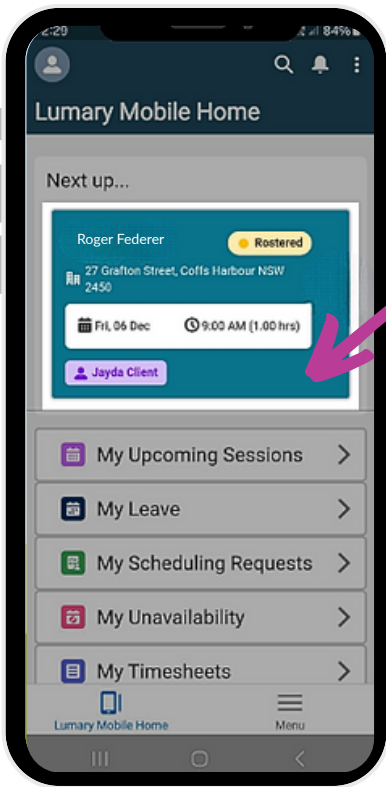


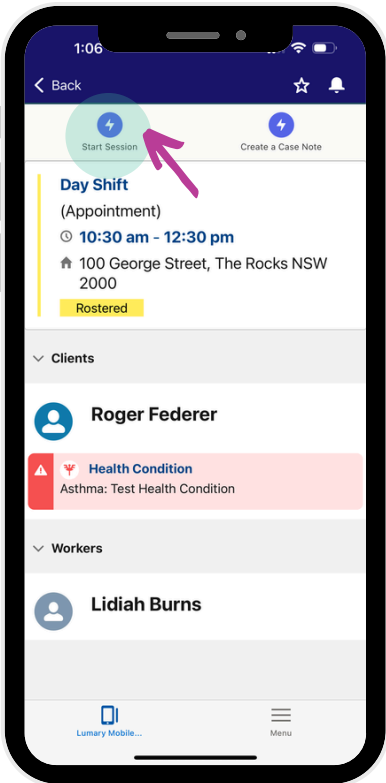
# How to enter Case Notes

(How to view previous Case Notes on Page 3)

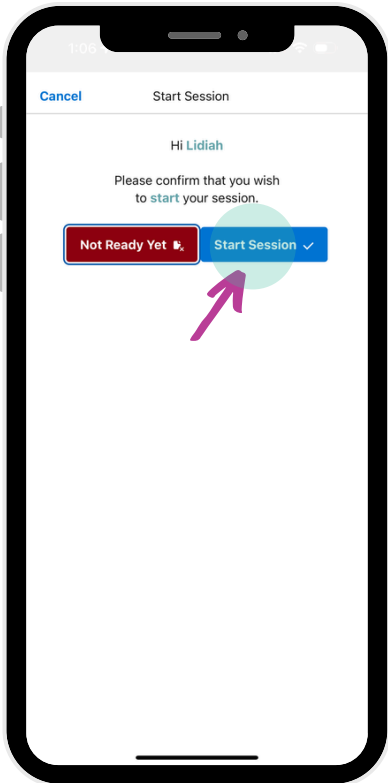
1. From the home screen, click on the **session tile** to view the details of that shift to start the shift.



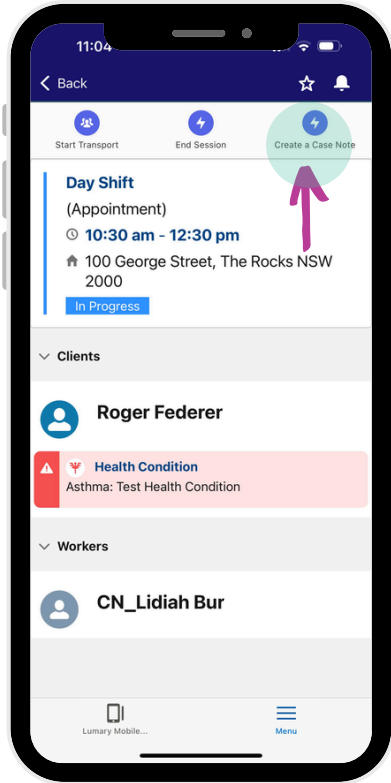
2. Click **Start Session** when you're ready to start your shift with the participant



