

# FILE NOTES

You can create File Notes to document important information, conversations or emails that occur between you and your parents and children.

This may be initiated in either the Parent/Guardian and/or Child record.

This tip sheet will walk you through:

- Accessing messages
- Create a file note
- View and edit file notes
  - View
  - Edit
- Search and Print file notes
  - Search
  - Print
  - Sample

## Summary

1. Child on the child care menu
2. Select either parent/child/educator options
3. Use search option to find the record, then click edit
4. Click on the file notes tab
5. Click on Create
  - a. Select from either/or Educator, Parent, Child, Fieldworker
  - b. Enter body and subject
  - c. Tick flag if you wish
  - d. Click Save

# FILE NOTES

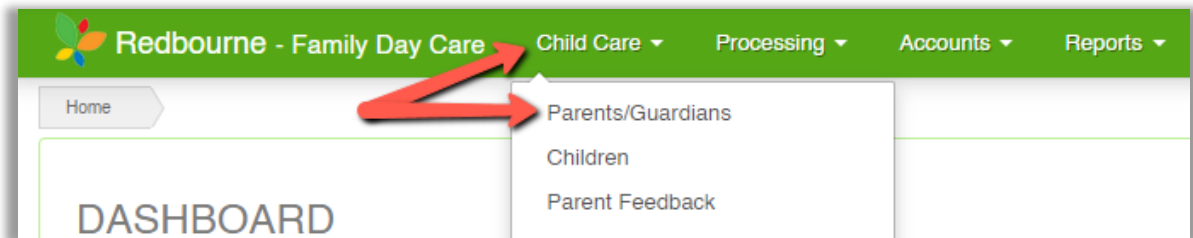
## Detailed

### Accessing messages

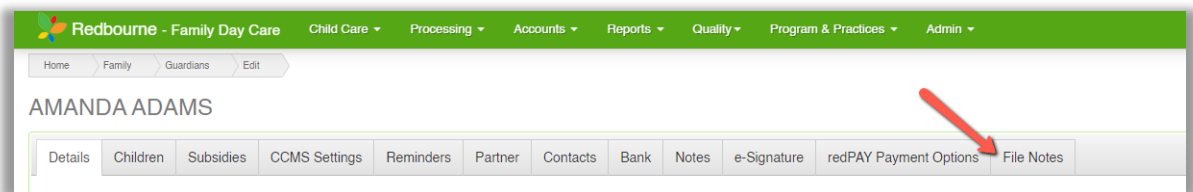
File notes can be accessed in multiple areas throughout the software. No matter where you create the note, the process is the same:

### Parent/Guardian

Click on the Child Care menu and select Parent/Guardian:



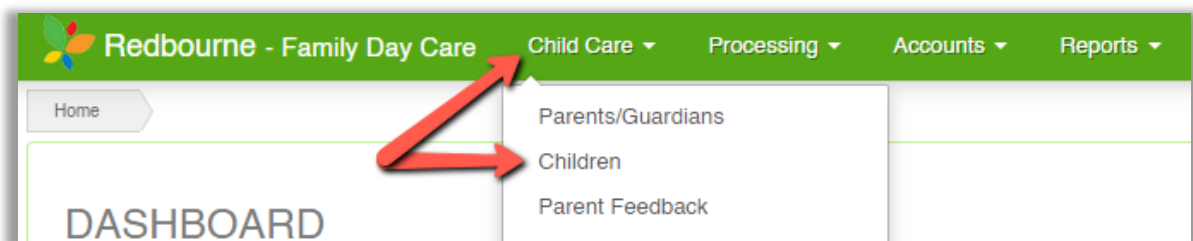
Navigate to the parent record and click on the file notes tab:



Any file notes relating to the Parent/guardian will display here.

