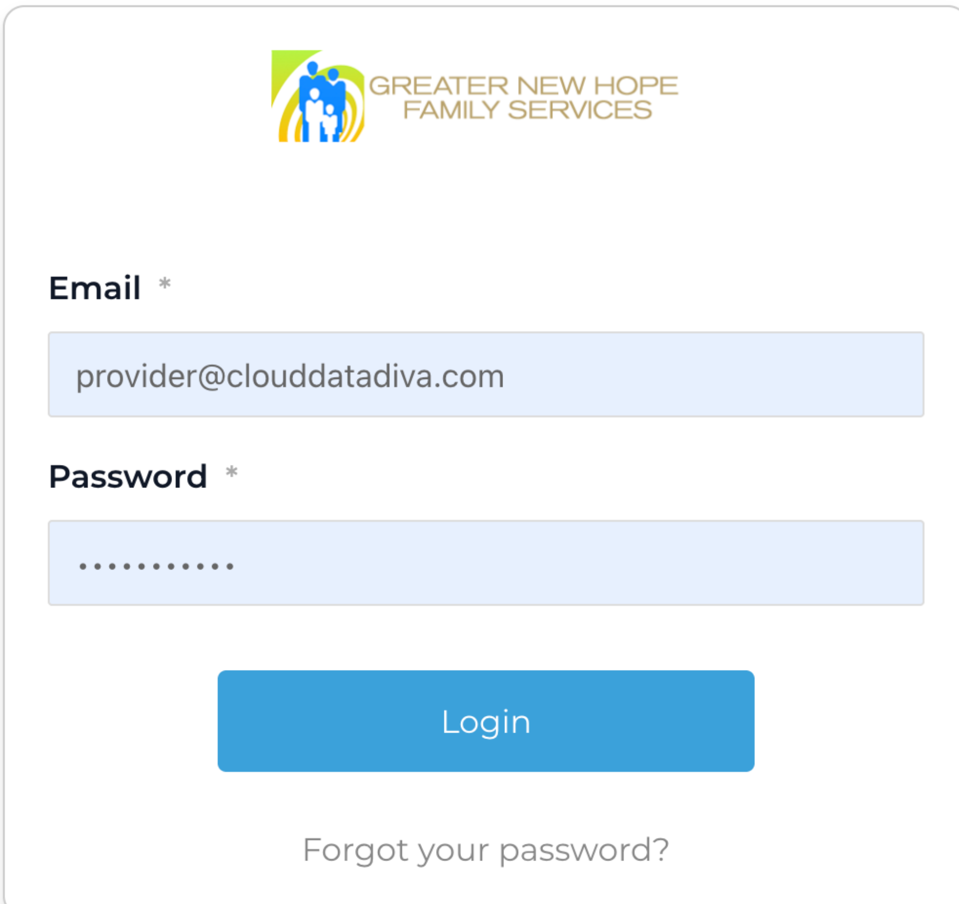
Create a Case Note – Step-by-Step Guide

This guide walks providers through how to create and submit a case note in the Greater New Hope Family Services portal.

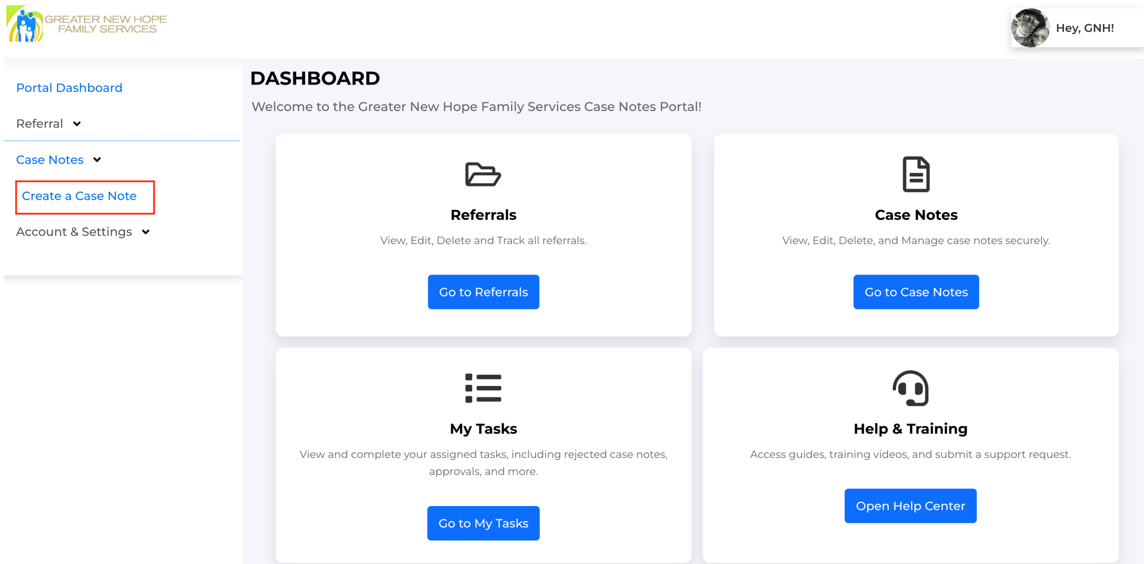
1. Log In

Log in using your email and password.



