

# 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**

IGSR Technical Support: 301.405.4870

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## Case Management

### Entering Case Management Activities

- Entry Steps:** Login, Select Facility, Client List, select client, Activity List, ECourt, Case Management.
- Click **Add New** to make a case management entry.
- Enter the **Event Date** (**Note:** either press the Tab key or click the **Event** field to activate the remaining fields).
- Select an **Event Type** (**Case Management, Referral to Services, or Services**). This will populate the **Event** and **Type of Contact** drop down box.
- When a
- Continue through the module completing the pertinent information for the **Event, Type of Contact, Location, Staff Name, Outcome** and **Duration**.
- 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.
- 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**.

Date	Event	Type of Contact	Location	Outcome	Actions
9/12/2007	AA/NA Support Groups	Telephone		Unknown	<a href="#">Review</a>   <a href="#">Delete</a>
9/12/2007	Summary Note	Written/Email		N/A	<a href="#">Review</a>   <a href="#">Delete</a>
9/11/2007	Summary Note	Face to Face		Attended	<a href="#">Review</a>   <a href="#">Delete</a>

**Detailed Information**

Event Date: 9/11/2007    Staff Name: Butler, Rita

Event Type: Case Management Activities    Event: Summary Note

Outcome: Attended    Type of Contact: Face to Face

Duration (HH:MM): 01:30    Location:

Signed Note: Client attended Group session. (Appended 10/22/2007 9:40:39 PM rbutler1 [Butler, Rita] Gilmore Agency (Training Agency))

Unsigned Note (Work in Progress):

[Cancel](#) [Save](#) [Finish](#)

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

**Detailed Information**

Event Date: 9/11/2007    Staff Name: Butler, Rita

Event Type: Case Management Activities    Event: Summary Note

Outcome: Attended    Type of Contact: Face to Face

Duration (HH:MM): 01:30    Location:

Signed Note: Client attended Group session. (Appended 10/22/2007 9:40:39 PM rbutler1 [Butler, Rita] Gilmore Agency (Training Agency))

Unsigned Note (Work in Progress):

[Cancel](#) [Save](#) [Finish](#)

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.