

Schedule Notes contain specific information about a visit. If a note exists, it should be viewed before the visit. Notes may be viewed on the Calendar, Today, and Time Entry screens.

Scheduling Notes

Schedule Notes are added on the Calendar. They may be viewed by tapping the visit before the visit is started or on the **Day** screen. Once **Start Visit** has been tapped, the Notes may also be viewed on the **Today** or **Time Entry** screen. The note may only be edited before the visit is started.

➤ Viewing Schedule Notes on the Calendar

STEP 1: Open Calendar.

STEP 2: To view all Notes for your visits today, Tap **Day**.

STEP 3: To view a Schedule note before the visit is started, tap on the visit then scroll to the end.

➤ Adding Schedule Notes on the Calendar

STEP 1: Open visit on the **Calendar**.

STEP 2: Scroll to the end of the page.

STEP 3: Add or edit in the **NOTES** box.

➤ View Scheduling Note on the Time Entry screen

- This is read only and cannot be edited.

STEP 1: Open **Time Entry**.

STEP 2: Tap the visit in the left column.

STEP 3: Tap **Notes** at the top right.

➤ View Scheduling Note on the Today screen

- This is read only and cannot be edited.

STEP 1: The word **Notes** will appear in the **Staff Information** box if there is a Schedule Note.

STEP 2: Tap **Notes** to view the Schedule Note.