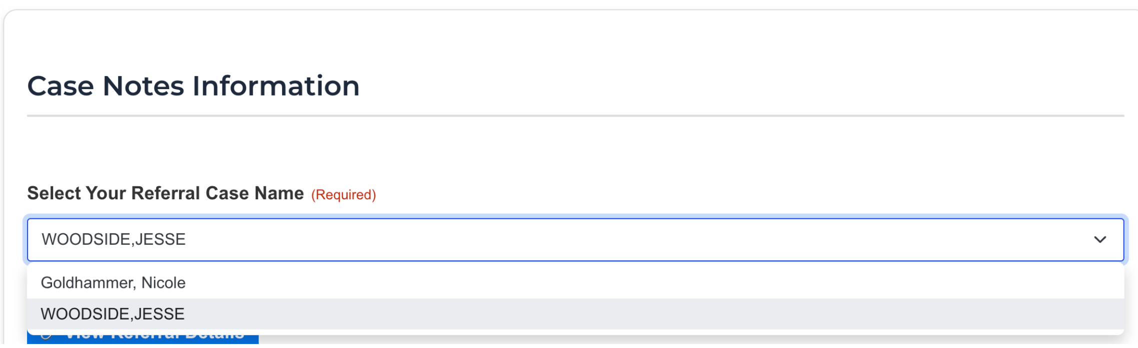
2. Start a New Case Note

From the Portal Dashboard, click 'Create a Case Note' under the Case Notes section.



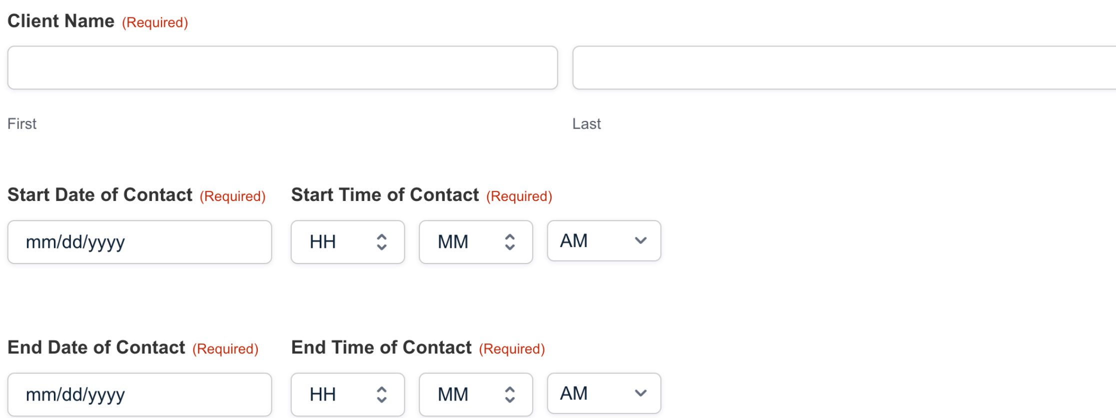
3. Select a Referral

Choose a Referral Case Name from the dropdown. Only referrals assigned to your group will be visible.



4. Fill Out Required Fields

Complete all required fields:
- Client Name
- Date & Time of Contact
- Safety Check Information


Client Name (Required)

First

Last

Start Date of Contact (Required)

mm/dd/yyyy

Start Time of Contact (Required)

HH MM AM

End Date of Contact (Required)

mm/dd/yyyy

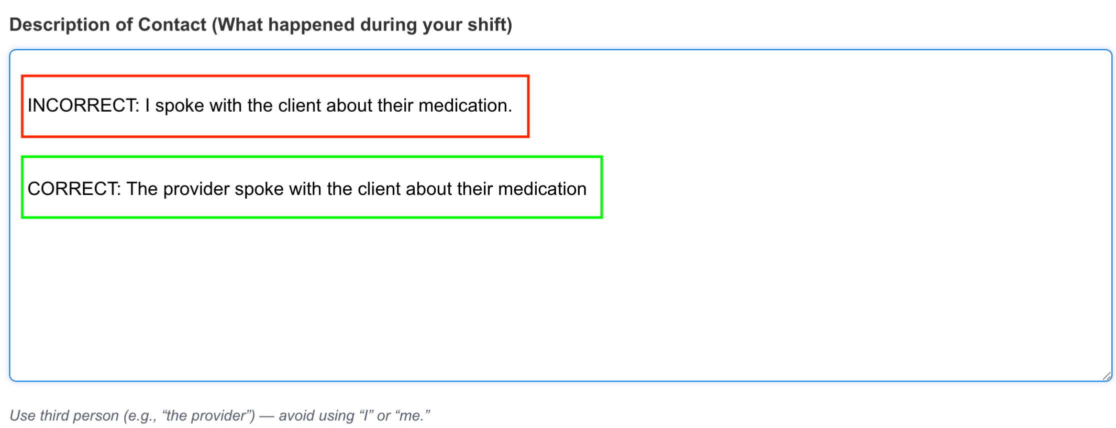
End Time of Contact (Required)

HH MM AM

5. Write the Description of Contact (3rd Person Only)

When completing the Description of Contact:
- Always write in third person (e.g., "the provider spoke with the client").
- Do not use "I," "me," or "we."

