QA – Case Notes

1. How do I complete Sampling?

   Click on the down arrow beside Microsoft Dynamics CRM in the Navigation Bar and then click on the Case Note tile. The Sampling button will be highlighted if there are Case Notes in Ready to Review status which haven't been sampled. Once you have confirmed your request to perform a sample on Ready to Review Case Notes a sample will be generated. The number of Case Notes in the sample depends on the percentage the county has determined should be manually reviewed. For example, if there are 100 records in Ready to Review status and the County Case Note review percentage is set at 20%, then 20 Case Notes MUST be manually reviewed and moved to Ready to Process status.

   A Bill File cannot be generated nor can Case Notes be Bulk Approved until ALL Case Notes sampled as needing to be Manually Reviewed have been set to Ready to Process.

2. What is required to Manually Review a Case Note?

   After running the Sampling process, click on the down arrow beside Active Ready to Review Case Note and click on Case Notes For Pending Manual Sampling Records. All Case Notes that must be manually reviewed must individually be reviewed and either the Case Note Status set to Ready to Process or returned to the SSA for correction by setting the status back to Draft.

3. How do I send a Case Note back to be corrected by SSA?

   When reviewing the Case Note, set the Case Note Status from Ready to Review back to Draft and enter the Reason. This will generate a Notification to the SSA who can then correct the Case Note and set it back to Ready for Review.

4. Can I review Case Notes sampled and set to Bulk Approved before generating the Bill file?

   Yes, click the down arrow beside the sub-grid title, which default is Active Ready To Review Case Notes, and change to Case Notes For Bulk Approve. All Case Notes sampled and ready for bulk approval will be listed.

   Open any Case Note by clicking in the blue area of the record.

5. Can I Revise/Correct a Case Note?

No, Case Note QAs cannot change anything on the note except the Case Note Status and Reason. Only those with the imagineIS SSA Role can edit the other fields on the Case Note.