CoActiveSoft Case and Client Notes

Case and Client Notes Overview

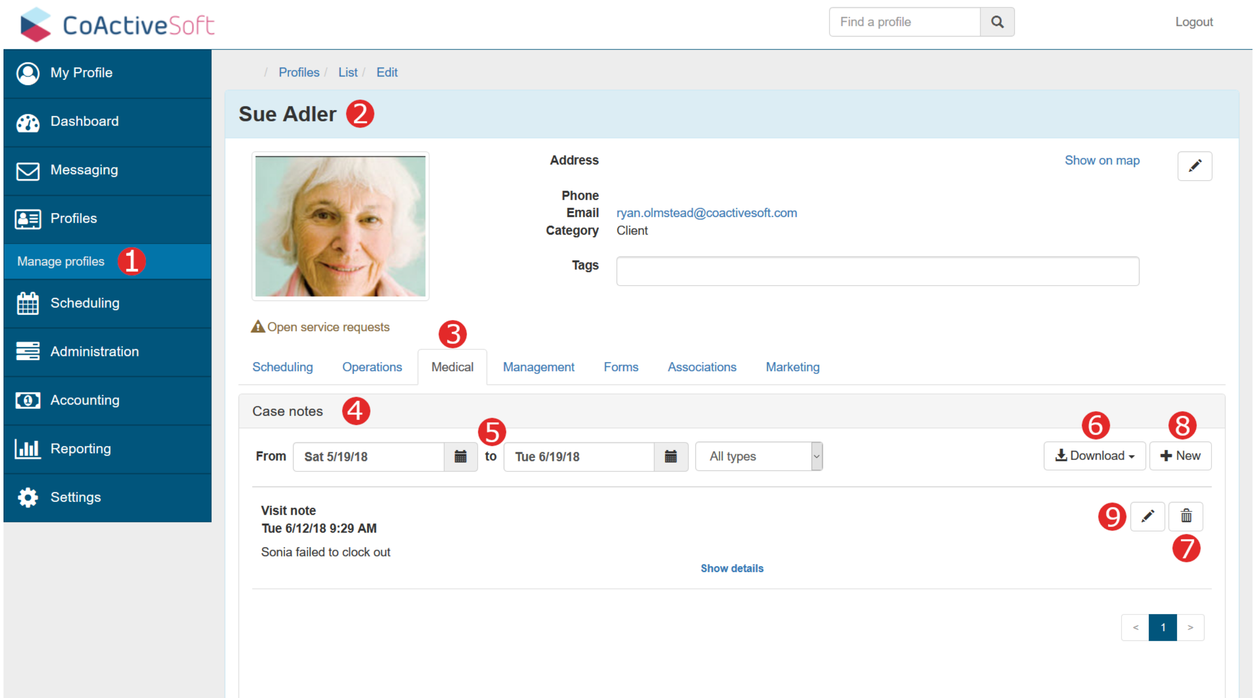
In CoActiveSoft, both case and client notes are used to document information relating to a client, caregiver, or the services provided.

Case notes are created by the caregiver or agent in a client profile. These notes are not available for the client to view. Case notes may include useful information about the client that does not directly apply to a given field, specific notes on care plans and what the client does or does not like, specific information about specific visits, etc. It is up to you what is included in case notes, because they are free-form.

Client notes are also created by the caregiver or agent in a client profile. Client notes are viewed but not edited by the client. Free-form client notes are worthwhile to have for information that does not fit a specific field and/or would be useful to share with the client.

Creating and Editing Case Notes

The case notes section is located under the 'Medical' tab (3) of a client's profile (1, 2):



