



Care  
FOLK  
PRO

# Notes



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## Your Notes Explained

Do you need somewhere to jot down a reminder or an observation about a client?

You can simply record these using the **Notes** feature!

Your notes allow you to record private reflections on a Client or simply keep everything organized via your profile. And the best bit is that you will always have it with you no matter where you are.

You can document an interaction with a Client on their profile which can be viewed by other Carers or a Manager. Chronicle clinical observations on their progress or other details gathered while monitoring them.

As a Manager, you can keep confidential HR notes about an employee. Include details from a performance review or a quick reminder about scheduling preferences.

Organize your Notes with the preset Categories or tags so they are easy to find when you need them.

**Let's explore Notes more!**

### Makes Notes Work for YOU

- ✓ HR & Care Management Notes
- ✓ Private Clinical Observations
- ✓ Reduces Paper Use
- ✓ Accessible from anywhere

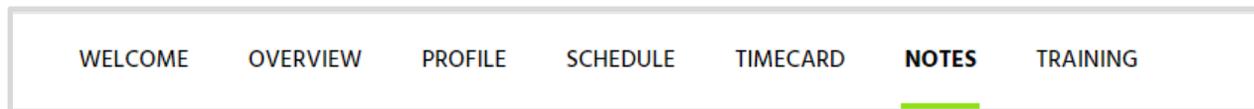
## 2 Notes

### Finding the Notes Page



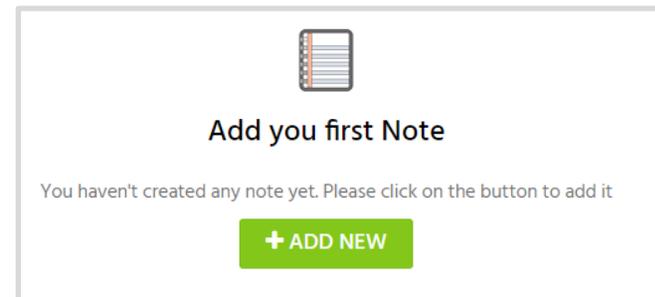
### Find the Notes Page on a Profile

Keep notes for yourself on your own Profile or about a Client on their profile. Managers can also record notes about a Carer employee on their profile. You can find the Notes page on any profile by navigating to the **Profile** and choosing **Notes** from the top bar.



### Add a New Note

Try it out, it's quick and easy! Select **+Add New** for your first note.



# 3

## Notes

### Create a New Notes

#### Create a New Note

Type in a **Subject**, then choose a **Category** from the dropdown.

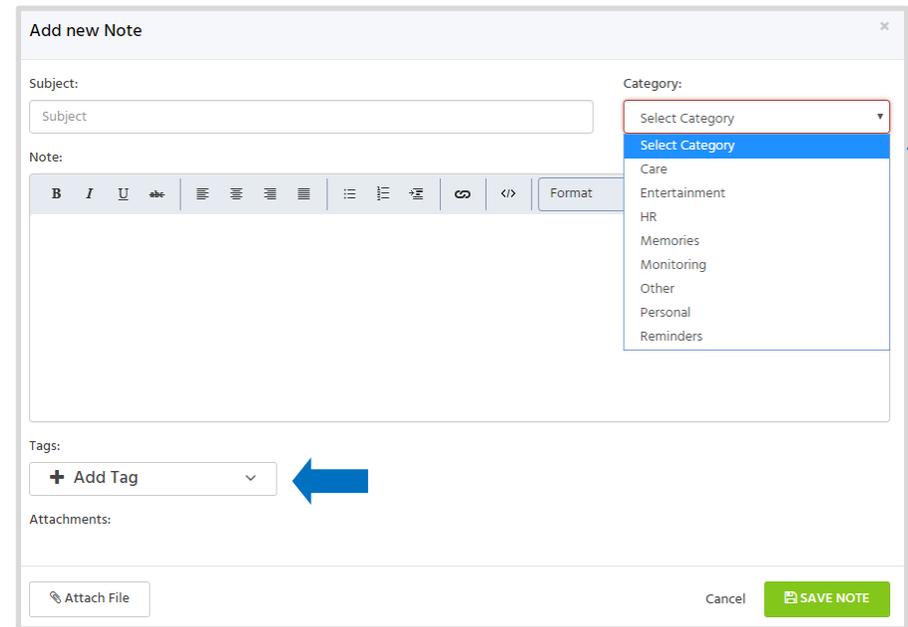
**Note:** Categories make it easier to find notes in the future. The HR category is only available and visible to Managers.

Type out your **observation, thought or any information** that might be useful. Use the formatting tools included to make your text bold, left or right aligned or adjust size.

For additional organising, add a **Tag** by clicking **+Add Tag**. Type this into the search box or scroll to browse through tags and select one from the list.

You can also add a **document** or **photo** by selecting **+Attach File**. Choose a file from your computer and then click **Open**.

When finished, select **Save Note**.

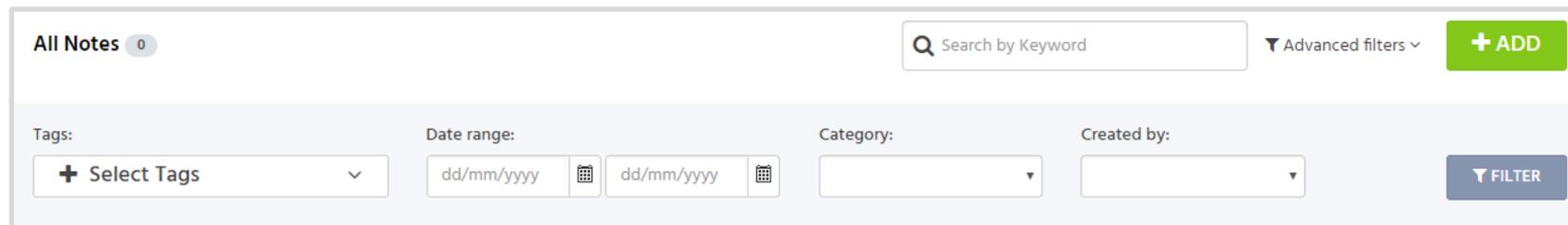


### Search Notes

It's easy to find previous Notes when you need them. For most options, select **Advanced Filters** and then search by:

- Typing a **Keyword** into the search box
- Selecting a **Tag** from the Tags dropdown menu
- Choosing a range of **Dates** by typing in the actual date or by using the calendar to select dates
- Selecting a **Category** from the Category dropdown menu
- Choosing the author's **name** from the **Created By** dropdown menu.

For example, to see all notes related to the Care plan, either type "Care Plan" into the keyword search or choose "Care" from the Category dropdown.



The screenshot shows a search interface with the following elements:

- All Notes** 0
- 
- Advanced filters** ▼
- + ADD** (green button)
- Tags:**  ▼
- Date range:**   (with calendar icons)
- Category:**
- Created by:**
- FILTER** (blue button) ← **Blue arrow pointing to the FILTER button**

### Who Can View Notes?

- **Only you** can view the Notes you create within **your own profile! There is no exception.**
- Carers, Managers, and Admins (not Family) can view notes created on a Client's profile.
- Care Managers and Admins can view Notes created by themselves on Carers Profiles. Carers cannot see these notes.
- Only Care Managers can create and view Notes within the HR category.