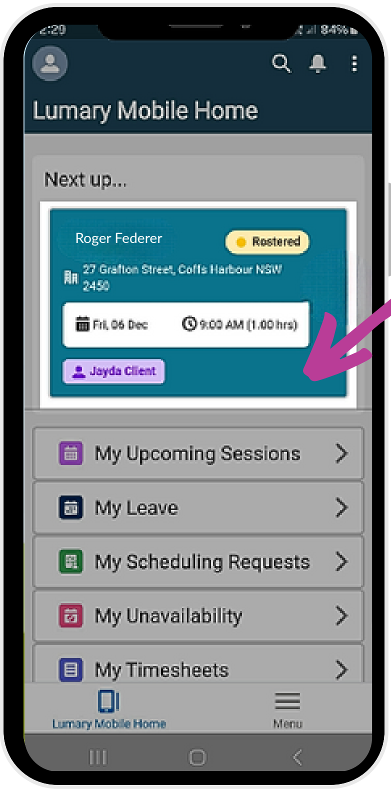
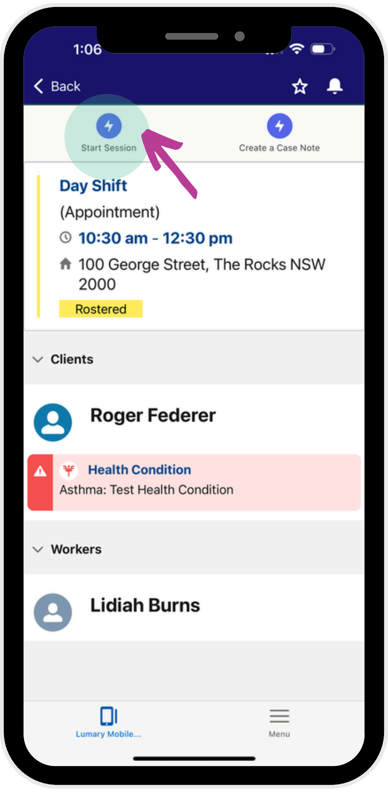
How to enter Case Notes

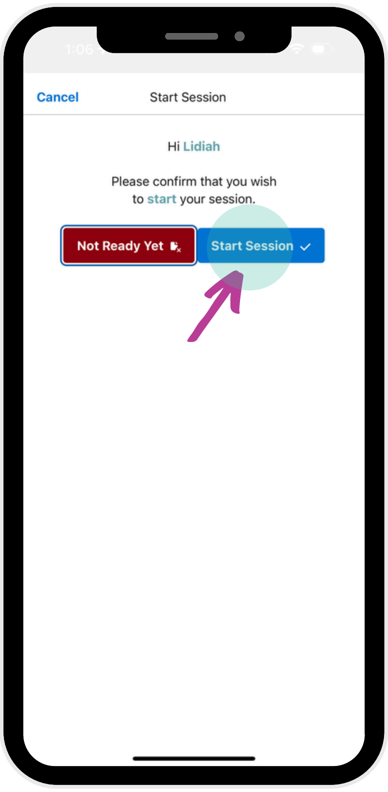
1. From the home screen, click on the **session tile** to view the details of that shift to start the shift.