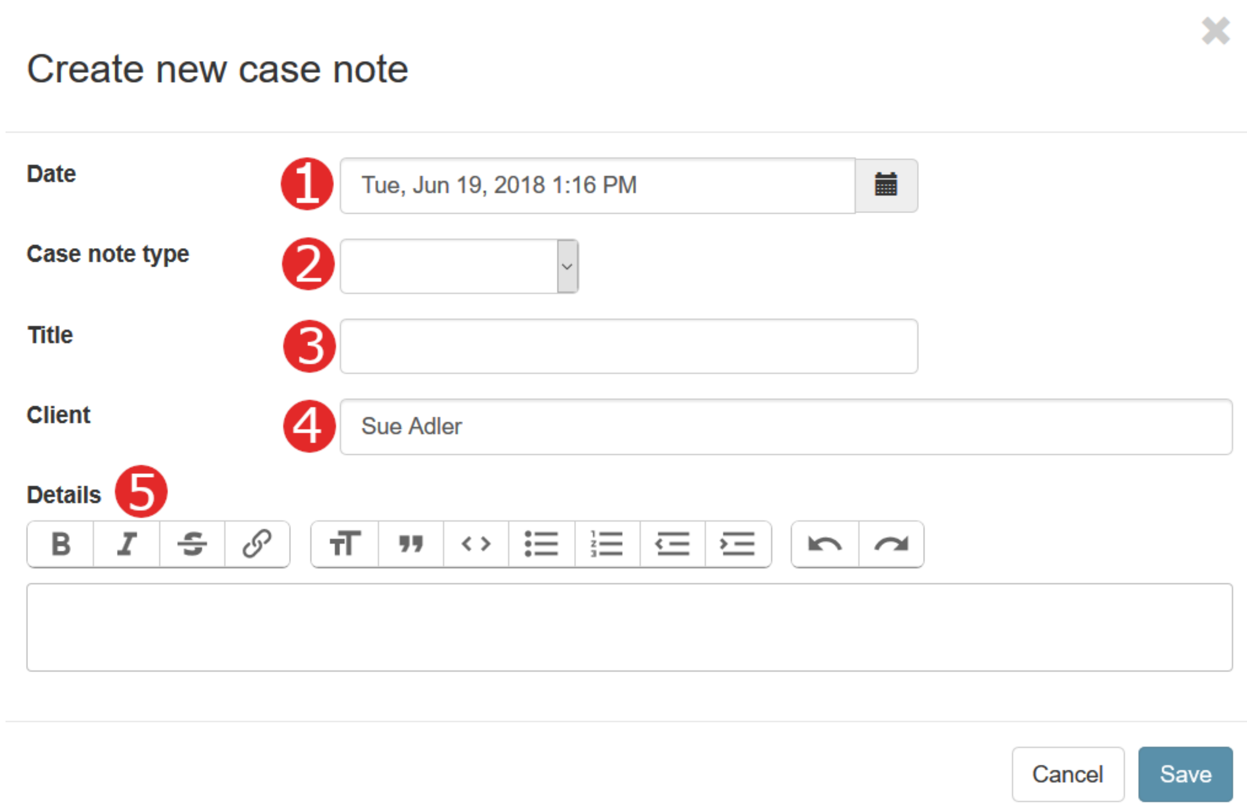
As you can see, the 'Case notes' section is located under 'Manage profiles' → 'Client profile' → 'Medical' tab → 'Case notes'. If you are lost at this point, please consult the CoActiveSoft Profile Management user manual.

At this point, previous case notes are shown (4). If you would like to only see case notes from a range of dates, use the date fields (5) to narrow down your search. It is also possible to sort by the type of case note. The types of case note include 'Visit note', 'Condition report', and 'Fall report'. The case note type can be specified when creating (8) or editing (9) a note.

It's also possible to download a note as a PDF (6). CoActiveSoft will automatically format the document.

Delete specific case notes by clicking the delete button (7).

Whether you edit (9) or create a new post (8), you will be brought to a similar place:



By default, the date for the case note (1) is set to the current time that the note is being created. This can be modified to be any date.

The case note type (2) can either be left blank or designated as a ‘Visit note’, ‘Condition report’, or ‘Fall report’.

