## **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