HT21: HOW TO RECORD A CASE SESSION ACTIVITY

> Session activities may be recorded by the primary case worker assigned to support the client and other team members who support the client.
>
> Once a case management file has been opened, session activities can be entered as Case Sessions.

1. Search for the client and click on their name to enter their file. If serving a family, navigate to the Family Head's file.

2. Click on the Client Management drop-down menu and select Case Management.

   Client Management ▾

3. For the Open record, select Display under the Action column.

4. Under the Sessions tab, click the Add Session button:

5. In the Activity field, select the main activity / service provided. If you helped broker or navigate client access to another agency or in-house program, select the relevant 'Referral' value.

6. Record the Date and Time the activity occurred, or service was provided.

7. Record the amount of time expended to provide the service.

8. Record the name of the staff person who provided the service. This may be the primary case worker assigned to the client, or another team member, depending on who provided the service. In general, if you are recording the case activity, this should be you.

9. If your Activity is one of the 'Referral' values, use the Agency Involved / Referral field to specify where the client was referred to.

10. If the Client was present for the service, change the Client Present toggle to YES.

11. If Family Members attached to the case file were present for the service, change the Family Members Present toggle to Yes.

12. Click the Save button.