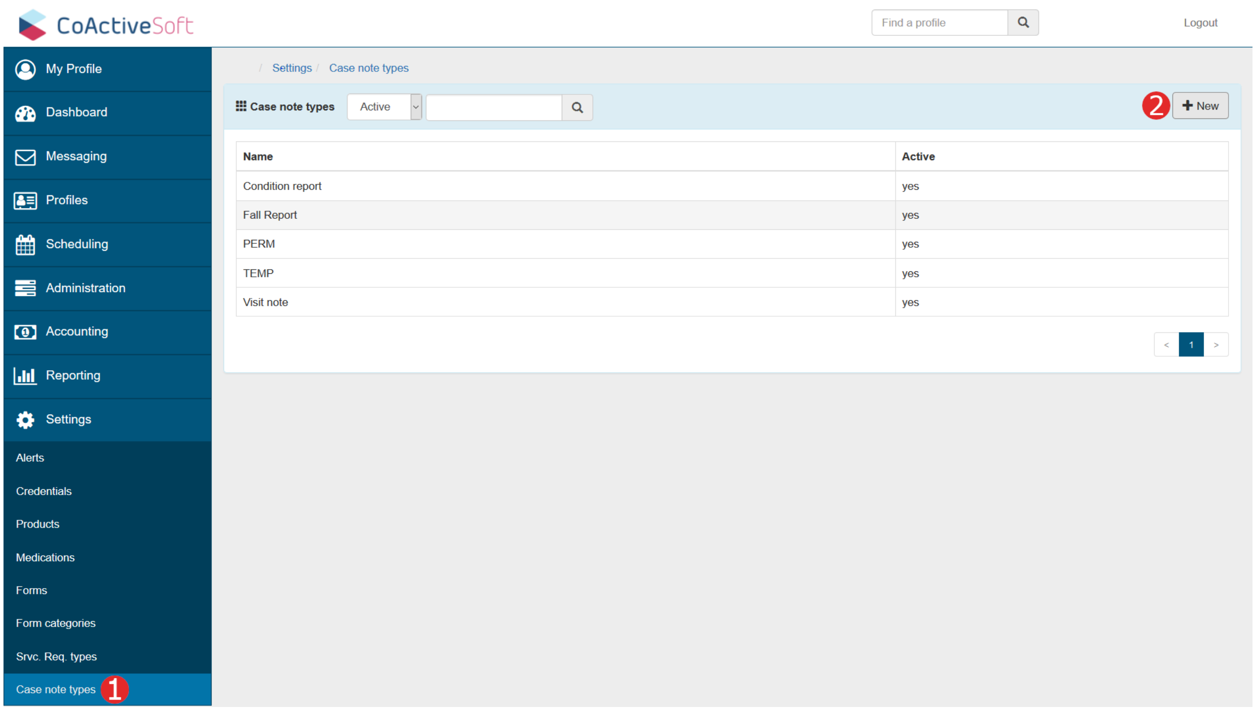
Next, the title of the case note (3) is defined in the ‘Title’ field. A title is not required but it may be useful to briefly explain what the note is about.

In the ‘Client’ field (4), the client that this note applies to is recorded. Even though you access the case note section in a specific client profile, this case note can be written for any client and will show up in their respective profile.

Finally, the details field (5) is where you input the text of the note. It is possible to format the text extensively in this section, as described in the final section of this manual.

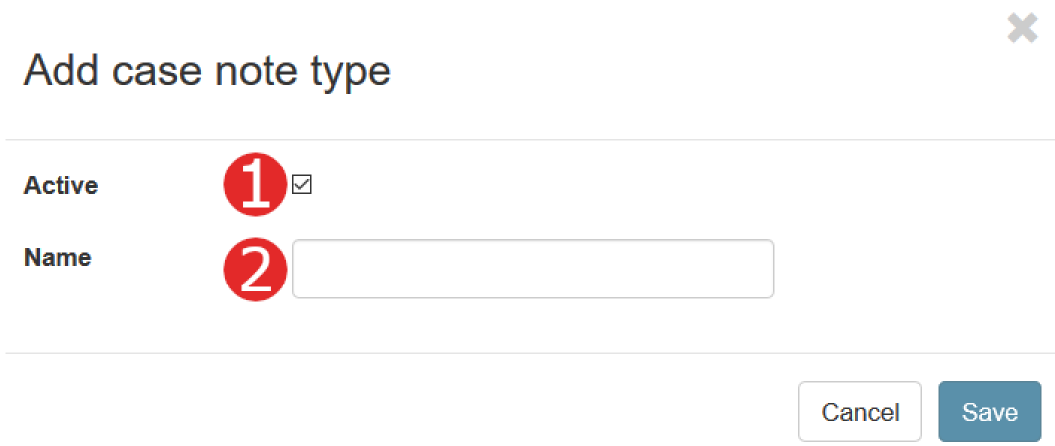
Customizing Types of Case Notes

You must be logged in as an admin or supervisor to customize case note types.
To customize the types of case notes, navigate to the main menu → ‘Settings’ → ‘Case note types’ (1):



Creating A New Case Note Type

Once you click on the New button in the top right (2), you will be presented with an ‘Add case note type’ window:



1 – Active

This check box determines whether or not the case note type is visible to users creating a new case note.

