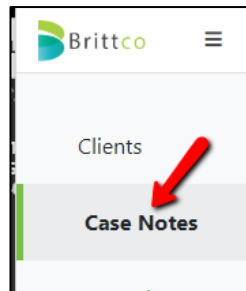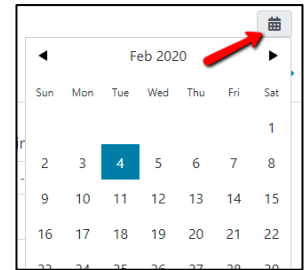# Brittco
## Case Notes

Case Notes, both allowable and unallowable, are available to SSAs and EI staff. Brittco knows which type of note to open based upon your job classification.
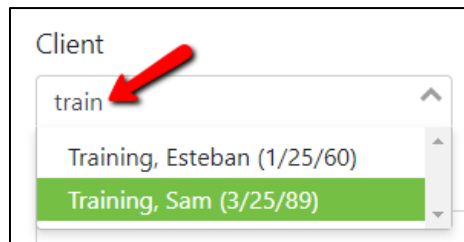
### Entering Case Notes

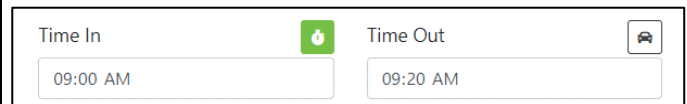Clicking on the Case Notes tab on the left menu will open a blank case note.



The Date of the note defaults to the current day. Change to the correct day if necessary. You can use the calendar picker. You cannot enter a case note for a future date or time.
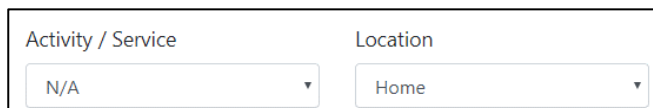


Choose a Client. You can begin typing a last name and the list will filter.
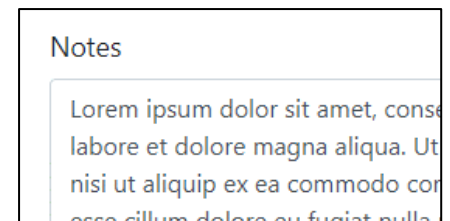


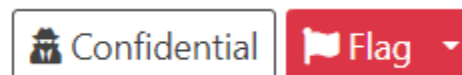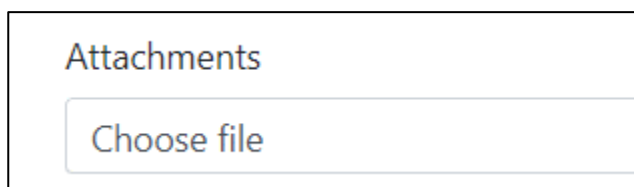Include a *Time In* and a *Time Out*.



Include the correct *Activity/Service* and *Location* fields from the dropdowns. Both are required.



Include a detailed Case Note. Brittco checks your spelling as you type.



Add Attachments if necessary.





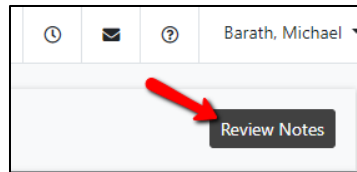You may choose to *Flag* the note for further consideration.

We will not use the *Confidential* button – Please ignore it.

*Flag* will open an additional dialog box. You can add notes and set a future reminder Designate the day and time you want reminded, and whether you want to be sent an email or messaged through Brittco.

**Optional Follow-Up Information**

Note

Return to this note on Thursday after talking to Bob.

I would like to receive a reminder on:

Date: 03/09/2020    Time: 08:00 AM

Via: ● Message  ○ Email

You can write a case note at the same time you are working in another Brittco module, such as *Incidents* or *ISP Plans*. For information, please review the help file on how to write a *Simultaneous Case Note*.

## Reviewing Case Notes

Click the *Review Notes* button to see notes you've written or others to which you have access.

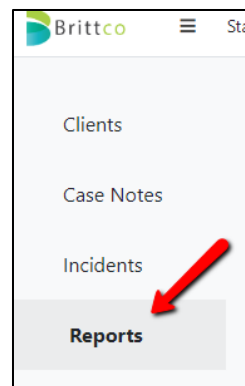[Review Notes]

Filter notes by date ranges, clients, staff, and more.

Start Date: 03/01/2020    End Date: 03/02/2020

Client    Staff

Activity / Service    Location

Special

Note: Enter text...

[Apply Filters]

A very useful feature is the ability to search for notes based upon the content of the actual note.

| Date ▲ | Client ⇕ | Staff ⇕ | Location ⇕ | Service ⇕ | Note ⇕ |
|--------|----------|---------|-----------|-----------|--------|
| 3/1/20 9:00am-9:13am | Training, Sam | Barath, Michael | TCM Other | N/A | Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. U... See More |

| Date ▲ | Client ⇕ | Staff ⇕ | Location ⇕ | Service ⇕ | Note ⇕ |
|--------|----------|---------|-----------|-----------|--------|

Filter the results alphabetically or chronologically by any of the Headings.
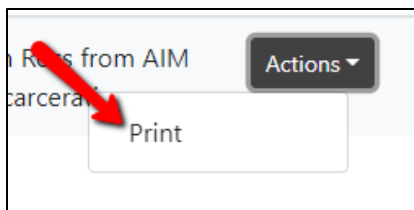
Clicking on the *Action* button next to a case note will allow you to print it.

[Actions ▾]  Print

You can also review case notes through *Reports*.

Clients

Case Notes

Incidents

**Reports**

Please call the IT Department if you have any questions regarding the information presented here. The extension for the IT Help Desk is 7878.