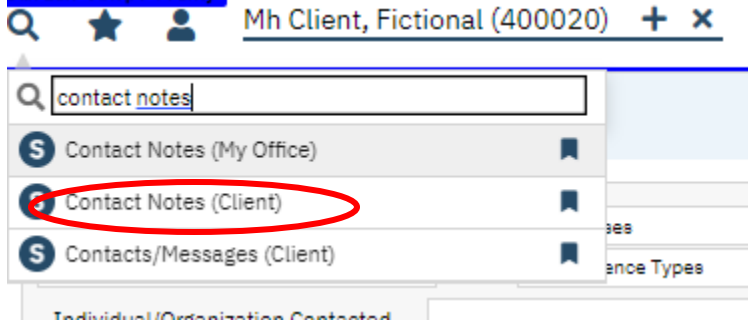


CONTACT NOTES

1. In SmartCare with Client selected go to Contact Notes (client).



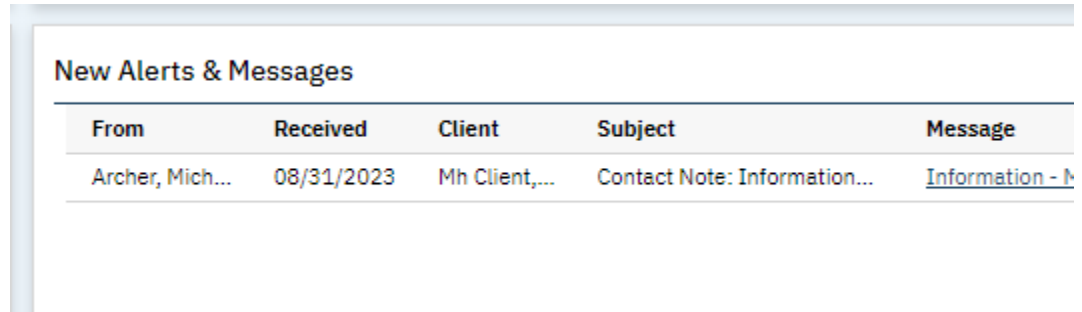
2. This screen will show you previous Contact Notes written for this client.

3. To write a new one, select new from upper right of screen.
4. Under Reason select appropriate reason such as Authorization, Follow Up, Information, or Medical Reports.
5. Select Type: Intake, Update, Visit.
6. Select Associated Program.
7. Write contact note including date of service notes, or scanned documents referenced and what is being requested.
8. Select Notify staff member about this contact and enter staff name.
9. Select Save.

The screenshot displays the 'Contact Note Detail' form. At the top, there are navigation icons and a 'Save' button. The form has two tabs: 'Contact Note' and 'RWQM'. The 'Contact Note' tab is active. The form contains the following fields and values:

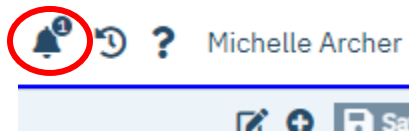
- Contact Date/Time: 09/06/2023 11:56 AM
- Reference Type: Contact Note Reference Id: 0
- Reason: Follow up
- Type: Visit
- Status: (empty dropdown)
- Assigned To: Archer, Michelle
- Individual/Organization Contacted: (empty text box)
- Associated Program: NCA Clinic MD Adult (2009)-(v)
- Details of contact: (empty dropdown)
- Text area: See labs dated 8/1/2023, request additional tests.
- Notify team about this contact: (unchecked checkbox)
- Notify staff member about this contact: (checked checkbox) McGuire, Kathy

10. The notified staff member will see the notification in two places.
- a. On the Dashboard in the New Alerts & Messages widget.



From	Received	Client	Subject	Message
Archer, Mich...	08/31/2023	Mh Client,...	Contact Note: Information...	Information - M

- b. Also on the notification alert at the top of the SmartCare screen.



11. To access the Contact Note staff will go to the New Alerts & Messages widget on the Dashboard and click on message. This will bring staff to the screen to show the note.
- a. It can also be accessed through the Contact Notes (client) screen but the notification will not clear until accessed through the New Alerts & Messages widget.