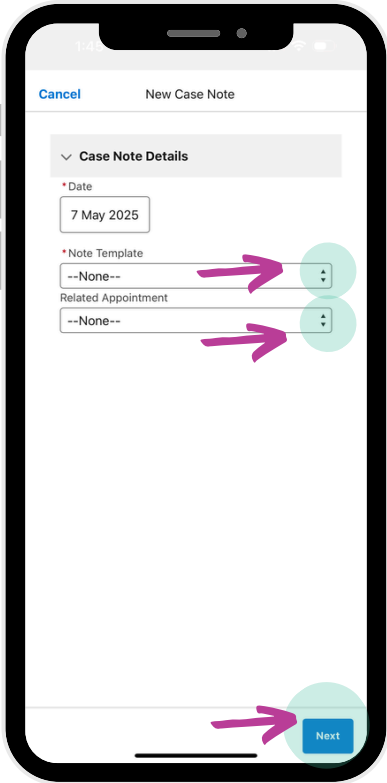
3. Click **Start Session**



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**.

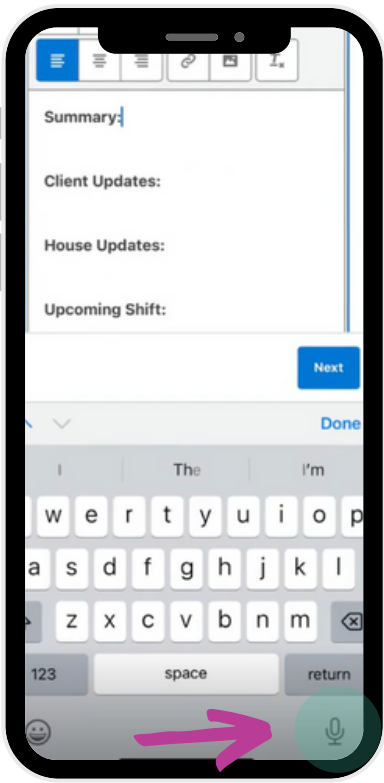


Complete your shift with Participant

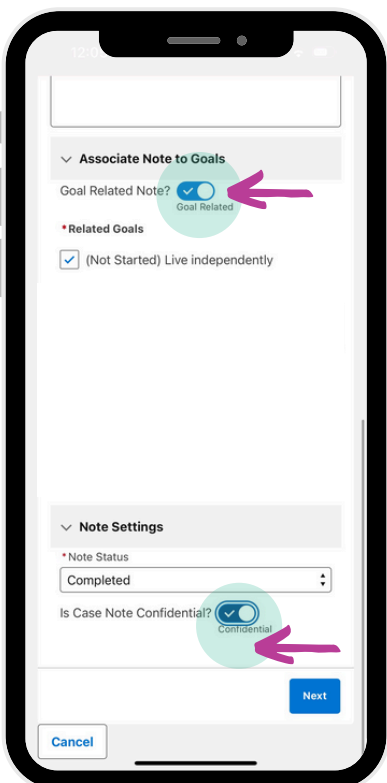
6. Enter all the relevant information of what occurred



