

## Secure Case Note

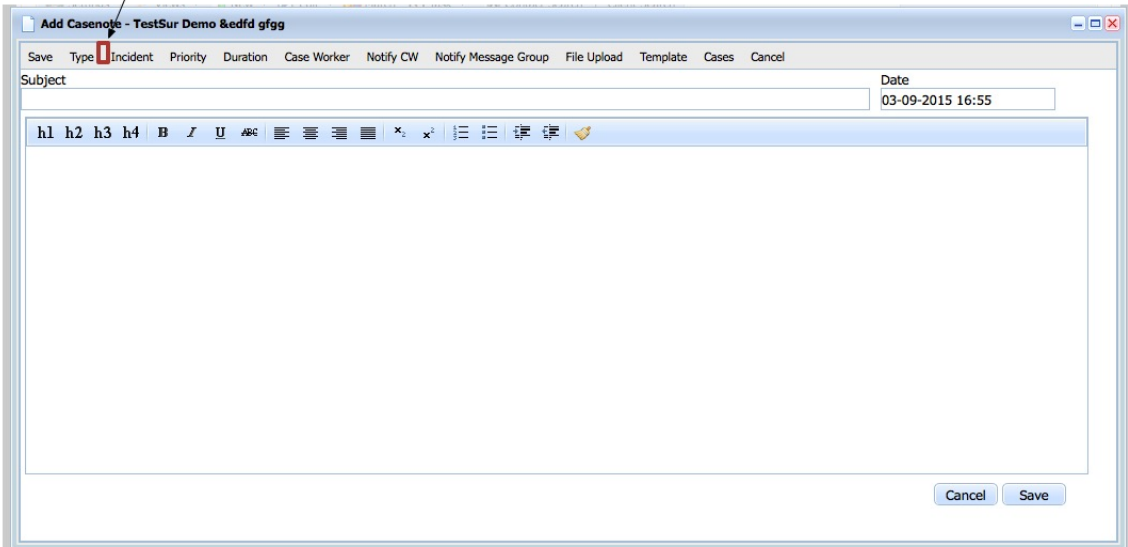
### Requirement:

1. We need to add another case note type called Secured note
2. Each of the secured case note type will have same sub types
3. There should be a way to add duration manually
4. Only Caseworkers with secured case note permission set to yes, should see the secured note option and sub options in the case note tab

### 1. Secure Note:

“Secure Note” type should be a separate tab beside “type” tab. See below the secured case note types.

Secured note type



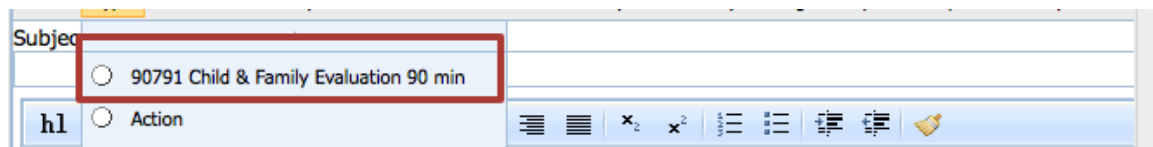
The screenshot shows a window titled "Add Casenote - TestSur Demo &edfd gfgg". It has a menu bar with "Save", "Type", "Incident", "Priority", "Duration", "Case Worker", "Notify CW", "Notify Message Group", "File Upload", "Template", "Cases", and "Cancel". Below the menu bar, there is a "Subject" field and a "Date" field with the value "03-09-2015 16:55". A rich text editor toolbar is visible, and the main area is a large text box. At the bottom right, there are "Cancel" and "Save" buttons. An arrow points to the "Incident" tab in the menu bar, which is labeled "Secured note type".

“Secure Note” Types:

CPT Code		
90791	Child & Family Evaluation	90 min
90832	Individual Counseling- Adult	30 min
90832	Individual Counseling- Child	30 min
90791	Adult Evaluation	90 min

90834	Individual Counseling-Adult	45 min
90834	Child + Adult Individual Counseling-Adult	45 min
90846	Family Counseling w/o Patient	
90846	Child + Family Counseling w/o Patient	
90847	Family Counseling w/ Patient	45-60 min
90847	C + Family Counseling w/Patient	45-60 min
90847-52	C + Family Counseling w/ Patient- Abbreviated	
90853	Group Counseling	45-60 min
90853	Child & Family Group Counseling	45-60 min

Displaying the secure note type:



By default this should be the subject of the note as well which the CW with access to secured note, can edit.

## 2. Secured Note sub types

Each secure note type should have same below sub types

### **ADD DROP DOWN FOR TYPE**

- phone call collateral
- phone call client
- e-mail
- team meeting
- school meeting
- report writing
- report research
- treatment planning research
- assessments

Displaying the sub types of secured note type:

<input type="radio"/> 90791 Child & Family Evaluation 90 min	<ul style="list-style-type: none"> <li>-phone call collateral</li> <li>-phone call client</li> <li>-e-mail</li> <li>-team meeting</li> <li>-school meeting</li> <li>-report writing</li> <li>-report research</li> <li>-treatment planning research</li> <li>-assessments</li> </ul>
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### 3. Ability to add duration manually

There should be an option “other” which on selecting should allow the CW/AA to enter the minutes or hours manually. **AT ASAP requires this feature.**

The screenshot shows a software window titled "Add Casenote - TestSur Demo &edfd gfgg". It has a menu bar with options: Save, Type, Incident, Priority, Duration, Case Worker, Notify CW, Notify Message Group, File Upload, Template, Cases, and Cancel. The "Duration" menu is open, showing a list of radio button options: None, 5 Minutes, 10 Minutes, 15 Minutes, 30 Minutes, 45 Minutes, 1 Hour, 1 1/4 Hours, 1 1/2 Hours, 1 3/4 Hours, and 2 Hours. The "Subject" field contains "h1 h2 h3 h4 B I". The "Date" field shows "03-09-2015 18:00".

### 4. Secure note access depended on CW permission

Only those caseworker, who has case note security set to yes will see the second tab “secure note” in case note.

The screenshot shows the 'Edit Caseworker' window with the following sections and fields:

- save** button
- Contact Information** (expandable)
- Program, Type, Group and Client Assignment** (expandable)
- Security Information** (expandable, currently expanded)
  - Your Answer: somewhere
  - Caseworker security: Edit owned group and view all (dropdown)
  - Caseworker security: View and edit all AP & BP financials (dropdown)
  - Caseworker security: ☐ Yes ☒ No
  - Display in user detail record: ☐ Yes ☒ No
  - Mail to Groups: ☐
  - Post document to Groups: ☐
  - Post document to Users: ☐
  - Casenote security**: ☒ Yes ☐ No (highlighted with a red box)
  - Details** button (next to Casenote security)
- Login Information** (expandable)

On the right side of the Security Information section, there are links for **User Management** (with a help icon), **Financial Management**, and **Placement Management**.