to **copy** the **Case Note** to siblings

Click **Export/Print** to create a document in Word that can be printed

Click **Delete** to remove the **Case Note** from the **Chronology**

2. Case Note

Case Reference Number 2010Data043700 - Open

Event Type Home Visit

Date 01/12/2010 Time 16:28

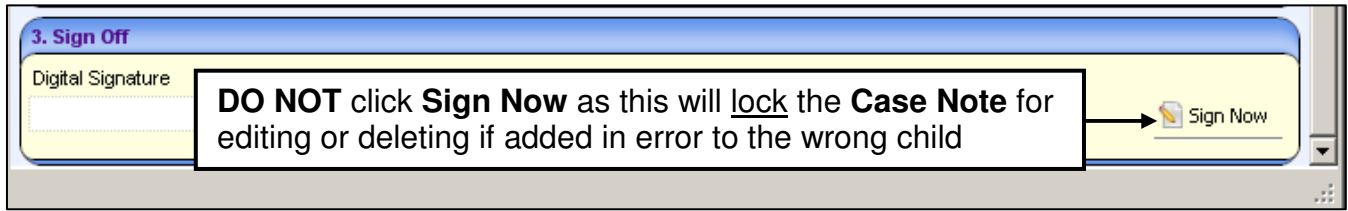
People Present
Fiona Gilbert, Mrs Ball anmd Emily Ball

Case Note Summary
Home visit to discuss issues at school.

Case Note Detail
Home visit to discuss issues at school. The home visit had been arranged following concerns raised by the school that Emily is not attending on a regular basis.

Case Note saved successfully

→ When this message is displayed the **Case Note** has **saved**



1. The **Case Note** can be edited/updated and saved
2. When the **Case Note** is **Saved** - an option to **Workflow** the **Case Note** is available
3. Check the **Case Note** has saved successfully before **closing** the **Case Note**
4. Only text in the **Case Note Summary** is visible in the **Chronology**
5. Text add to the **Case Note Summary** is not visible in the **Case Note Report** so repeat this detail in the **Case Note Detail**
6. Always add the name and job title of the person recording the Case Note in the **People Present** field as this detail will show in the **Case Note Report**
7. Record the **Case Note Summary** headline followed by a full stop as part of the **Case Note Detail** – when the **Case Note** is saved, the headline will automatically populate the **Case Note Summary** field
8. **Case Notes** can be cloned to siblings – see User Guide on Kent Trust Web – **Cloning a Case Note**
9. A single **Case Note** can be printed using the **Export/Print** button
10. Multiple Case Notes can be printed by running the **Case Note Report** – see User Guide on Kent Trust Web – **How to produce reports from Capita One**