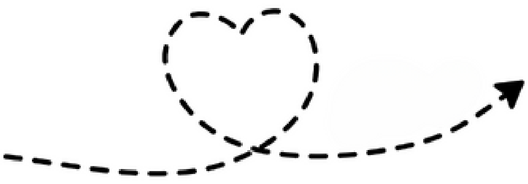


2. Click **Start Session** when you're ready to start your shift with the participant



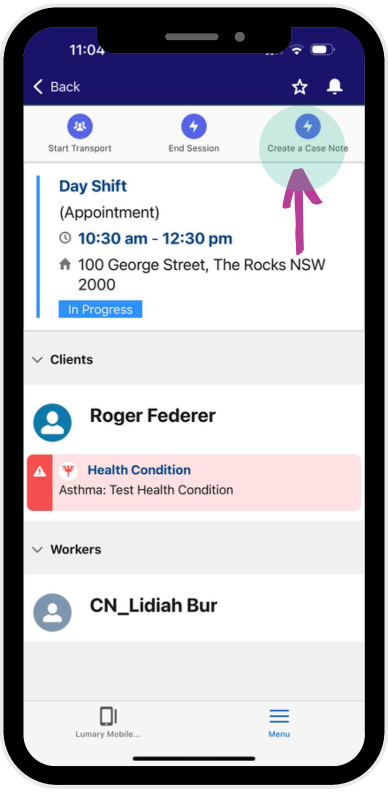
3. Click **Start Session**



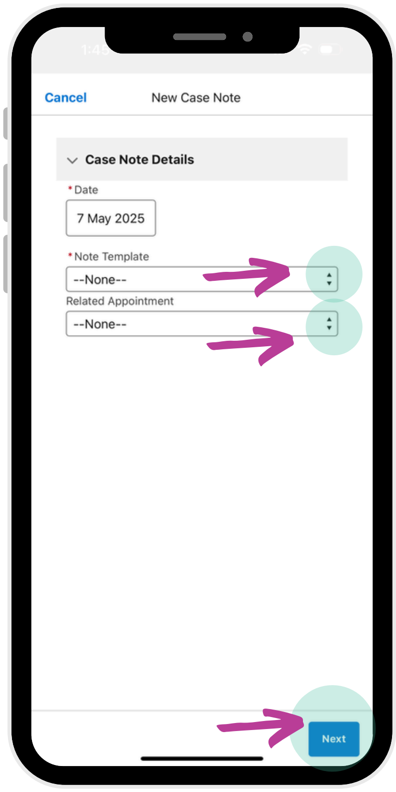


Complete your shift with Participant

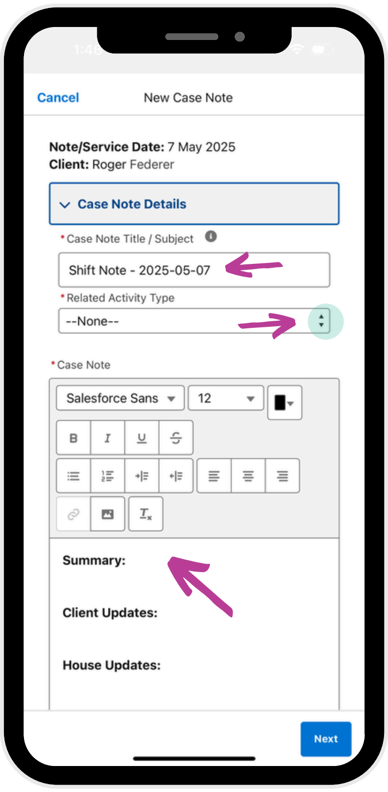
4. Before ending session (or afterwards if you forgot), click on **Create a Case Note**



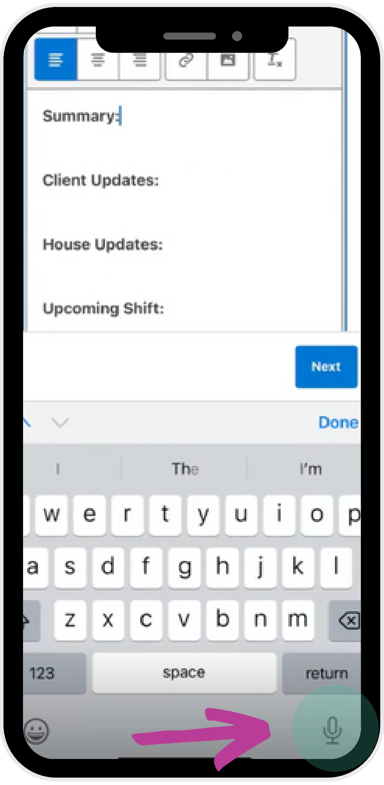
5. From the drop down box choose **Shift Note** and choose the **Related Appointment** for your Case Note. Press **Next.**



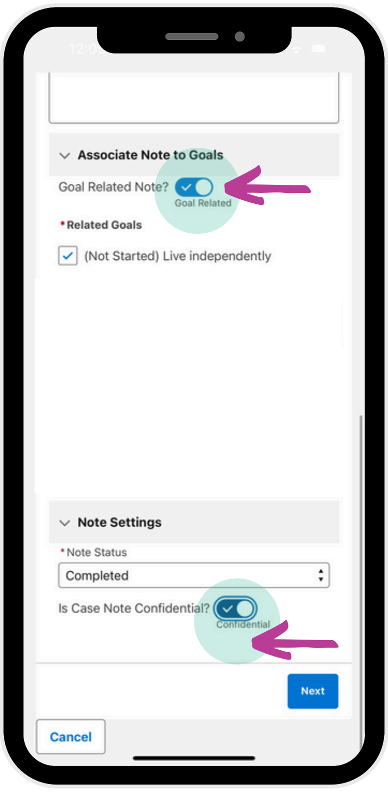
6. Enter all the relevant information of what occurred



TIP: Use your microphone on your phone keyboard to enter case notes through voice to text



