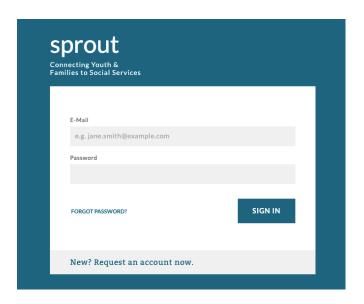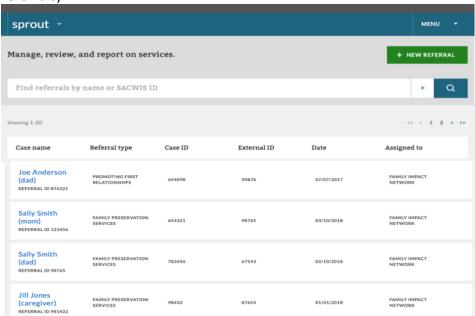# Entering Case Notes (Checklist Info) in Sprout
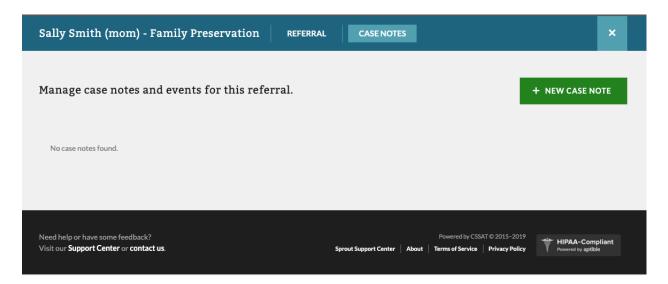
1. Go to https://sproutservices.org and log in with your email and password

2. You will see your agency's Referral list once you log in.
a. Case Name is the case name from the Referral. Who the referral is for is listed in parentheses (ex. Mom, Dad, Caregiver)
b. Referral Type shows what kind of service is being done.
c. Case ID is the Famlink Case ID
d. External ID is the FIN Billing Number
e. Date is the date on the Referral
f. Assigned To is the agency the Referral is assigned to (you'll only see your agency's referrals)

3. Select the Referral you would like to enter data for. It will open into the "Case Notes" Screen

Sally Smith (mom) - Family Preservation   REFERRAL   CASE NOTES   ✕

Manage case notes and events for this referral.   **+ NEW CASE NOTE**

No case notes found.

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4. Select New Case Note

+ NEW CASE NOTE

5. Select a choice from the "Entry Type" dropdown box (Service Confirmation, Initial Contact, First Face to Face Meeting)

Entry Type *

✓ Select a type...
Service Confirmation
Initial Contact
First Face to Face Meeting
Weekly Meeting
End of Service

Notes

6. Once you select a choice you will see a "Contact Method" dropdown and "Was Contact Successful" choice appear. Please fill in with information.

     a. If you are documenting an attempt, you would select "No" for "Was Contact Successful" and enter what your attempt was in the notes box.
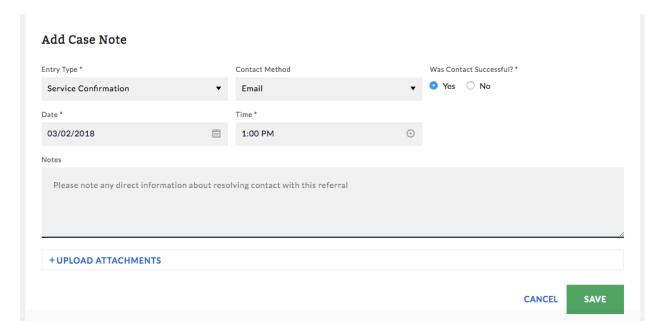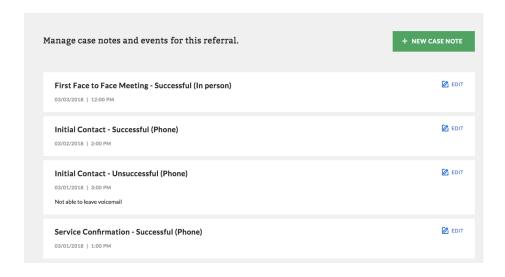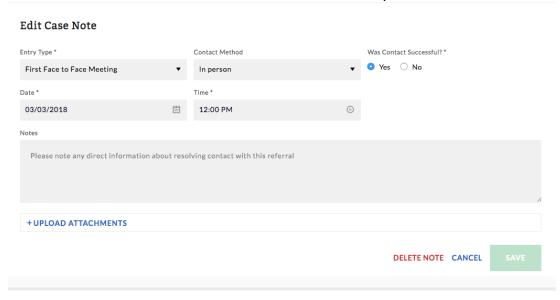
     b. "Date" and "Time" fields are required as this is how your data is calculated