⚠️ Case notes written in first person will be rejected and sent back for correction.


Description of Contact (What happened during your shift)

INCORRECT: I spoke with the client about their medication.

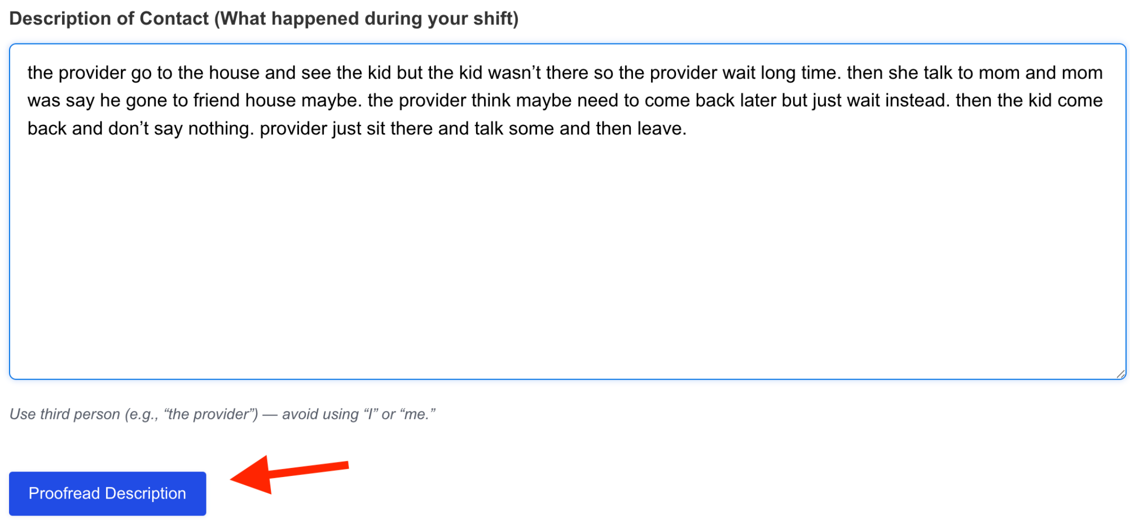
CORRECT: The provider spoke with the client about their medication

Use third person (e.g., "the provider") — avoid using "I" or "me."

6. Click the 'Proofread' Button

After writing the Description of Contact, click the Proofread button.
- This is required before submission.
- The system will check your grammar and display a cleaned version.

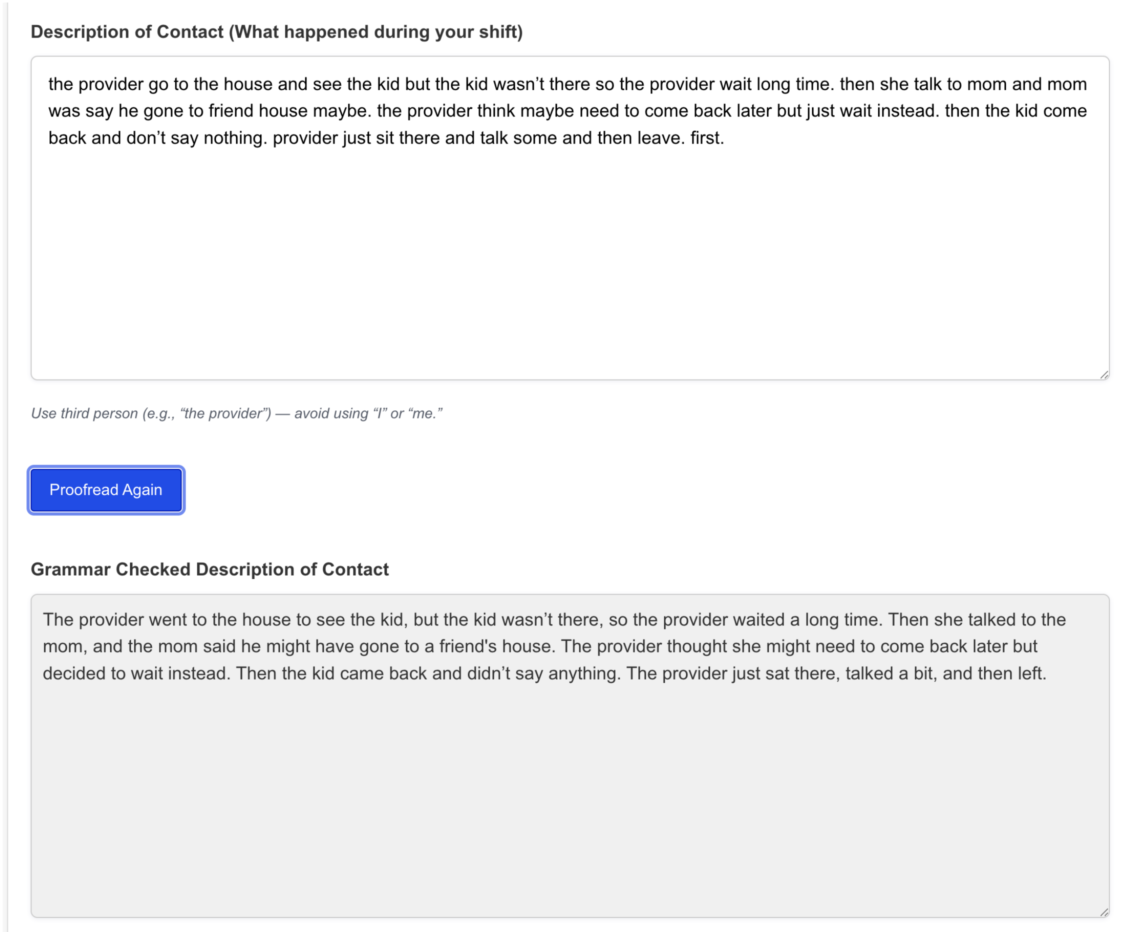
You must click Proofread before the form will allow you to select "Yes, I'm ready to submit to Admin."



