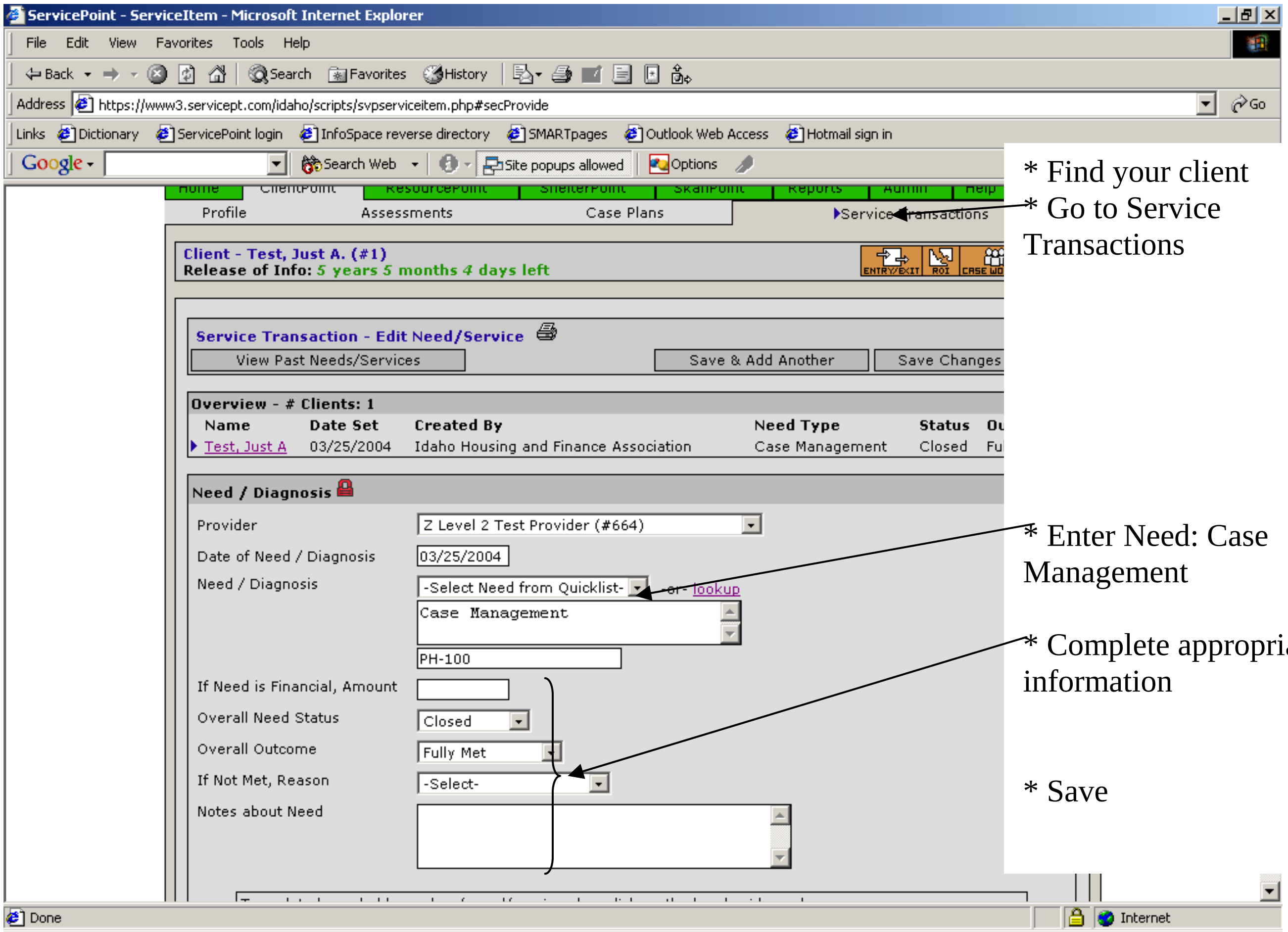
How To Log
CASE MANAGEMENT

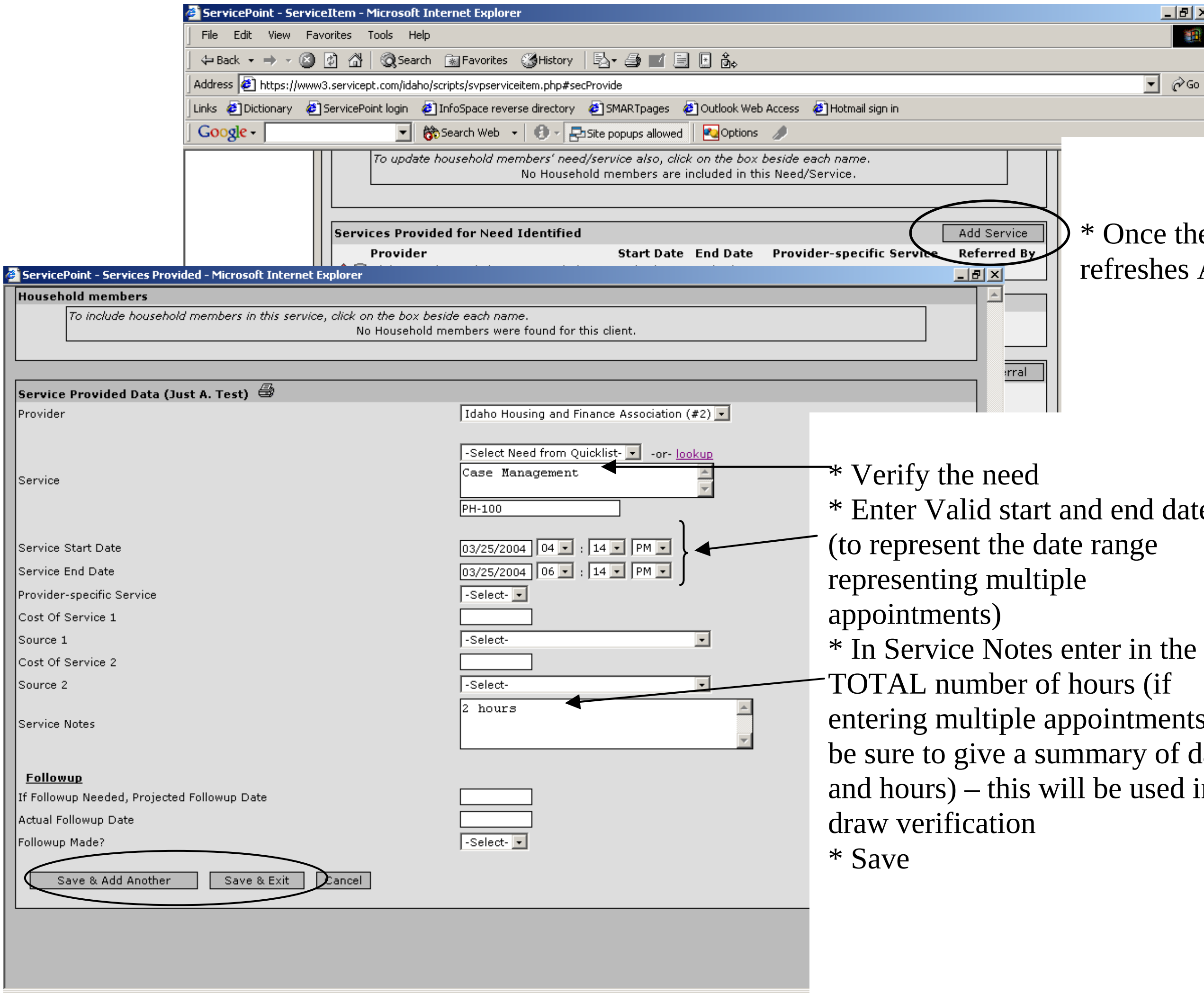


* Find your client
* Go to Service Transactions

* Enter Need: Case Management

* Complete appropriate information

* Save



* Once the screen refreshes Add Service

* Verify the need
* Enter Valid start and end dates (to represent the date range representing multiple appointments)
* In Service Notes enter in the TOTAL number of hours (if entering multiple appointments be sure to give a summary of date and hours) – this will be used in draw verification
* Save