SUDS
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Case Notes
SUDS User Guide

Case Note Records

Case Notes, ADRC , Care Plan Notes, Nutrition Service Notes, Provider Case Manager

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Case Note Records - What's a Note and What's a Record

Case Note Record Type refers to the system record type. The record type assigns a note name depending on the service and/or the user who rights the note. SUDS has six different case note record types: **Case Notes, ADRC, Care Plan Notes, Nutrition Service, and Provider Case Manager.**

One of the Case Note Record Types is called Case Notes, which is confusing. Case Notes have the least number of restrictions. Any user can create a Case Note on a client's record and anyone can view that note.

The remaining Case Note Record types are controlled by permission sets and can only be used by certain users.

- Nutrition Service: For Use by Dieticians
- ADRC: For Use by ADRC employees
- Provider Case Manager: For use by Providers providing Case Management
- Care Plan Notes: AAA Staff who provide Case Management

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Creating a Case Note
Creating a New Case Note

To create any kind of Case Note, navigate to the client record of the client you want to create a note for. Once you are on the client record, scroll down to Service Case Notes and Click New

New Service Case Note

Select a record type

- ● Care Plan Notes
- ○ ADRC
- ○ Case Notes
- ○ Nutrition Service Notes
- ○ Provider Case Manager

NOTE: If you do not have access to Care Plan, ADRC, Provider Case Manager or Nutrition Service Notes, they will not display as a selection.

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Case Notes

Case Notes for All SUDS Users

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Case Notes

Case Notes: Only use Case Notes for basic information like a client's previous address or client no longer receiving homemaker services.

All users in SUDS can see Case Notes, regardless of region or login credentials.

New Service Case Note

Select a record type

- ● Care Plan Notes
- ○ ADRC
- ○ Case Notes
- ○ Nutrition Service Notes
- ○ Provider Case Manager

⚠ Case Notes **are** HIPAA and PII compliant. All other case notes are HIPAA, PII protected and "hidden" from other users for additional security and privacy reasons.

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Case Notes

Case Notes have certain requirements, which include:

1. Client SUDS ID. This field will automatically populate the SUDS Client ID since you create a note from the client record.
2. The Date cannot be in the future.
3. The field labeled **Notes** is where you enter the client information.
4. Case Notes are searchable. Be thoughtful about your wording so you have keywords that you can search by.

System Information will auto-populate based on your login. This only applies if you are a single-region user.

ADRC

Options Counseling and Case Management

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ADRC Case Notes

ADRC Case Notes are created by ADRC Options Counselors who provide the following services:

1. Options Counseling
2. ADRC Case Management
3. ADRC Caregiver Case Management
4. ADRC Grandparent Caregiver Case Management.

New Service Case Note

Select a record type

- ○ Care Plan Notes
- ○ **ADRC**
- ○ Case Notes
- ○ Nutrition Service Notes
- ○ Provider Case Manager

⚠️ If you are an ADRC Options Counselor that also provides Case Management, please contact the SUDS Help Desk to ensure your permissions have been set up to allow use of both the ADRC and Care Plan Notes

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ADRC Case Notes

For an **ADRC Case Note**, the **SUDS Client ID** is required, but this will auto-populate since you are on the client record.

Date is required for the purposes of unit conversion and cannot be in the future.

Converted as a Service Unit is a read only field, which means it cannot be changed by a user. If the box is unchecked, a unit was not created. If the box is checked, a unit was created.

New Service Case Note: ADRC

* = Required Information

Information

Note Number	
*Client	Client-00126489
*Date	
Case Manager	Search People...
Other ADRC Counselor/Case Manager	
Converted As Service Unit	☐

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ADRC Case Notes: Options Counseling

Options Counseling: A person-centered approach to helping individuals gain an understanding of the benefits and limitations of long-term services and support options, and the knowledge to access these resources, in order to empower them to make choices that reflect their unique needs, values and circumstances.