7. Review the Cleaned Version

After proofreading:
- A grammar-checked version will appear in the "Grammar Checked Description of Contact" field.
- Review it carefully.
- If needed, edit your original Description and click Proofread again.

You can proofread as many times as needed.


Description of Contact (What happened during your shift)

the provider go to the house and see the kid but the kid wasn’t there so the provider wait long time. then she talk to mom and mom was say he gone to friend house maybe. the provider think maybe need to come back later but just wait instead. then the kid come back and don’t say nothing. provider just sit there and talk some and then leave. first.

Use third person (e.g., “the provider”) — avoid using “I” or “me.”

Proofread Again

Grammar Checked Description of Contact

The provider went to the house to see the kid, but the kid wasn’t there, so the provider waited a long time. Then she talked to the mom, and the mom said he might have gone to a friend's house. The provider thought she might need to come back later but decided to wait instead. Then the kid came back and didn’t say anything. The provider just sat there, talked a bit, and then left.

8. Final Review Before Submission

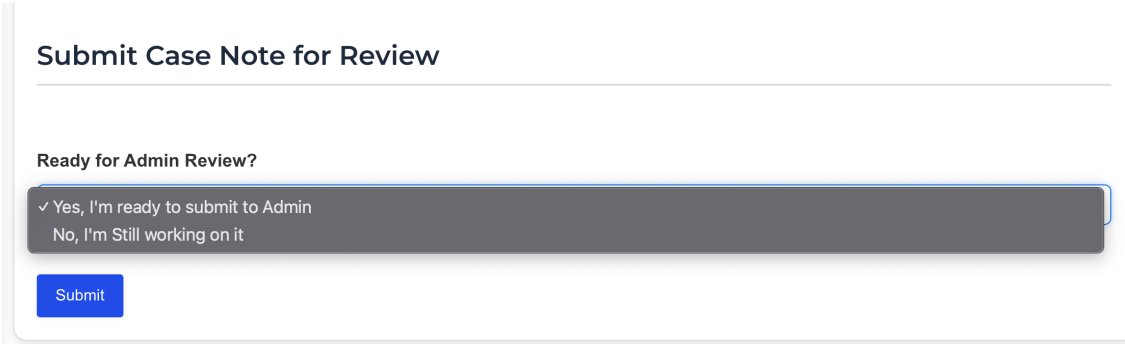
Before submitting:
- Make sure all required fields are completed.
- Ensure you've proofread your Description of Contact.

At the bottom of the form, you’ll see:
“Ready for Admin Review” – select one:

• No, I’m still working on it
→ You’ll receive a confirmation email with a special link to return and finish later.

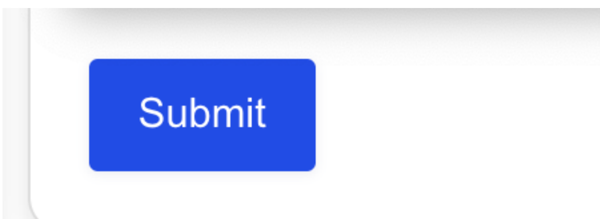
• Yes, I’m ready to submit to Admin
→ Your case note will enter the approval workflow.

⚠️ You cannot select "Yes" unless you have clicked Proofread first.