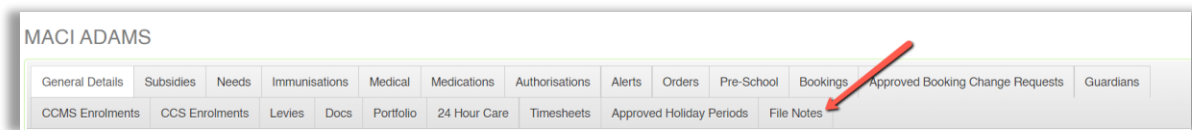
### Children

Click on the Child Care menu and select Children:



Navigate to the child record and click on the file notes tab:

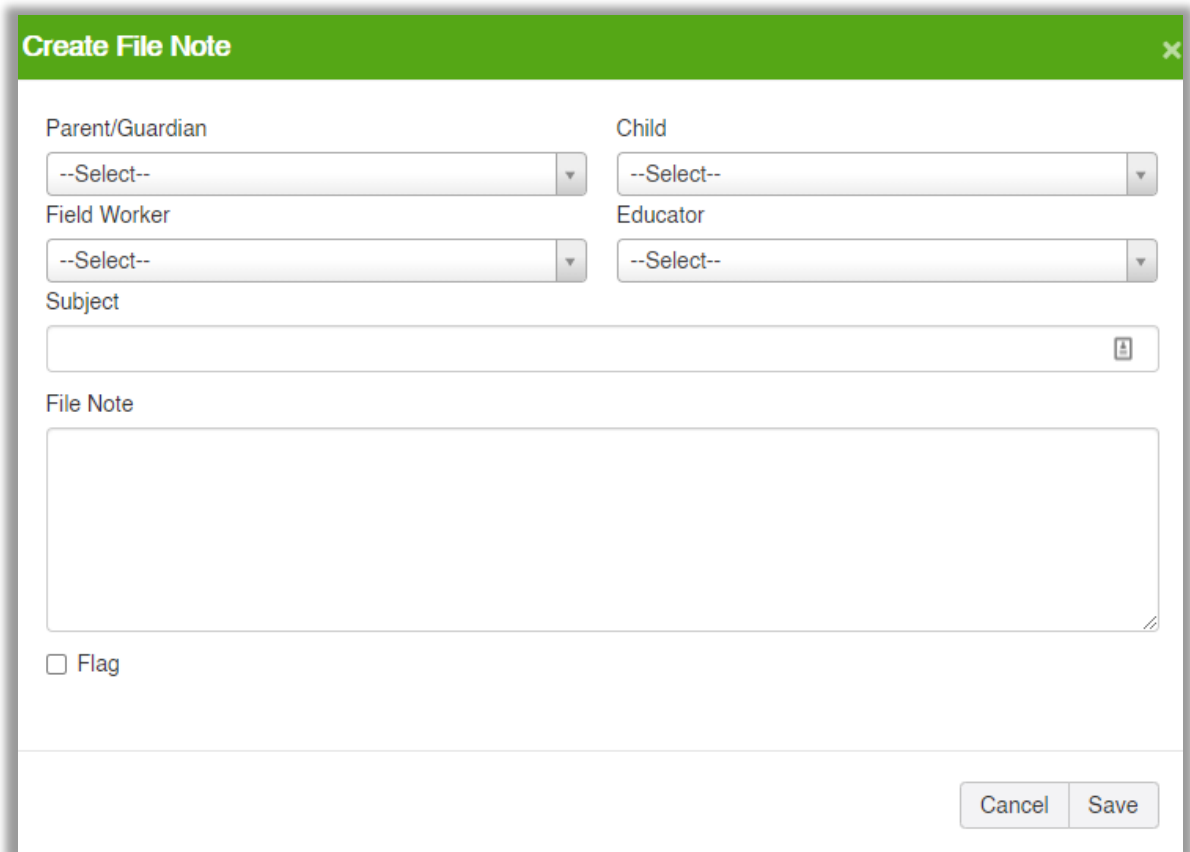
## Detailed cont.



Any file notes relating to the child will also display here.