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

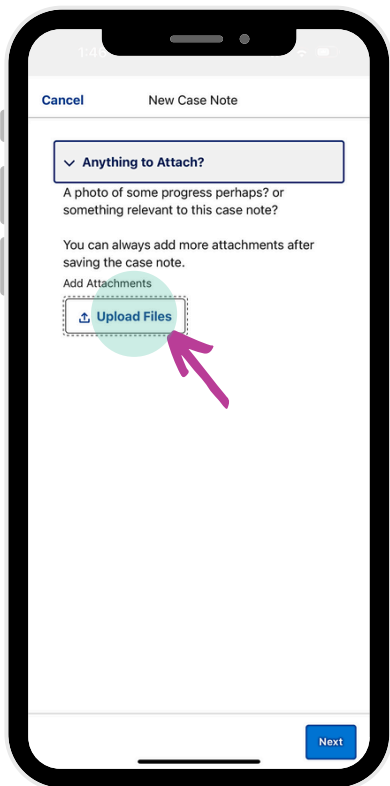


7. You can include **Notes to Goals**, and **Confidential Status** here. Then press **Next**

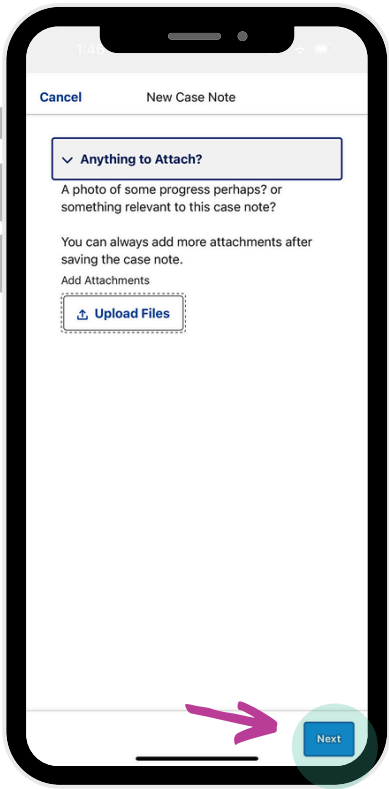


# How to enter Case Notes

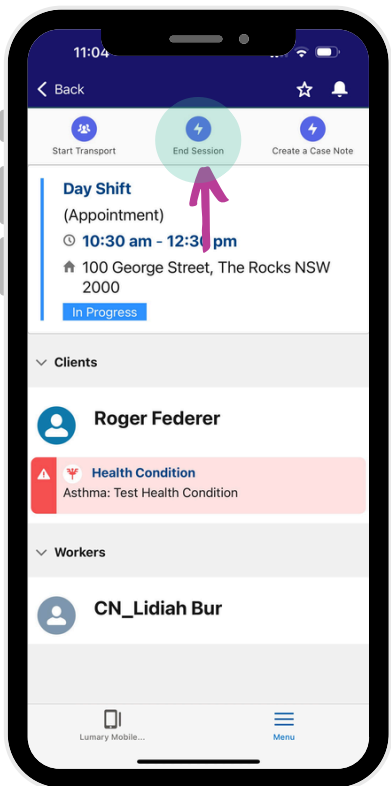
8. If you want to upload a photo or attach anything do so by clicking **Upload Files**



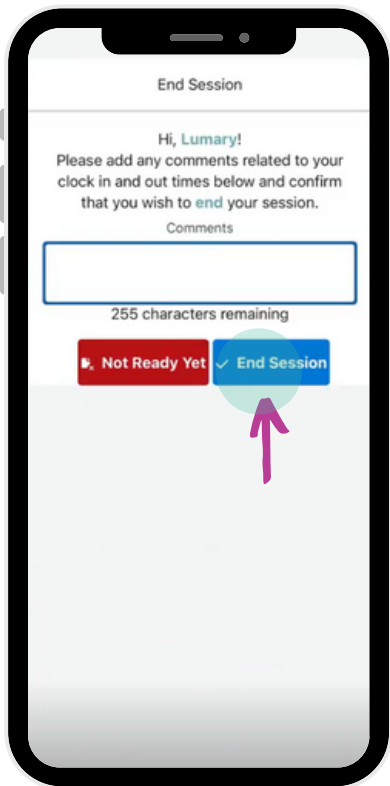
9. Press **Next**



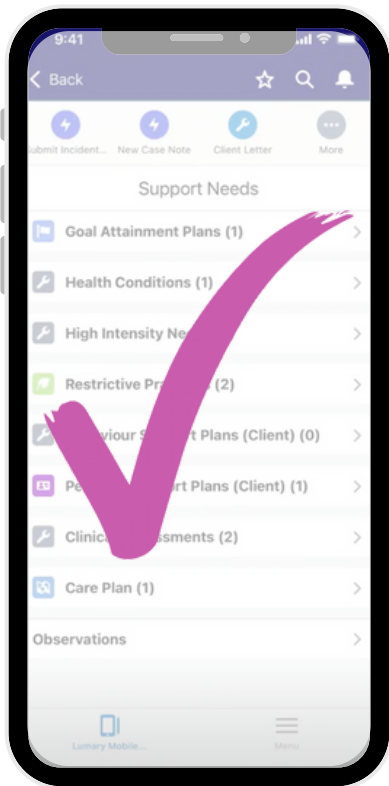
10. Once Case Notes are complete, click **End Session** when the session has finished.