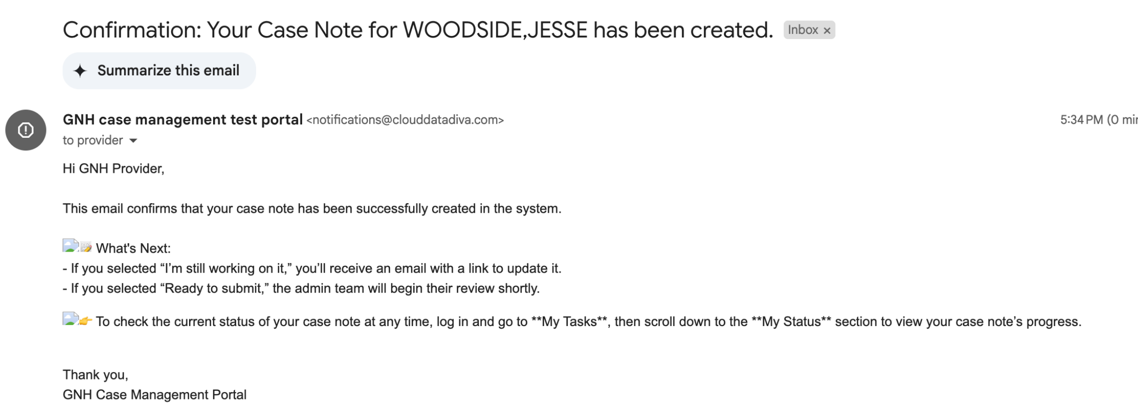
9. Submit the Case Note

Once you've selected your review option, click Submit at the bottom of the form.
- If you selected Yes, your note enters the admin approval workflow.
- If you selected No, you'll get an email with a link to finish and submit later.



10. After Submission: What Happens Next

If you selected Yes, I'm ready to submit to Admin:
- You'll receive a confirmation email.



- An admin is notified and will review your submission.
- You can check the status anytime under My Tasks > My Status in the portal.

My Status.

All (6) | Pending (1) | Complete (5) | Cancelled (0)

ID Start: yyyy-mm- End: yyyy-mm- Workflow Form Apply

Bulk actions Apply

6 items

	ID	Date	Form	Submitter	Step	Status	Client Name	Ready for Admin Review?
	329	10 minutes ago	Case Note Form	GNH Provider	Admin Approval Request	Pending 10m, 2s	Jesse Woodside	Yes

11. If You Selected “No, I’m Still Working On It”

If you’re not ready to submit yet:
- You’ll get an email with a special link to return and finish later.

📝 Your Case Note is in Progress — Complete it when ready Inbox ×

GNH case management test portal <notifications@clouddatadiva.com>
to provider

Hi GNH,

Your new Case Note is currently marked as **“No, I’m still working on it.”**

What to do next:

Still Working?
Edit the note while keeping the status as *No, I’m still working on it.*

Click here to update your Case Note

Ready to Submit?
Change the status to *Yes, I’m ready to submit to Admin*, leave a short message, and submit it via your task inbox:

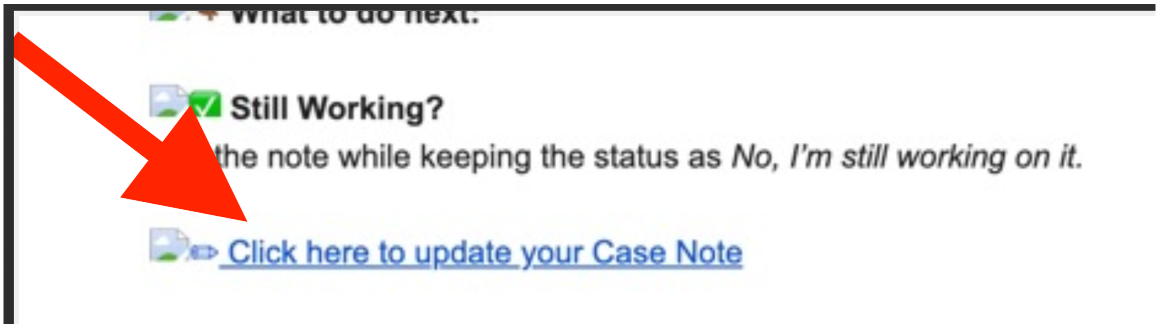
Submit via My Tasks

Once approved, the note will be locked (unless you're an admin).

