



FSFN Release 1 Create Case Note Tips

Create Case Notes

- Create Case Note from the desktop
 - Select the Actions hyperlink next to the Case Name
 - From the Actions pop-up page, select the Create Case Note radio button
 - Click the Continue button
 - **TIP:**
 - These steps also apply to creating a case note from Case and Person Search.

- Document Case Note Details
 - Select or Multi-select case participants names for whom you want to document case note details
 - Once the name(s) are highlighted, perform one of the two following actions:
 - Click the 'Add Face-to-Face Contacts' hyperlink if you are wanting to document a face-to-face contact note
 - Finish documenting the required fields and save. This will associate the note with the participant(s) that was highlighted.
 - If the 'Add Face-to-Face Contacts' hyperlink was selected, be sure to document the Face-to-Face Contact details within the Contact Information expando
 - Click the Save button
 - Click the Close button
 - **TIP:**
 - You must select and/or add the Case Participants for whom you want to create the note prior to saving the record. If you save before selecting the participants, the participants' names will no longer appear in the Participants group box.



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Case Notes - Microsoft Internet Explorer

Florida Safe Families Network

Print Audit Spell Check Help ?

Case Note

Case Name: goodfella, bobby Worker Creating Note: Conn Corn Worker Making Contact: Conn Corn [Search](#)

Case Note ID: Date Entered: Other

Note Information

Contact Begin Date: 00:00/0000 00:00 AM PM

Contact End Date: 00:00/0000 00:00 AM PM

Category:

Type:

Worker Activity Code:

Participants:

Hold down the 'Ctrl' key for multi-selection
[Add Face-to-Face Contacts](#)

Narrative

Contact Information

Done Trusted sites