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



12. You're all finished!

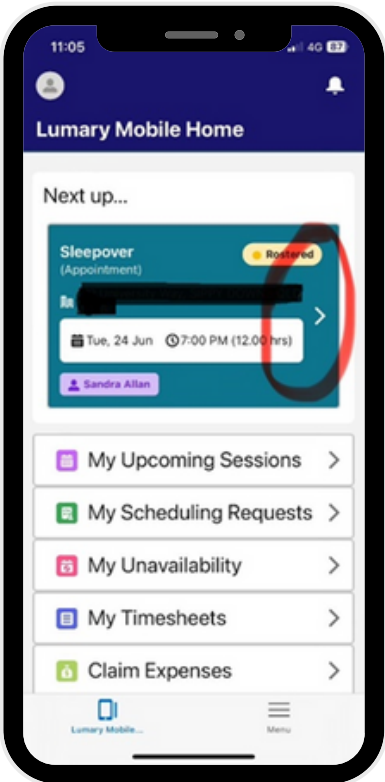


## TIP

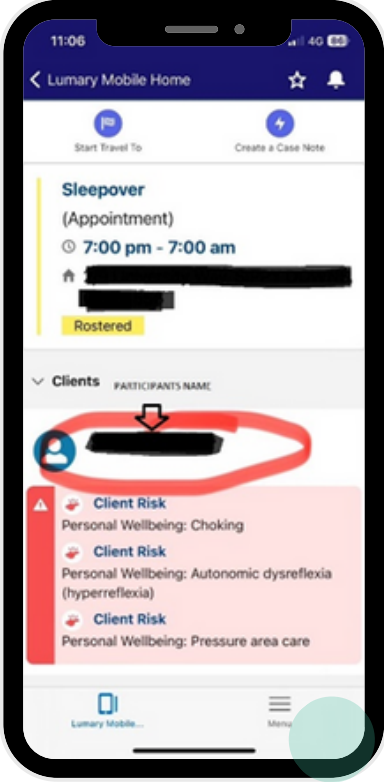
- If you forget to enter your Case Note during your shift, complete the following:
- > From your Home Page, select **My Upcoming Sessions**.
  - > From the dropdown box under **Completed**, find the relevant shift.
  - > Press **Create a Case Note** and follow the prompts.

# How to view previous Case Notes

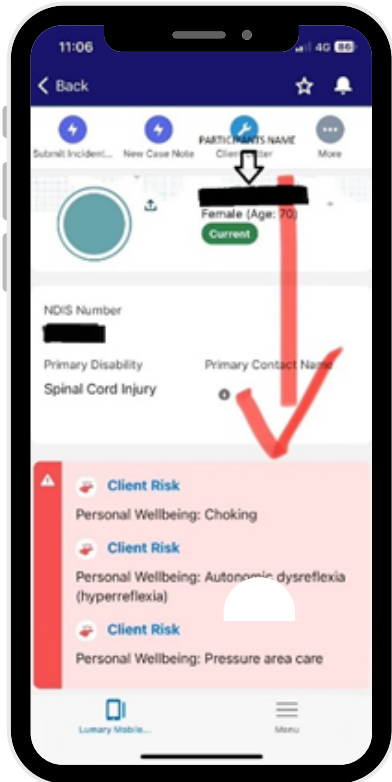
1. Open the Lumary app and select your next session.



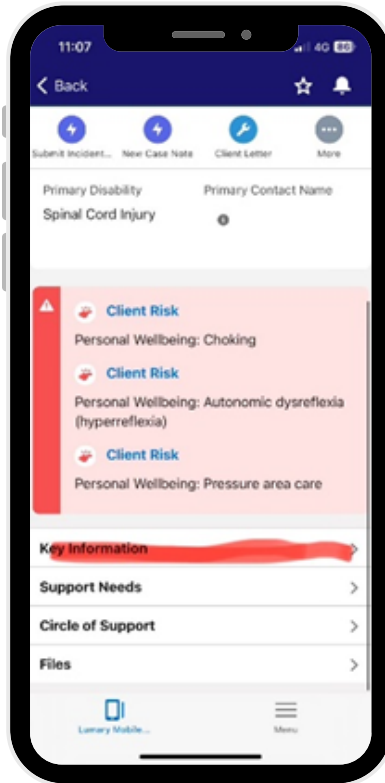
2. Select the relevant participants name.



