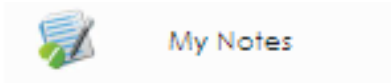


My Notes

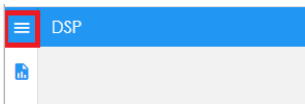


Q: What are My Notes?

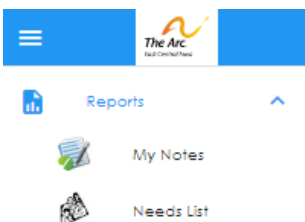
A: My Notes will show all notes that you have submitted. You can use My Notes to edit documentation afterwards or check how many services you provided and to which individuals. There is an option to adjust the date range for certain days, weeks, and beyond. My Notes is a helpful tool when you forget to add information like a goal or support.

How to open the My Notes report:

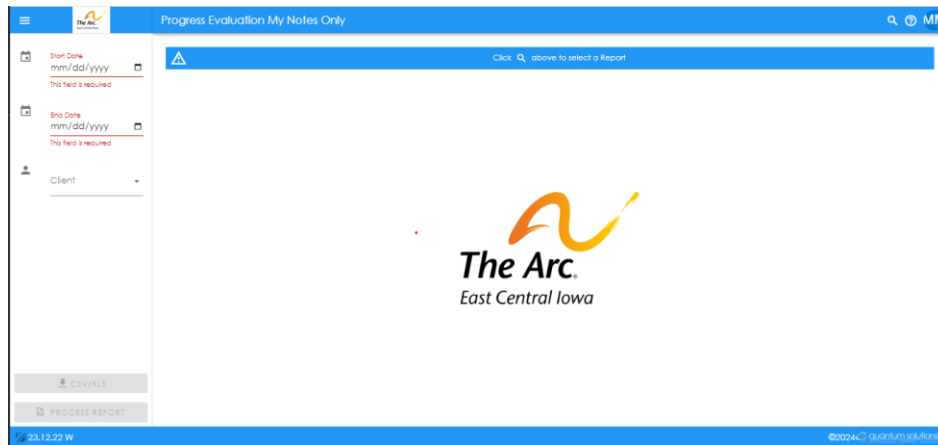
The report is hidden in the side panel menu on the far-left side of the screen. Look for the Dashboard name (**DSP/Adult Services/Site Based Services**) in the header panel. There are three bars to the left.



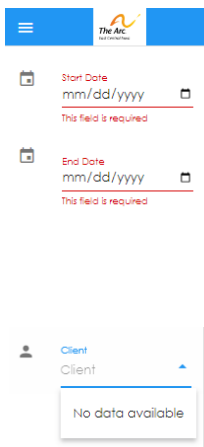
When you click on the icon, the link will appear. Click on the title Reports and then pick My Notes from the list.



A new screen will appear, and this will be blank with the Arc logo in the center. You will need to enter a start date/end date and click on Process Report. There is an option to select the participant's name if you are looking for specific notes.



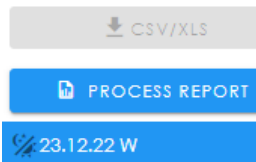
How to change the date range:



Type the date using *mm/dd/yyyy* format or use the calendar selector for both Start and End Date. After you complete this step the Process Report button will turn from gray to blue.

How to change the participant's name:

Click on the field named Client underneath the date selector. You will see a message 'No data available' Type either the first or last name and click on the correct option.



How to populate My Notes:

Click on the Process Report button in the bottom left-hand corner of the screen. It will be above the date in the footer panel. After a brief loading message, the list of notes will appear.

Progress Evaluation My Notes Only

Client	Staff	Date	Start	End	Duration	Activity	Source DB	
Someone New	Mary Miller	01/04/2024	08:51 AM	09:05 AM	0:14	Daycare Grp Private Pay-FMC	1/5/2024 6:13:29 AM-3J\$551	
Someone New	Mary Miller	01/05/2024	06:01 AM	06:10 AM	0:09	SVC Private Pay Group	1/5/2024 6:10:52 AM-3J\$576	
Mary Poppins	Mary Miller	01/05/2024	08:45 AM	11:55 AM	3:10	Daycare Private Pay	1/5/2024 12:57:34 PM-3J\$629	
Mary Poppins	Mary Miller	01/08/2024	08:27 AM	11:05 AM	2:38	SVC Private Pay Group	1/8/2024 11:57:00 AM-3J\$973	
Mary Poppins	Mary Miller	01/12/2024	10:00 AM	02:00 PM	4:00	InHome Respite Group	1/12/2024 3:51:51 PM-3J\$269	
Mary Poppins	Mary Miller	01/15/2024	12:30 PM	02:30 PM	2:00	SCL	1/16/2024 8:29:08 AM View Detail	
TEST CONSUMER	Mary Miller	01/05/2024	08:07 AM	11:49 AM	3:42	Daycare Grp Private Pay-Full Day	1/5/2024 1:30:26 PM-3J\$587	
TEST CONSUMER	Mary Miller	01/08/2024			0:00	Meet and Greet SVC	1/8/2024 12:47:52 PM-3J\$127	
TEST CONSUMER	Mary Miller	01/08/2024	07:00 AM	09:30 AM	2:30	Daycare Respite - Individual	1/8/2024 2:14:31 PM-3J\$759	
TEST CONSUMER	Mary Miller	01/08/2024	08:00 AM	11:00 AM	3:00	SVC Respite Group	1/8/2024 12:04:28 PM-3J\$304	

CSV/XLS PROCESS REPORT

Rows per page: 10 1-10 of 21

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How to open a note:

= View Detail = View History

You will hover the mouse over that note and the row will appear slightly gray. Click on the pencil icon, it is a link to view detail on the note. The clock icon will link to the history of when the note was started and changed.

After a brief loading message, the note will appear on the screen. Click on the Finish button to save any changes to the documentation. If the note is locked and you wish to make changes, contact your supervisor. If no changes are needed, you can close the web page at the top of the screen and return to My Notes.

To exit the report, close the web page. You will return to the dashboard.