Care Notes - Web Portal

Description: In this topic, the user will learn how to complete care notes with goal tracking from the employee profile in the web portal. This topic will also review how to view completed care notes, view and edit pending care notes, and how to publish care notes after clocking out of the shift. Care notes will only be viewable in the web portal when an employee has completed a punch entry for a shift by selecting Publish Care Notes and Clock Out or Clock Out without Publishing Care Notes. A care note is automatically created by DCI when a punch is created for a client with active goals for that service code.

Role Required: Employee with a client who has Care Management enabled

Permission Required: N/A

Enter a Care Note and Goal Tracking

1. Log in to the web portal with the employee (base user) profile
2. Click **Care Management** on the main menu
3. Click **Care Notes** on the submenu
4. Use the filters to search for the client and click **Search**
5. **Click anywhere on the entry row needing care notes** to open the Add Care Notes page
6. Click the **Add Results** button on the right side of the page in the task name area
7. Complete the Add Task Result form wizard:
    a. Click **Next** to move to the Task Result tab
    b. Result: Select from the drop-down
    c. Question: If a question is enabled for the task, it will be listed here.
    d. Answer: Select an answer to the question
    e. Notes: Optionally, add notes.
    f. Attachment: Optionally, click the blue **Add Attachment** hyperlink to add an attachment.
    g. Click Save and Yes to confirm adding the new task result
    h. Repeat as necessary to add multiple task results for the task that occurred during the shift
8. Click the **plus sign (+)** next to the task name to view the task result(s)
9. **Click anywhere on the task result row** to view and edit the details, or delete the task result.

View, Edit, Publish, or Delete Care Notes in the Web Portal

1. Log in to the web portal with the employee (base user) profile
    a. Overdue care notes are visible on the dashboard in the Overdue Care Notes widget
2. Click **Care Management** on the main menu
3. Click **Plan of Care** on the submenu to view the client's plan of care
    a. Use the filters to search for a client and click **Search**
    b. **Click anywhere on the row** to view the plan of care details page.
4. Click **Client Summary** on the submenu to view clients with care management enabled
5. Click **Care Notes** on the submenu
    a. Use the filters to search for a care note and click **Search**
    b. Select the Care Note to edit or view by **clicking anywhere in the row**
6. The Add Care Notes page will display
    a. Click the **plus sign (+)** next to the task name to view the task result(s)
    b. **Click anywhere on the task result row** to view and edit the details, or delete the task result.
    c. Click **Actions.** Drop-down menu options include:
        i. Edit Task Result
        ii. Delete Task Result
        iii. New Note
        iv. New Attachment
7. View notes and attachments by selecting a tab on the Add Care Notes page
8. Click **Actions**
9. Select **Publish** from the drop-down menu to publish the Care Note
    a. Please note: Care Notes cannot be edited once published
10. Click **Yes** in the confirmation alert window

Related articles

- Case Workers Guide
- Care Notes - Mobile App
- January 2024 Release Notes
- Care Management - Admin Guide
- Care Notes - Web Portal