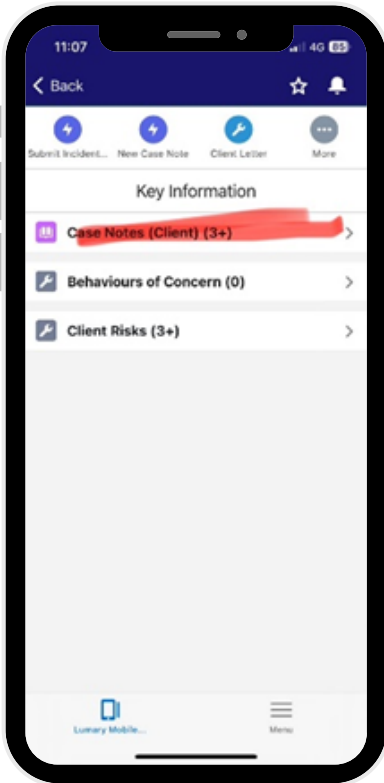
3. Scroll down the participants page until you see the “Key Information” tab



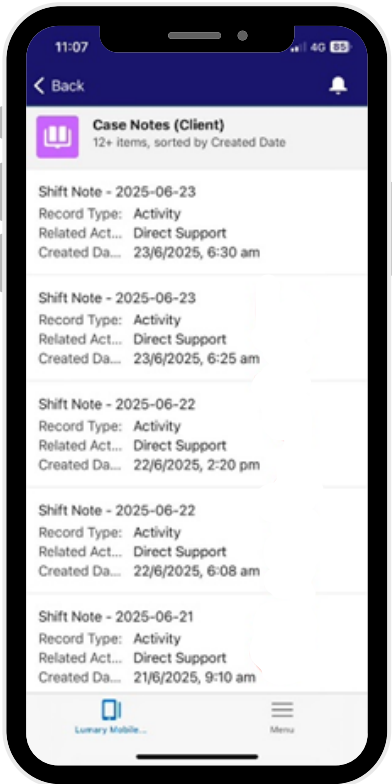
4. Select ‘Key Information’



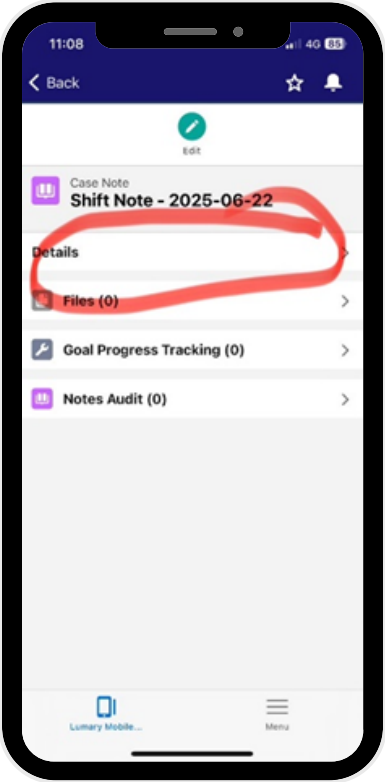
5. Once in the “Key Information” tab you will see the “Case Notes (Client)” tab, select this tab.



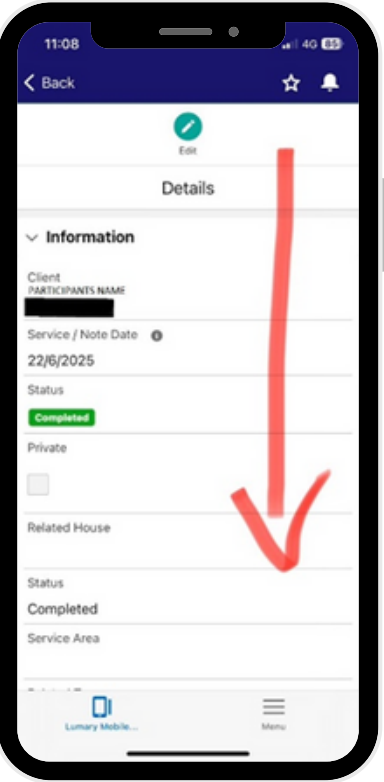
6. You will see the previous shifts case notes, select the required case note.



7. Once in the desired case note select the “Details” tab



8. Scroll down and the case note will be visible



9. View case notes.