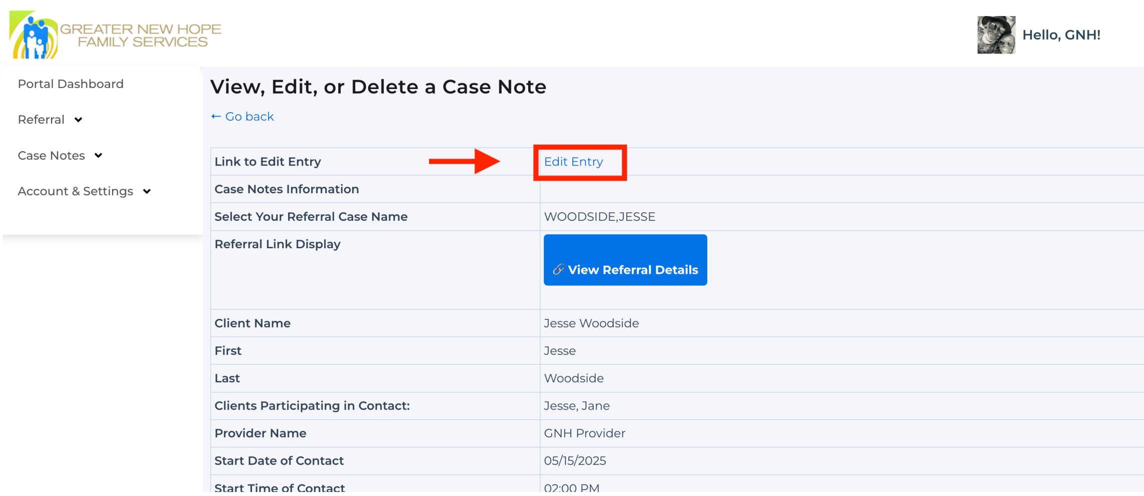
Thanks!

- Your case note is saved as a draft and not visible to the admin workflow.

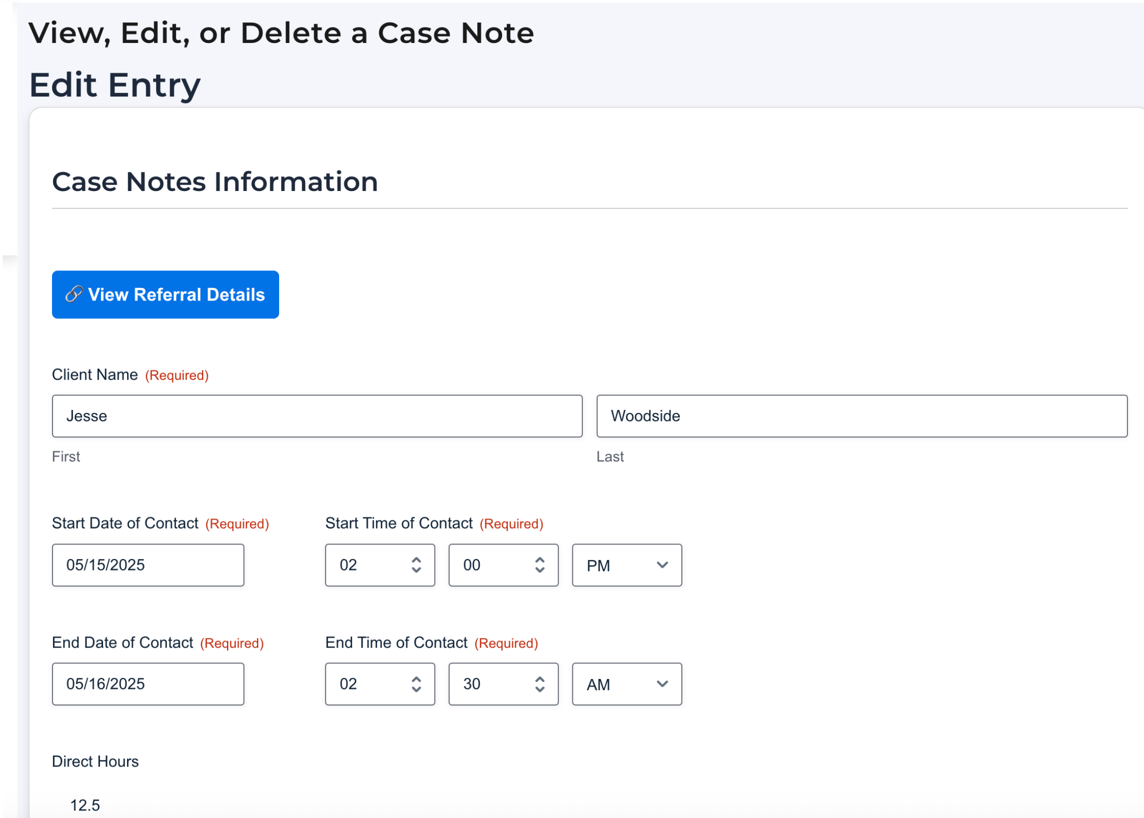
To continue later:
1. Open the email and click “Click here to update your Case Note”.