2 – Name

Fill out this field with the name of the case note type that you would like users to see while creating a new case note.

Editing An Existing Case Note Type

To edit an existing case note type, you must be an admin or supervisor.
First, go back to the main page (first image of this section), and click on whichever case note type you want to edit. Next, click on the edit button ( ) in the top right. Refer to the previous image and explanations below it to customize the case note type.

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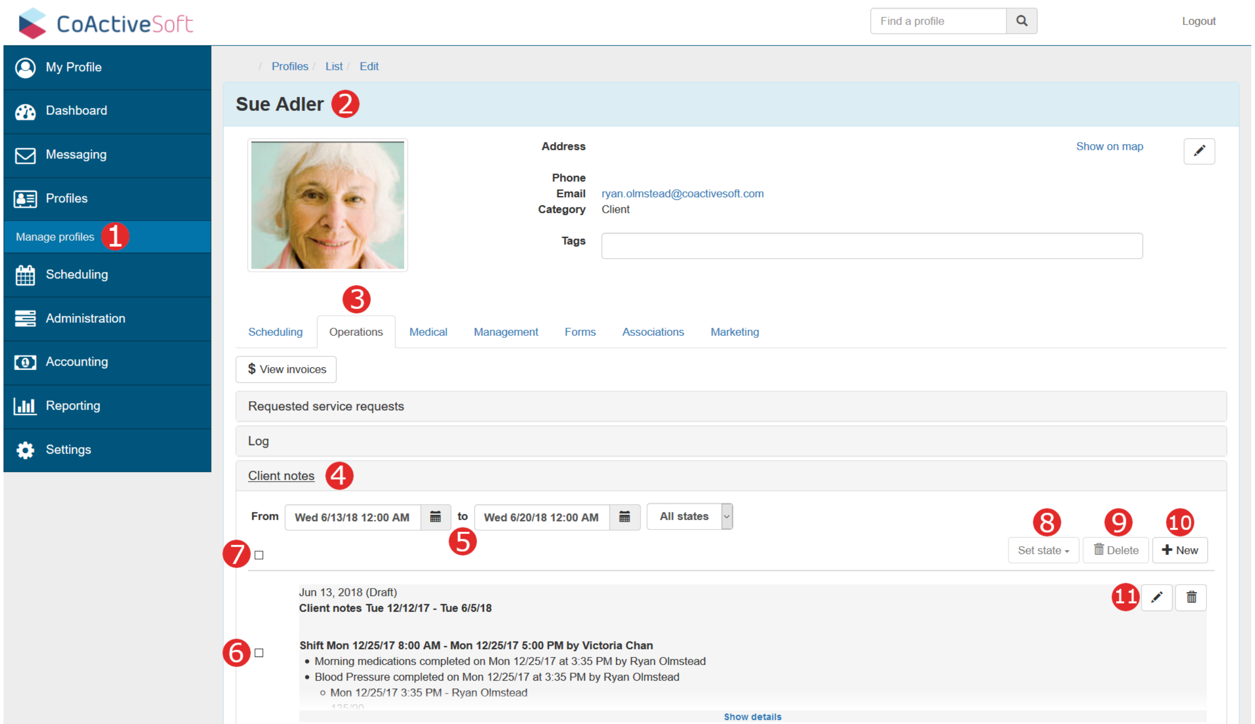
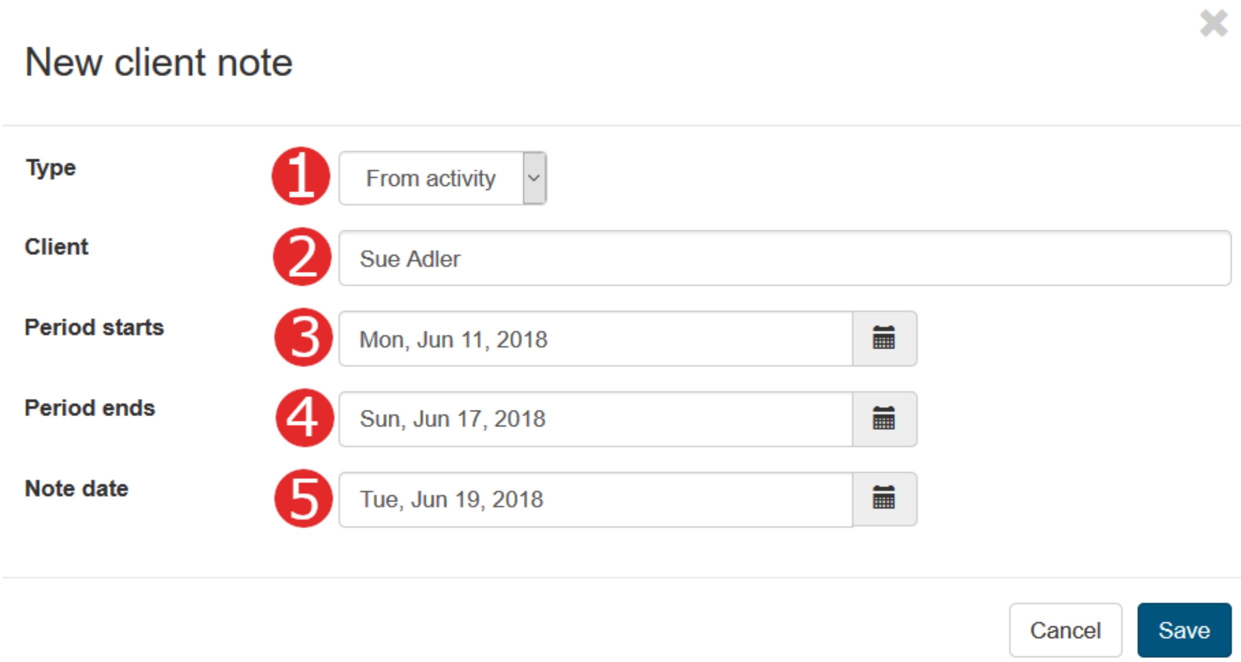
Creating and Editing Client Notes