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Add Case Note

Entry Type *	Contact Method	Was Contact Successful? *
Service Confirmation ▾	Email ▾	● Yes ○ No

Date *	Time *
03/02/2018	1:00 PM

Notes

Please note any direct information about resolving contact with this referral

+ UPLOAD ATTACHMENTS

CANCEL   **SAVE**

---

7. At this time you are required to enter "Service Confirmation," "Initial Contact" and "First Face to Face Meeting."

     a. FIN will be entering "Weekly Contact" and "End of Service" notes.

8. Here is an example of what you will see after entering data

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Manage case notes and events for this referral.   **+ NEW CASE NOTE**

First Face to Face Meeting - Successful (In person)   ✎ EDIT
03/03/2018 | 12:00 PM

Initial Contact - Successful (Phone)   ✎ EDIT
03/02/2018 | 2:00 PM

Initial Contact - Unsuccessful (Phone)   ✎ EDIT
03/01/2018 | 3:00 PM
Not able to leave voicemail

Service Confirmation - Successful (Phone)   ✎ EDIT
03/01/2018 | 1:00 PM

9. You can make edits or delete a note if needed. Click the Edit box on the note you would like to edit.

        a. You can make an edit and then select Save

        b. You can select "Delete Note" if it was entered by mistake

Edit Case Note

Entry Type *	Contact Method	Was Contact Successful? *
First Face to Face Meeting ▼	In person ▼	● Yes ○ No

Date *	Time *
03/03/2018 📅	12:00 PM 🕐

Notes

> Please note any direct information about resolving contact with this referral

+ UPLOAD ATTACHMENTS

DELETE NOTE   CANCEL   SAVE

11. You can search for Referrals with the Search Bar

        a. You can search by Name, Case ID, or Referral ID by typing that info into the search bar

        b. You can search by "Referral Type" or "Referral State" by selecting the +

        c. Once a case is Resolved it no longer shows up in the list, if you need to find a Resolved referral you would use the search bar and use the "Referral State" filter of "Resolved."

        d. A Referral is resolved once an "End of Service" note is entered. FIN will enter these notes from the End of Intervention Summary that is submitted with billing info.

Manage, review, and report on services.   **+ NEW REFERRAL**

Find referrals by name or SACWIS ID   + 🔍

Add Filters   ✕

> **REFERRAL TYPE**   RESET

> **REFERRAL STATE**   RESET

RESET ALL FILTERS   **APPLY**

10. You can view the Referral by selecting "Referral" at the top of the screen. FIN enters this information from the paper referral. At this time "Assessment Info" is not entered into Sprout.

Joe Anderson (dad) - Promoting First Relationships   REFERRAL   CASE NOTES   ×

Basic Details   ✎ EDIT

Referral details	SACWIS Referral ID: 876321 State: Accepted Referral date: 07/07/2017 External ID: 90876
Resource specialist	Chestnutt, Jamie Phone: 509-309-3451
Service Information	Reason for referral: Parenting Skills/Knowledge Notes: This is the box that has Service Goals from the referral.
Case details	Case ID #654098: Anderson (dad), Joe
Social worker	Potter, Sam potters@dshs.wa.gov Phone: 509-555-2345 Spokane (714) Program Type: CPS
Social worker supervisor	Banks, Lilly Phone: 509-555-6789

Child Details   ✎ EDIT

Child Details	Anderson, Billy (456773) DOB: 01/01/2018 Male Ethnicity: Not Hispanic or Latino	Race: White/Caucasian 123 W. 1st St Spokane, WA 99205 Phone: 509-555-4673 Language: English
Notes	This is where additional notes from the referral are listed.
Parent / Guardian Details	Anderson, Joe Relationship: Parent 123 W. 1st St Spokane, WA 99205 Phone: 509-555-4673 Language: English

Assessment Info   ✎ EDIT