SCSEP GPMS

Case Notes Quick Start Guide

GPMS users can now add **Case Notes** in individual participant records. This quick start guide will provide an overview of the Case Notes functionality.

Accessing Case Notes

To access case notes:

1. Navigate to an individual participant.
2. Navigate to the *Case Notes* tab.
3. Below the participant summary, a table with any existing case notes will display.

Add a New Case Note

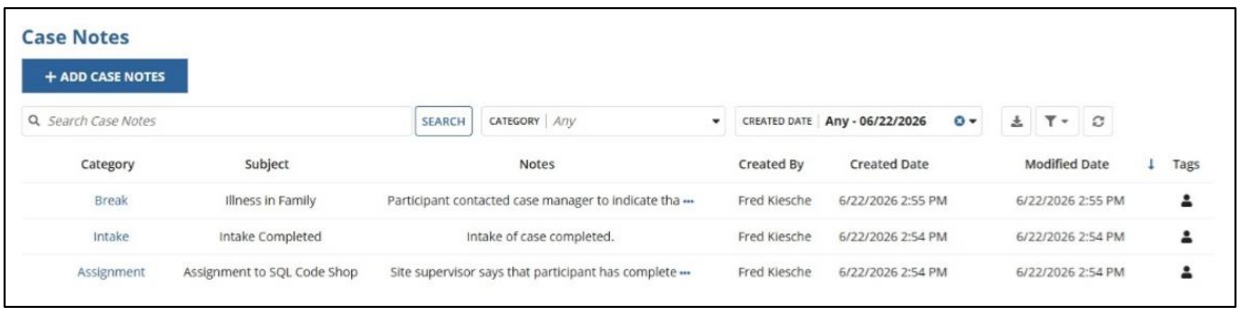
To add a new case note:

1. Click **Add Case Notes** above the summary table. The following fields will appear:
   a. **Category:** Select a category to which the case note pertains. The choices match actions within the GPMS, such as assignment, exit, or waiver. This field is required to save the record.
   b. **Subject:** Add a subject for your case note. You may enter up to 250 characters. This field is required to save the record.
   c. **Notes:** Add any descriptive text for your note. You may enter up to 2,000 characters. This field is required to save the record.

d. **Tag:** Tag a user for case note notifications. The user must have access to the participants for Grantee and Subgrantee. This is an optional field.

2. To save the case note, fill out the required fields and select **SAVE**. Select **CANCEL** to discard any changes to the Case Note.

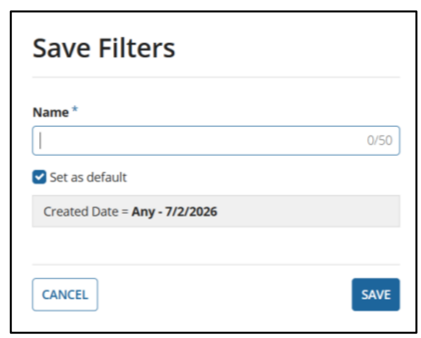
3. After saving, the summary screen will appear, and the new case note record will appear in the **Case Notes** table.



Category	Subject	Notes	Created By	Created Date	Modified Date	Tags
Break	Illness in Family	Participant contacted case manager to indicate tha ...	Fred Kiesche	6/22/2026 2:55 PM	6/22/2026 2:55 PM	
Intake	Intake Completed	Intake of case completed.	Fred Kiesche	6/22/2026 2:54 PM	6/22/2026 2:54 PM	
Assignment	Assignment to SQL Code Shop	Site supervisor says that participant has complete ...	Fred Kiesche	6/22/2026 2:54 PM	6/22/2026 2:54 PM	

