

Recording case notes on MOSAIC

Click on **Case Notes** from the *Person Summary* screen

Adding a case note

What do I need to fill in?

Click on **Add**
Title Enter a brief description of what the case note is about

Type of Note Select the type of case note you are recording.

Date and Time This should be the date and time of the contact so back date/time if need be.

Note Enter the specifics of the case note (If you have written up the case note on a word document you can copy and paste it – this also applies for emails)

Significant Event?

If so then click in **Significant Event** this will highlight the case note on the summary screen

Do you want to Alert another worker?

If so click on **Add Alert Recipients for this Case Note?**
click on **Find Worker** enter the worker's name, click on **Find** click on the worker's name (Repeat to add further workers)

What do the buttons do?

Click on **Save and Continue** if you have entered a substantial amount of information and you want to save what you have written already and carry on entering information.

Click on **Save and Close** if you have started working on a case note and you haven't quite finished it yet and you want to come back to it another time to finish it off (See [Where do I find Case Notes I've Saved and Closed](#)).

Click on **Finish** button once you have written up your case note and you want to save and finish it.

How do I only view case notes entered by me?

Click on **Find Case Note** select your name from **Entered By** then click **Find**
(You can also filter this list by a keyword(s) in a Title, notes entered between dates or by Type)

CASE NOTES SUMMARY SCREEN

How do I view a case note?

Click on the case note Title or click on **View** to open up the most recent recorded case note

How do I append a case note?

Click on **Append** append your case note then click on **Finish**

How do I copy a case note to a sibling?


Click on **Copy** click in the next to the sibling that you want to copy the case note to then click on **Copy**

Once you have copied the case note you have an opportunity to make amendments to the copied case note. Click on **Show Related People** then click on the **Copy** next to the copied case note. Update as required then click on the **Finish** button.

Even if you don't want to make any amendments you still need to finish the copied case note

Finding Unfinished Case Notes that have been Saved and Closed?

UNFINISHED CASE NOTES WIDGET


Unfinished case notes are accessed from the widget on your home page .

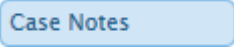


The unfinished Case Notes widget is displayed in the bottom right corner of your home page.

Saved and Closed Case Notes and the 24 hour rule


It is expected that all case notes should be **Finished** within 24 hours.

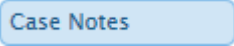


Within 24 hours


The case note will have a status of  in the widget. Click on the subject's name, then click on

 Click on the  next to the case note and update as required, click on the  button

Outside 24 hours

The case note will have a status of  in the widget. Click on the subject's name, then click on

 Click on the  next to the case note and update as required, click on the  button

You won't be able to change any information that you entered previously but you can append the case note (the same principal as using the )

Update as required, click on the  button

You can also finish off case notes copied to a sibling in this way



Status	Title	Subject	Effective Date
	T/C to Sarah Gordon (Fred's mother)	Fred Gordon	29/03/2016

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Alerts		
Title	Subject	Date
Case note alert	Fred Gordon	12/04/2016

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Alert: Fred Gordon - Case note alert

A case note has been added to the record of Fred Gordon (2131561) by Patrick Dorrian (7002028)

Title: T/C to Sarah Gordon (Fred's mother)
Type: Telephone Contact
Date/Time: 12/04/2016 16:21
Recipients:
 Patrick Dorrian

OK Acknowledge View Case Note

Case note alerts

What do I do with Alerts?

Case notes are accessed from the Alert widget on your home page.

The unfinished Case Notes widget is displayed in the bottom left corner of your home page. Click on Case note alert.

The case note alert will appear. Click on

[View Case Note](#)

to read the full details of the case note