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Case Note Tracking is the system used by Administrators on our BCHC Inpatient Wards. It is a form which allows monitoring of Sending/Receiving Documents for a Client.

Accessing Case Note Tracking

Access via **Menu**

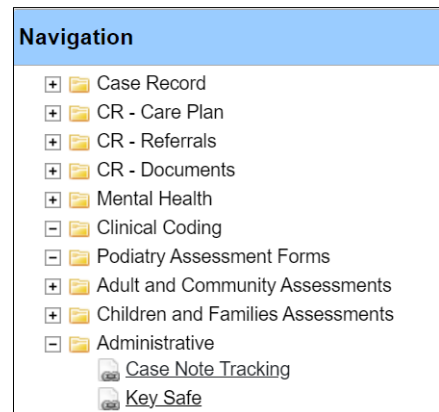
- Click **Quick Menu**
- Click **Client's View**

Search for Client

Clinical Portal – Client's View displays

Navigation Pane (located on right)

- Click **Administrative**
- Click **Case Note Tracking**



The Case Note Tracking form displays

Date/Time: Complete as required

Navigate to the section you wish to complete – are you **sending a document** or **receiving a document**?

Sending document							
File Type	Volume	Sending Service/Ward	Sent to Location	Date/Time Sent	Method of Despatch	Reason for Sending	Action
Please Select ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Please Select ▾	Please Select ▾	<input type="button" value="Add"/>

Receiving document							
File Type	Volume	Receiving Service/Ward	Sent to Location	Date/Time Received	Reason for Receiving	Action	
Please Select ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Please Select ▾	<input type="button" value="Add"/>	



- File Type:** BCHC Notes
- Volume:** (e.g., V1)
- Sending Service/Ward:** (e.g., MHH Ward 6)
- Sent to:** (e.g., WHH Ward 14)
- Date/Time Sent:** Today/Now
- Method of Dispatch:** (e.g., With Patient)
- Reason for Sending:** (e.g., Inpatient Episode)

- Click **Add**

The action you have recorded will now turn green

- Click **Save**

Case Note Tracking Options

Once the Case Note Tracking has been completed there are several options at the bottom of the screen:



Edit Current

This will allow you to open the current form to make any changes if necessary.

Create New

Allows you to create another Tracking form for the Client.

Index

Displays all Case Note Tracking forms in a chronological order.

History

This will show the amendments made to a form – displaying the latter at the top followed by the previous incorrect version.

Lock

This functionality is not used for Case Note Tracking.

Entered In Error

If this is used it will display as shown below:

Case Note Tracking			
Auto-Saved	Date/time	Created by	Locked/Concealed
	3-July-2023-08:00	Janice Pettitt	