

ISmart Misc. Notes

Add a Misc. Note for the following situations:

1. When trying to reach the client (I.e.-rescheduling appointments, etc.)
2. When you receive a call or voice mail from the client.
3. When you send a letter to the client (I.e.- 5-day letter.)
4. Use these for all the clients NS, CAN and RS appointments.
5. When you talk with anyone regarding the client's treatment involvement (DHS, probation, court, Abbe Center, other ASAC employees, etc.)
6. Use when the Treatment Plan is developed late or if the Treatment Review is conducted late.
7. UA Reports from Forensics. (See Section F.5 or Appendix A for more information.)
8. Admit Info note (See Section F.4)
9. Permission For Follow Up note. (See Section F.5)
10. Explanation of something in the file. (I.e. – when the DOB or SS# was entered wrong which caused the Client ID # to be incorrect, etc.)
11. Use this for any pertinent information for the file/case.

Some more specifics on what to put into the Misc. note:

1. It is recommended that you document the time. If a client contacts you during the day then be sure to take note of the time they called and document that in the note. (I.e. - "Client contact me at 12:15pm.)
2. If you are documenting a call to you, make sure to document the name of who contacted you (DHS workers, court workers, probation officers, etc.)
3. It is recommended that you clearly state what the conversation was about and what was said.
4. And with all notes, please be specific, but please be brief.

To enter in a Misc. Note.

1. In the client's ISmart file, click on Notes module.
2. Click on Add New Misc. Note hyperlink.
 - a. Note Type = Note to File
 - b. Service Date = is automatically filled in with today's date, change if appropriate.
 - c. Program: Choose the name of the Program that this note pertains to.
 - d. Summary = Type of Misc. Note (I.e.- Client NS.)
 - e. Unsigned Notes = type your note in this box.
 - f. Click on Sign Note button when finished. This moves your note up to the Signed Notes box and it now cannot be changed.
 - g. Click on Finish.

Once a Misc. Note has been entered and have clicked on the "Sign Note" button the note cannot be changed. You can however go back in the Misc. Note and add to the notes portion. When you do this the system time stamps the added note so that you can tell the difference between the original note and the added note.

In some cases a Misc. Note is used to copy a document, such as an email or Word document, into the Misc. Note. If you copy a Word document that was intended to be a printed form, make sure to take out any unnecessary lines. If you leave the lines in the copied document this causes the Print Note feature to not view correctly on the screen.