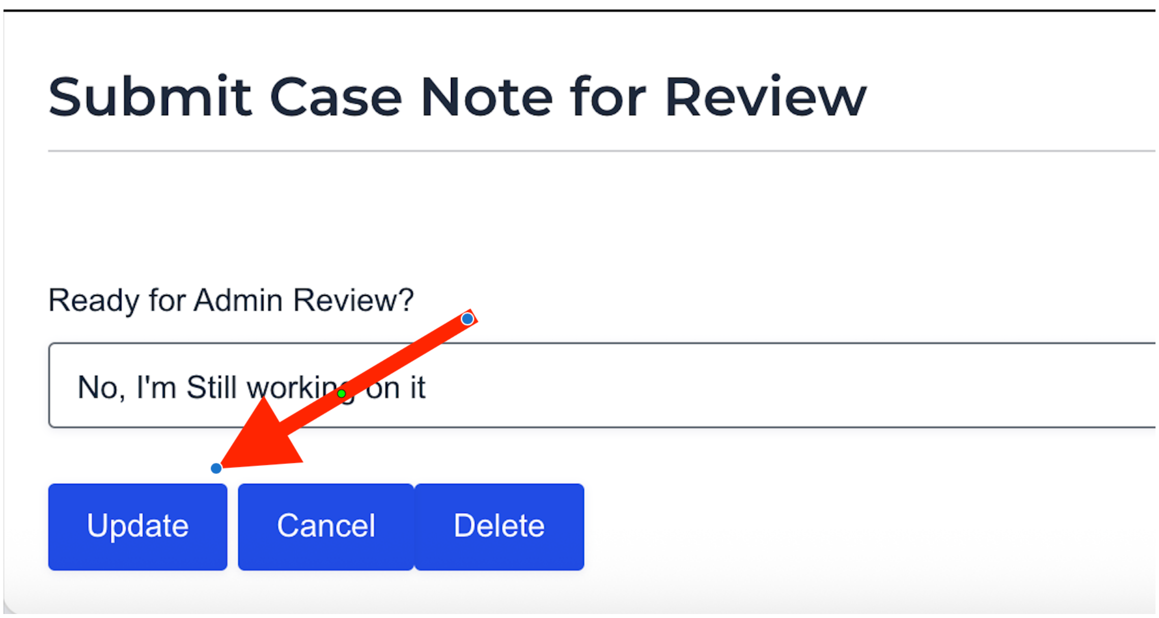


2. Make any needed updates by clicking the “Edit Entry” link.



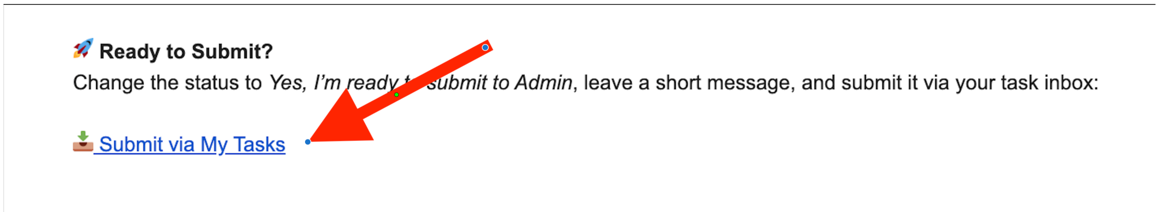
3. You will then be taken to the Edit Entry form where you can make desired update to any of the fields on the form. When you are ready to save your changes, click Update (keeping "No" selected if still not ready).