7. You can include **Notes to Goals**, and **Confidential Status** here. Then press **Next**



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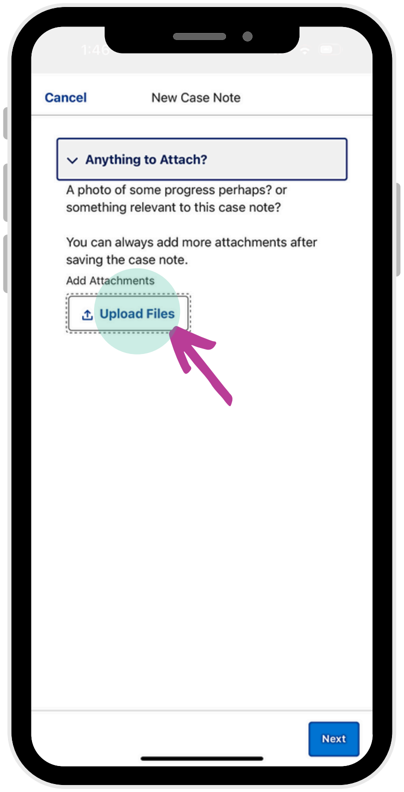
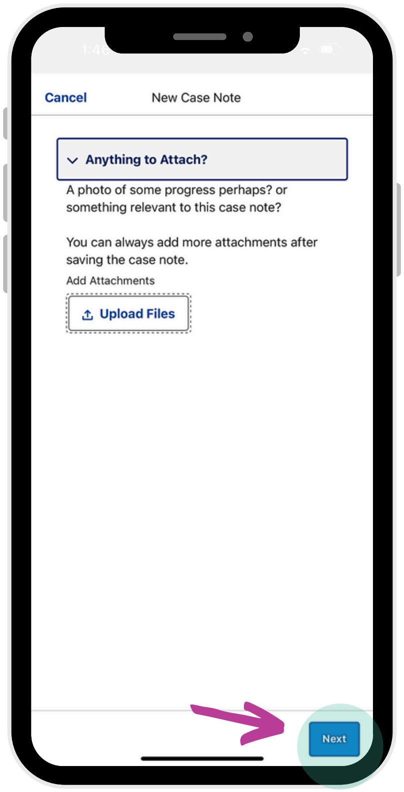
HEALTHCARE

How to enter Case Notes

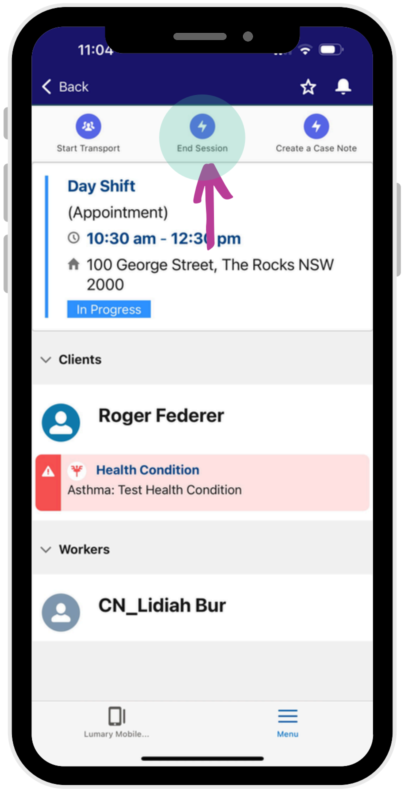
8. If you want to upload a photo or attach anything do so by clicking **Upload Files**



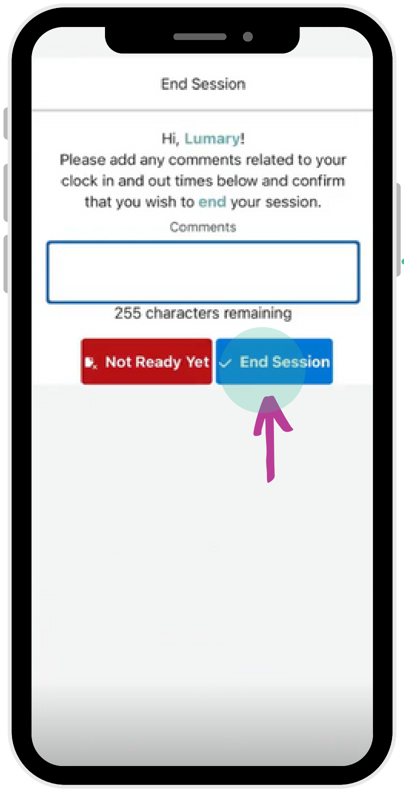
9. Press **Next**



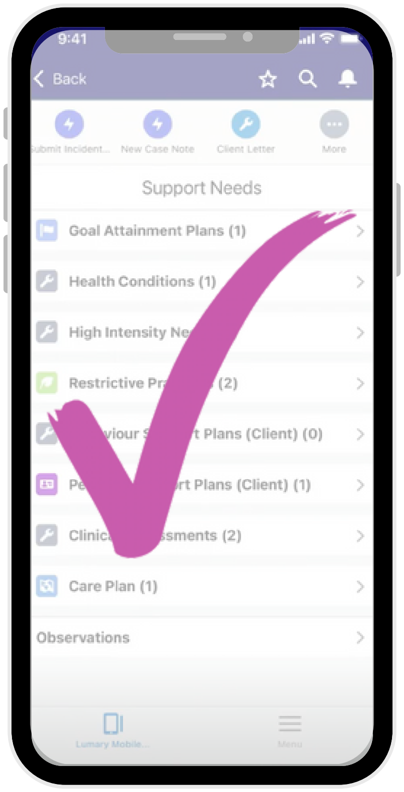
10. Once Case Notes are complete, click **End Session** when the session has finished.



11. Add in any relevant comments and click **End Session** when your shift has finished.



12. You're all finished!



TIP

If you forget to enter your Case Note during your shift, complete the following:

> From your Home Page, select **My Upcoming Sessions.**

> From the dropdown box under **Completed**, find the relevant shift.

> Press **Create a Case Note** and follow the prompts.