View Existing Case Notes

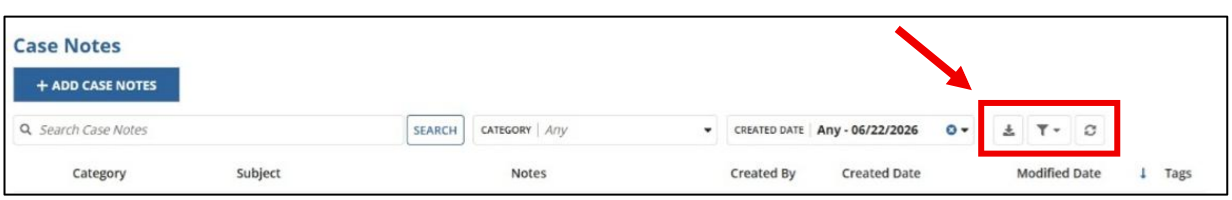
To review Case Notes, you can sort and filter the Case Notes in the summary table:



1. **Sort**: To sort each column of the Case Notes in ascending or descending order, click on the column title.

2. **Search and Filter**: To search and filter for specific Case Notes, you can use the **Search** field, the **Category** dropdown list, or the **Created Date** dropdown list.

There are three icons at the top-right corner above the summary table, allowing you to download the Case Notes as an Excel file, manage filters, and refresh the page:



- **Download icon:** Selecting the download icon will export all Case Notes and fields in the table based on current filters applied. The export will include the full text in the Notes field.
- **Filter icon:** Selecting the filter icon allows the user to name and save the currently applied filter (e.g., a search term plus a category) to easily reuse. Users can set this filter as the default filter used to view the **Case Notes** table.
- **Refresh icon:** Selecting the refresh icon refreshes the **Case Notes** table, keeping any existing filters applied.

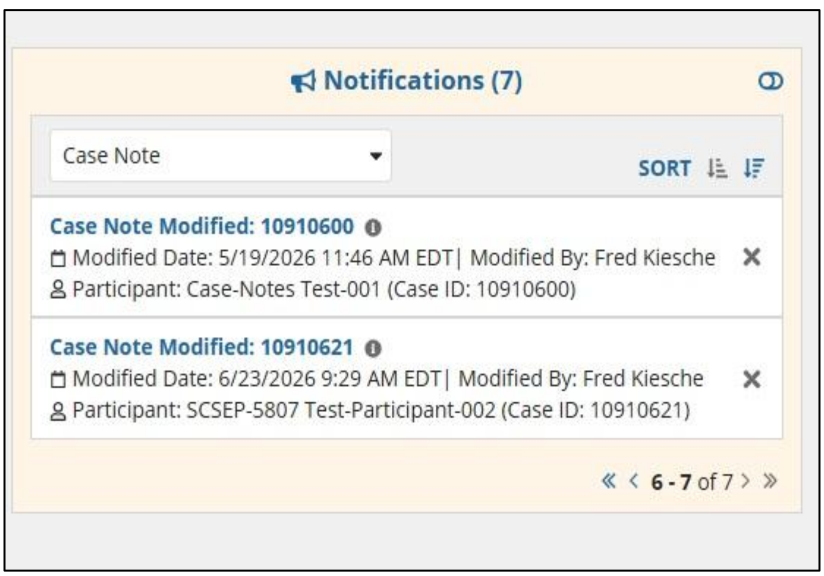
Edit Existing Case Notes

To edit a Case Note:

1. Select the individual record in the **Case Notes** table using the Category link.
2. Navigate to the case note, where you can update any of the fields in the note.
3. Select **Update** to save your changes or **Cancel** to revert to the original Case Note.

Case Note Notifications

When a person is tagged in a Case Note, they will be notified when a new Case Note is added to the participant's record, or when an existing Case Note has been edited.



The notification appears in the notifications panel after selecting the **My Tasks** tab. You can now filter the **Notifications Type** dropdown list by **Case Note**, in addition to other categories.

Clicking on the Case Note in the notifications panel on the *My Tasks* screen navigates the user to the *Participant Summary* screen, where they can select the *Case Notes* tab to view the update.