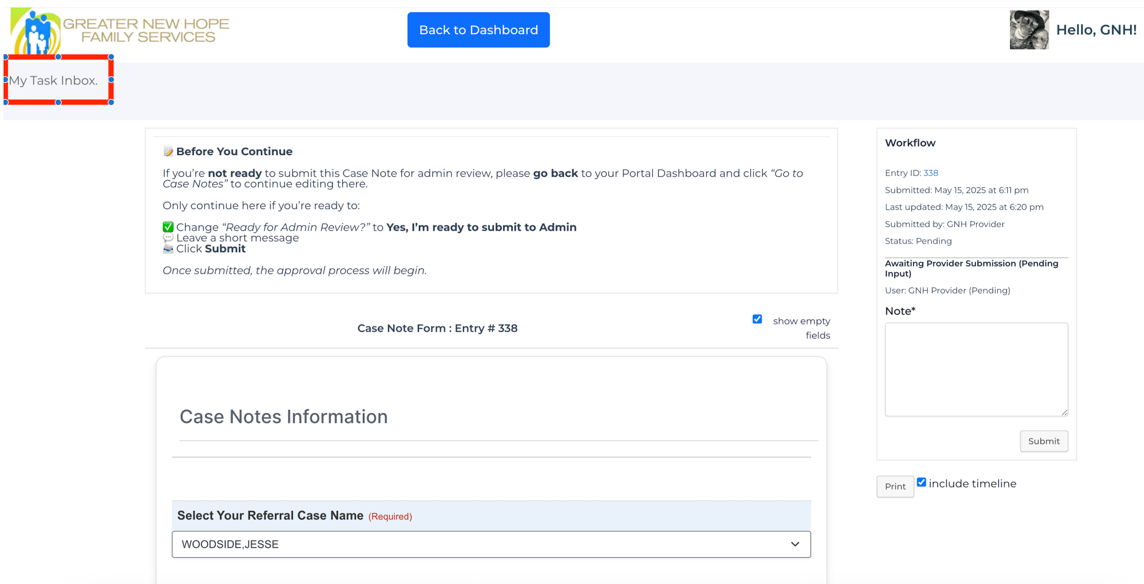


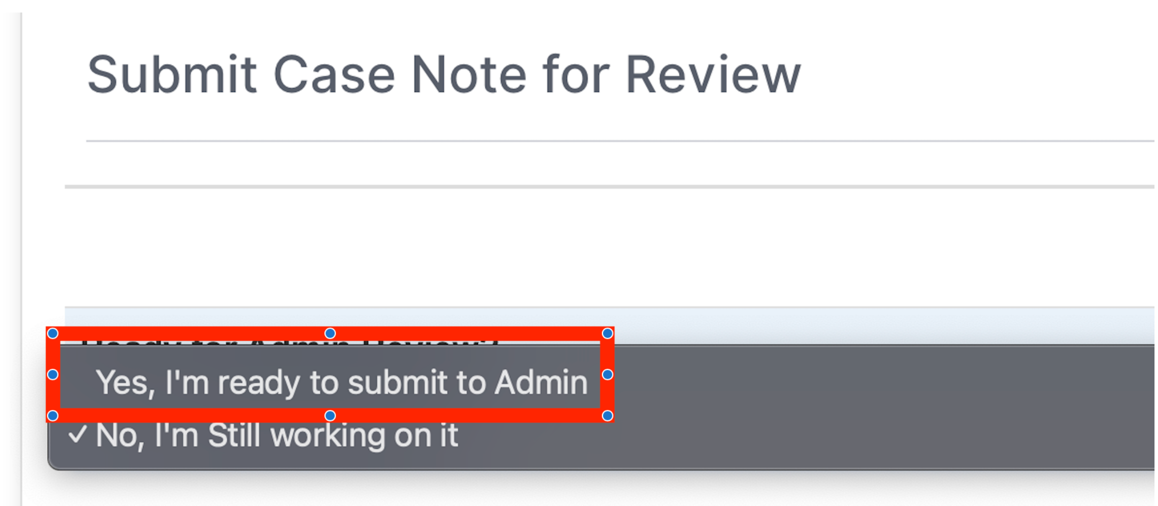
4. When ready to submit:
   - Re-open the email.
   - Go to the 🚀 Ready to Submit? section.

- Click Submit via My Tasks.

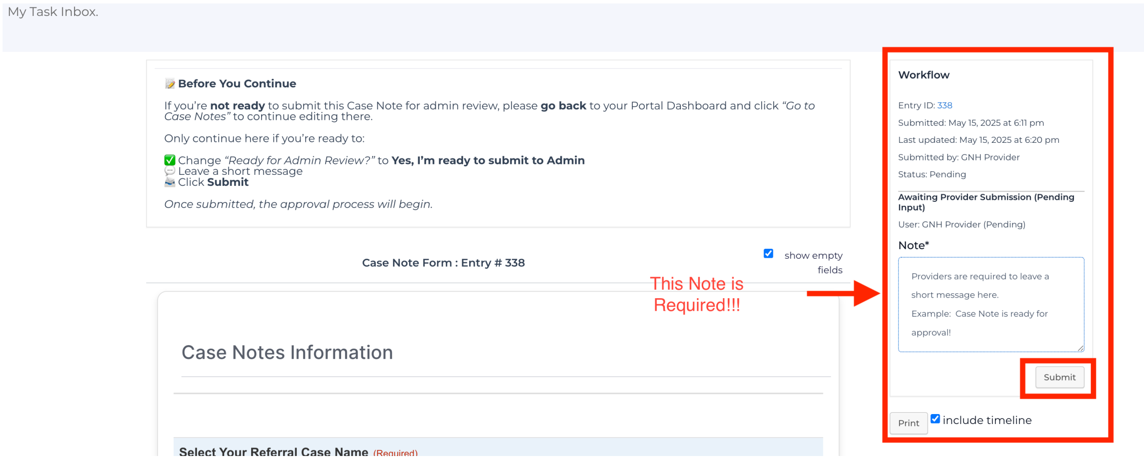


This takes you to your My Task Inbox, where you must:
- Select Yes, I'm ready to submit to Admin. You can also make last minute changes here before submitting your case note.





- Leave a **required** short message explaining your submission.
- Click Submit



- You will see a message confirming that your case note has been submitted to an admin.

⚠️ The workflow will not begin unless you submit through the "Submit via My Tasks" link in your email or portal.

12. Reminder

Your case note will not move forward for review until it is explicitly submitted for admin review.

13. Next Steps

Once your note has been submitted, it enters the workflow process.
To learn what happens next (approval, rejection, edits, etc.), visit the Case Notes Workflow documentation.