SMART Tip Sheets
Case Management

Case Management

- Case Management Activities
- Referrals to Services
- Services Attended

This tip sheet explains how to various types of case management activities, including case management activities, referrals to services, and attendance.

Total Pages: 2

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Case Management

Entering Case Management Activities

1. **Entry Steps**: Login, Select Facility, Client List, select client, Activity List, ECourt, Case Management.

2. Click **Add New** to make a case management entry.

3. Enter the **Event Date** (**Note**: either press the Tab key or click the **Event** field to activate the remaining fields).

4. Select an **Event Type** (**Case Management**, **Referral to Services**, or **Services**). This will populate the **Event** and **Type of Contact** drop down box.

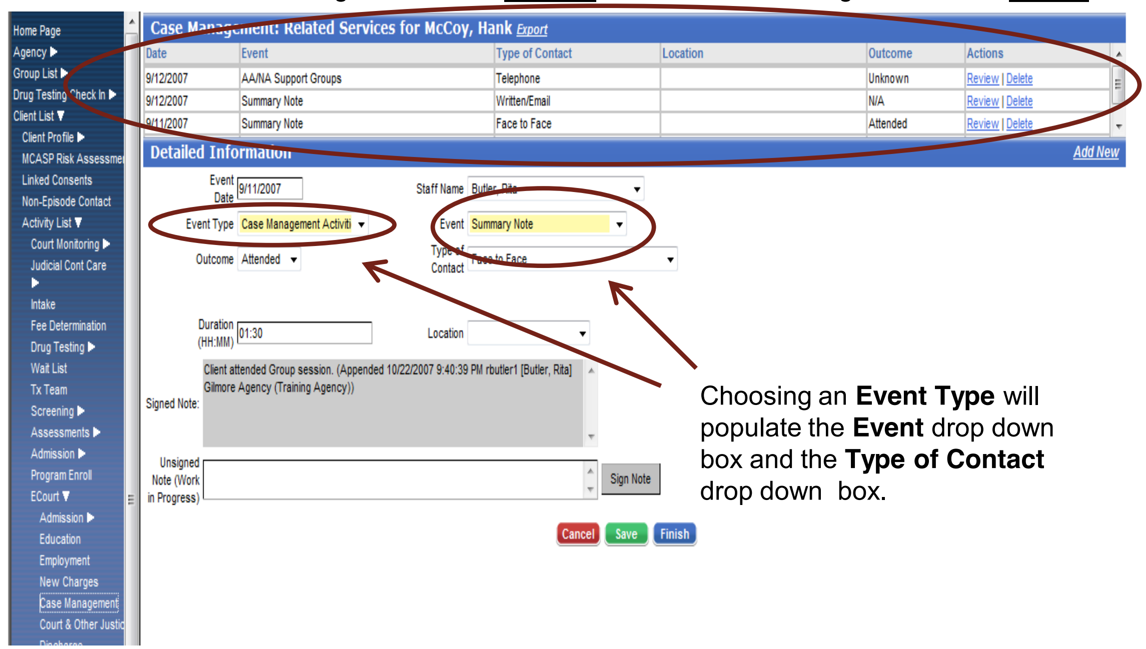
5. When a

6. Continue through the module completing the pertinent information for the **Event**, **Type of Contact**, **Location**, **Staff Name**, **Outcome** and **Duration**.

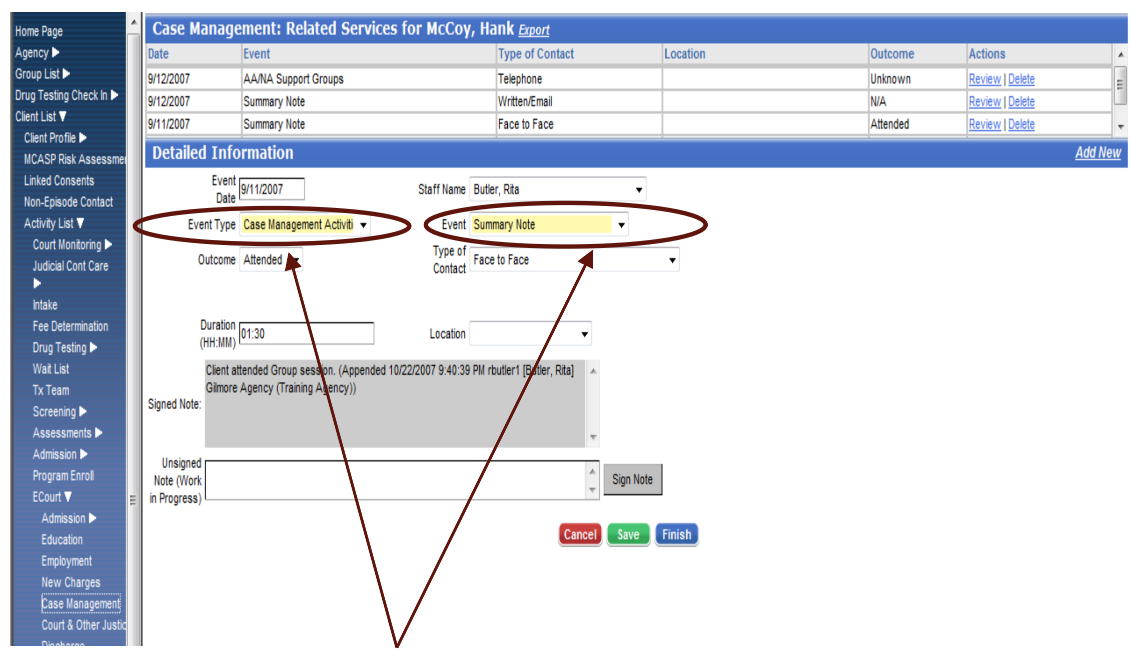
7. **Signed/Unsigned Notes**: This screen contains a **Signed/Unsigned** note function. To make an editable note, enter the note in the **Unsigned Note** field and click **Save** or **Finish**. To electronically sign the note, enter the note in the **Unsigned Note** field and click **Sign Note**. **Note**: Signing a note will certify its content and preclude further editing. However, if the signed note contained erroneous information or additional data needs to be entered, simply enter the new information in the **Unsigned Note** box and click **Sign Note** again.

8. Click **Save** or **Finish** .
   Helpful Hint: To document a case management summary note that will appear on the Client Progress Report, select **Case Management Activities** as the **Event Type** and choose **Summary Note** as the event. **Note**: Only signed notes for **Summary Notes** will appear on the **Client Progress Report**.

The top of the screen provides a historical list of Case Management events for this client's case. To review an existing record, click **Review**. To delete an existing record, click **Delete**.



Choosing an **Event Type** will populate the **Event** drop down box and the **Type of Contact** drop down box.



To ensure that the Summary Note appears on the **Client Progress Report**, select **Case Management Activities** as the **Event Type** and **Summary Note** as the **Event**. Notes must be signed to appear on the Client Progress Report.