The client notes section is located under the 'Operations' (3) tab of a client's profile (1, 2):



As you can see, the 'Client notes' section is located under 'Manage profiles' → 'Client profile' → 'Operations' tab → 'Case notes'. If you are lost at this point, please consult the CoActiveSoft Profile Management user manual.
Here, previous client notes are shown (4). If you would like to only see client notes from a range of dates, use the date fields (5) to narrow down your search. It is also possible to search by state of the note. The state is either a 'Draft', where it is only viewed by agents and caregivers, or 'Validated', where the client can see the note as well. Change the state of the note by selecting one (6), multiple (6), or all (7) notes and setting the state (8). It is also possible to delete notes with this method using the delete button (9) or the delete button to the right of the note.
Using the new (10) or edit (11) button, you will be presented with the following screen:



The special thing about client notes when compared to case notes is the fact that the type (1) of note for client notes changes how the note is created. If the type is 'From activity', CoActiveSoft will create a formatted note from all the shifts, tasks, and information between the start (3) and end (4) dates:

Shift Mon 12/25/17 8:00 AM - Mon 12/25/17 5:00 PM by Victoria Chan

- Morning medications completed on Mon 12/25/17 at 3:35 PM by Ryan Olmstead
- Blood Pressure completed on Mon 12/25/17 at 3:35 PM by Ryan Olmstead
  - Mon 12/25/17 3:35 PM - Ryan Olmstead
    135/90
- Walk dog completed on Mon 12/25/17 at 3:36 PM by Ryan Olmstead

Morning medications completed on Tue 12/26/17 at 7:26 AM by Victoria Chan

Blood Pressure completed on Tue 12/26/17 at 7:26 AM by Victoria Chan

- Wed 12/27/17 7:26 AM - Ryan Olmstead
  130/90

Blood Pressure completed on Thu 12/28/17 at 11:04 AM by Ryan Olmstead

- Thu 12/28/17 11:05 AM - Ryan Olmstead
  130/90

If you change the client note type (1) to ‘Free form’, it will appear very similar to the case notes, the main difference being the ‘State’ field which was described earlier in this section:

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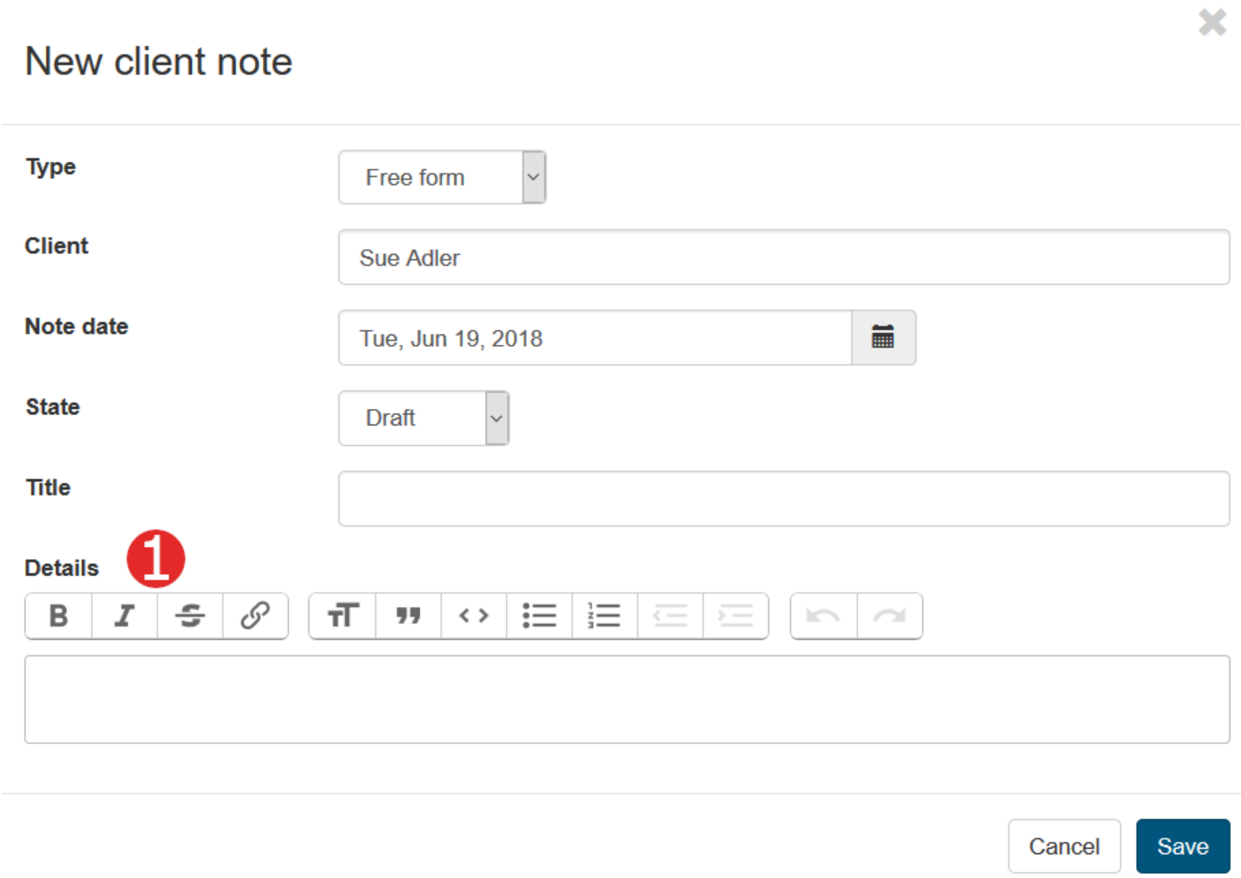

Feel free to add to the details section (1) with formatted text, as described in the next section.

Formatting Text Inside of Free-Form Notes

Formatting text inside of the notes and other sections of CoActiveSoft is very useful. In the following image, the corresponding button is shown on the left with the display of how the text looks on the right:

This is Bold Text

This is italicized text

~~This text is formatted with strike-through~~

This is a link! Edit a link by highlighting text and clicking the icon

This is big text

> Here is a quotation of something someone said

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<p> This is a section for code </p>
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- Bulleted list part 1
- Bulleted list part 2

1. Numbered list part 1
2. Numbered list part 2

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