### Create a file note

While in each of these areas you will be able to create new file notes. To do this click on the Create New File note button and the following window will open:



The 'Create File Note' dialog box contains the following fields and controls:

- Parent/Guardian:** A dropdown menu with "--Select--" as the current selection.
- Child:** A dropdown menu with "--Select--" as the current selection.
- Field Worker:** A dropdown menu with "--Select--" as the current selection.
- Educator:** A dropdown menu with "--Select--" as the current selection.
- Subject:** A text input field with a small icon on the right side.
- File Note:** A large text area for entering the note content.
- Flag:** A checkbox labeled "Flag".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

**Parent/Guardian:** If a parent is selected only the children assigned to this parent will display in the child drop down menu.

**Child:** If a child is selected only the parent/guardians assigned to this child will display in the 'parent' drop down menu.

**Field Worker:** You may select a field worker. The list of field workers generates from your set up.

# Detailed cont.

**Educator:** You may select an active educator the file note relates to.

**Subject:** Free text field to enter a brief description.

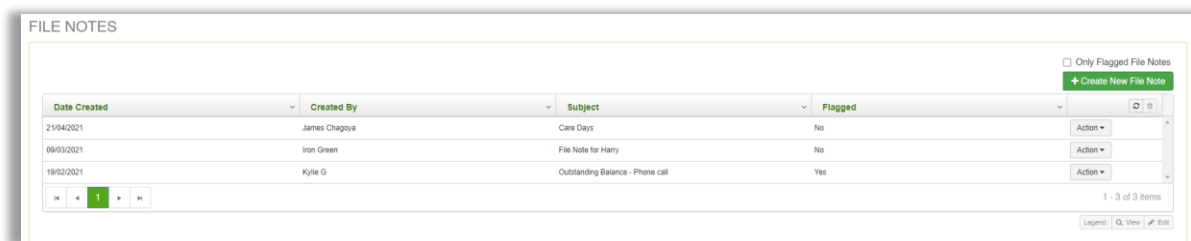
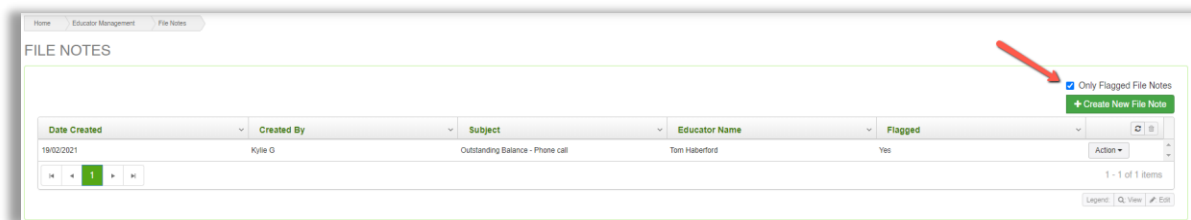
**File Note:** Free text field to enter more details.

**Flag:** You may flag notes of importance, or notes you need come back later to action.

## View and Edit File Notes

You may view and edit file notes all within the parent/guardian, child, educator records. The records which display in the table will relate the person (Educator, Parent/Guardian or Child) whose record we are currently accessing.

Upon entering the page, the default view is to only display **flagged file notes**, untick this option to see all file notes:

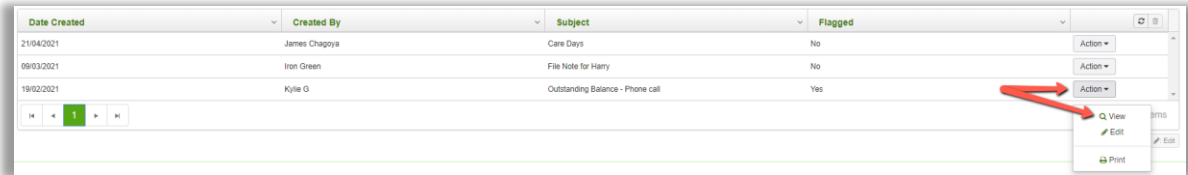


# Detailed cont.

## View file notes

To view file notes, click on the action button and select **view**:

Date Created	Created By	Subject	Flagged	Action
21/04/2021	James Chagoya	Care Days	No	Action
09/03/2021	Iron Green	File Note for Harry	No	Action
19/02/2021	Kylie G	Outstanding Balance - Phone call	Yes	Action



