CONNECTIONS Clue

Use a Specialty Path and you don't need an assignment to a case to enter Progress Notes…

When support staff have the responsibility of entering Progress Notes they do not need to be assigned a role in the case. They only need the security Business Functions of Enter Progress Note and Case/Prsn Srch.

1. Select Search/Maintain dropdown
2. Select Case/Stage
3. Enter Stage ID
4. Select Search
5. Select Case/Stage returned on Case List
6. Select Case Summary from newly displayed tabs
7. Select Stage Events from newly displayed tabs
8. Select correct stage; the Progress Note link in the navigation pane will enable.
9. Select the Progress Note link; the Progress Note window will display.