The view file note window will open in view mode:

**View File Note** ✕

Parent/Guardian

Field Worker

Child

Educator

Subject

File Note  

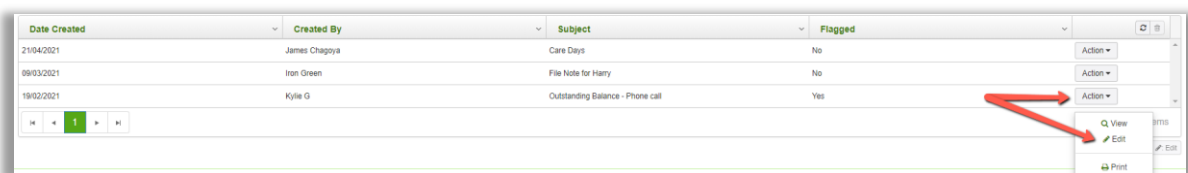
Alana has an outstanding balance with Tom, and Tom is unable to sort this out.  
  
 I called Alana regarding her balance and while she was hostile to begin with we were able to discuss why she hasn't been able to pay (family issues, finance issues).  
  
 We discussed a payment plan and what happens if she misses payments. I have put all of this in writing and

Flag

## Edit file notes

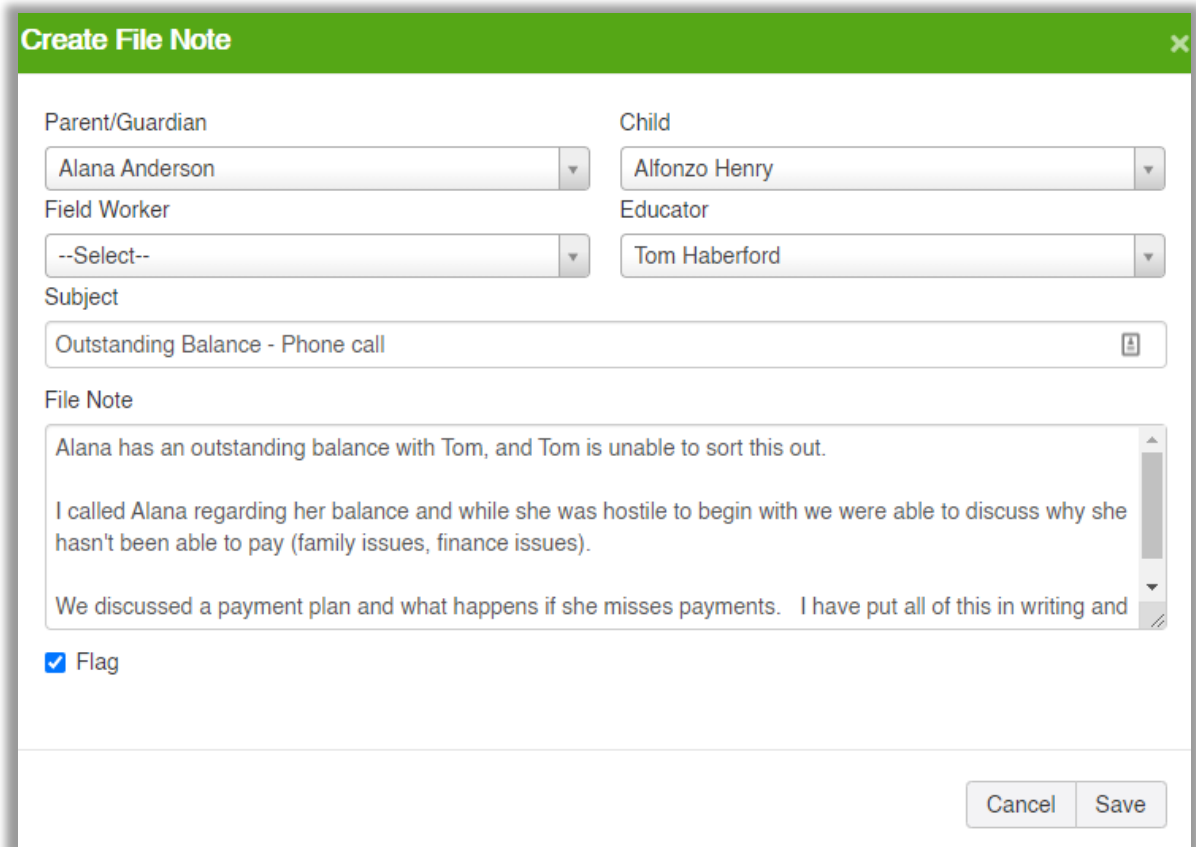
To edit file notes, click on the action button and select **edit**:

Date Created	Created By	Subject	Flagged	Action
21/04/2021	James Chagoya	Care Days	No	Action
09/03/2021	Iron Green	File Note for Harry	No	Action
19/02/2021	Kylie G	Outstanding Balance - Phone call	Yes	Action



# Detailed

The view file note window will open in edit mode and therefore you will be able to make changes as required:



## **Search and Print file notes**

You may search and print file notes all within the parent/guardian, child, educator records. The records which display in the table will relate the person (Educator, Parent/Guardian or Child) whose record we are currently accessing.

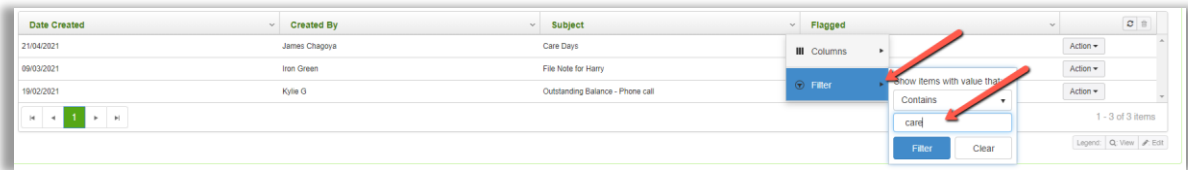
## **Searching file notes**

You may search for file notes using the column headers:



Click the arrow on each column will provide you with search options. You may select the filter option to type in a keyword:

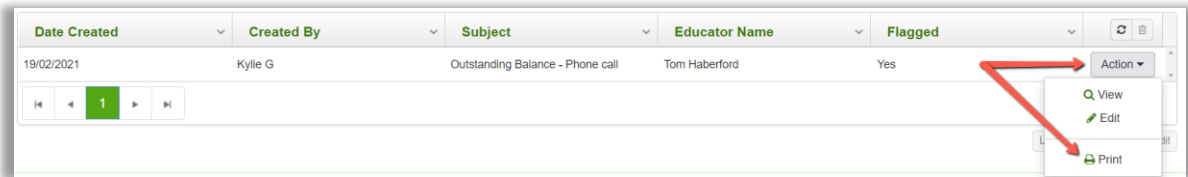
# Detailed cont.



Once you click the **Filter** button, only file notes relating to your search will display.

## Printing file notes

To print file notes, click on the **action** button and select **print**:



Your report will download into a PDF file, where you can print or save the document from here.

## Sample

Mothers Choice Family Day Care Redbourne Business Services Offices 22 Lakeview Drive Ascot QLD 4032 07 2431 2341	ABN: 1234 Approval ID: 190005261V
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**Redbourne Choice Family Happy Day Care PTY LTD**

### File Notes

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Date Created: 22/04/2021 Parent/Guardian: Alana Anderson Field Worker: Subject: Outstanding Balance - Phone call File Note:	Created By: Kylie G Child: Alfonzo Henry Educator: Tom Haberford
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Alana has an outstanding balance with Tom, and Tom is unable to sort this out.

I called Alana regarding her balance and while she was hostile to begin with we were able to discuss why she hasn't been able to pay (family issues, finance issues).

We discussed a payment plan and what happens if she misses payments. I have put all of this in writing and emailed it to Alana as proof of our conversation.