ADRC Service Information

ADRC Service Type   --None--

✓ --None--

Options Counseling

Quick Call

Follow Up

Case Management

Caregiver Case Management

Grandparent Caregiver Case Management

Time Spent with Client

Billable Time with Client

Session Information

Notes

Options Counseling, Quick Call, and Follow Up will all create units for Options Counseling. The different options are for reporting purposes.

⚠️ Contact your AAA Admin to determine if you have Service Authorizations to provide Caregiver and Grandparent Caregiver Case Management Services.

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ADRC Case Notes

ADRC Case Management: Defined as assisting with the coordination of long-term care services, in circumstances where a person and/or their caregivers are experiencing diminished functioning capacities, personal conditions, or other characteristics which require the provision of services by formal service providers. Activities of case management may include: assessing needs, developing care plans, authorizing services, arranging services, coordinating the provision of services among providers, follow-up, and reassessment, as required.

ADRC Caregiver Case Management: Same service, but provided to Caregivers.

ADRC Grandparent Caregiver Case Management: Same service, but provided to Grandparent Caregivers

ADRC Service Information

ADRC Service Type | --None--

--None--
Options Counseling
Quick Call
Follow Up
Case Management
Caregiver Case Management
Grandparent Caregiver Case Management

Time Spent with Client

Billable Time with Client

Session Information

Notes

Options Counseling, Quick Call, and Follow Up will all create units for Options Counseling. The different options are for reporting purposes.

⚠ Contact your AAA Admin to determine if you have Service Authorizations to provide Caregiver and Grandparent Caregiver Case Management Services.

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ADRC Case Notes

Quick Call: Quick call is any phone call or information provided that is less than 15 minutes. **Voicemails are a good example.**

If you enter Quick Call, leave the Time Spent with Client blank. The units will automatically populate to 15 minutes.

Follow Up: Following up after the closure of Case Management to ensure that the client does not need additional help or services.

If you enter Quick Call and enter any amount of time higher than 0.25, SUDS will change the unit back to 0.25 for conversion.

ADRC Case Note

Billable Time with Client is the amount of time you want reimbursed for this interaction with the client.

If this case note is informational only (i.e., You added a professional contact) enter 0.00 as the **Billable Time with Client**.

Time increments are in 15 minute intervals up to 10.00 hours in accordance with ACL guidance.

Time Spent with Client

Billable Time with Client   ⓘ   --None--   ▼

Session Information

Notes

▼	--None--
	0.00
	0.25
	0.50
	0.75
	1.00
	1.25
	1.50

SUDS Service Definitions and Reporting Requirements

Hours: Partial hour may be reported to two decimal places in 15 minute increments (i.e. 0.25 = 15 minutes, 0.50 = 30 minutes, 0.75 = 45 minutes).

The minimum increment allowed is 15 minutes (0.25 of an hour)

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ADRC Case Note

The Session Results section is options, but directly ties back to ADRC Policy. We encourage the use of this section as it can help you create more in-depth reports about ADRC services. One drawback to only creating ADRC notes is that narrative is difficult to search, whereas if this section is used, you can create a quick Follow Up Report of your agency's clients.

Other Time Spend on Client is to include admin time spent making calls, documentation, etc. to help the client. This time is not included during reimbursement.

Nutrition Case Note

Nutrition Counseling

Nutrition Case Note

The only service that requires a Nutrition Case Note is Nutrition Counseling.

Information only nutrition case notes can be completed. *see next slide

A Nutrition Case Note requires the SUDS Client ID, which will auto-populate since you are on the client's record.

Date is required for the purposes of unit conversion and cannot be in the future.

Converted as a Service Unit is a read only field, which means it cannot be changed by a user. If the box is unchecked, a unit was not created. If the box is checked, a unit was created.

New Service Case Note: Nutrition Service Notes

* = Required Information

Information

Note Number

* Client: Client-00460479

* Date

Converted As Service Unit ☐

Session Information

Billable Time with Client: --None--

Cancel   Save & New   Save

Notes

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Nutrition Case Note

Billable Time with Client is the amount of time you want reimbursed for this interaction with the client.

If this case note is informational only (i.e., You added a professional contact) enter 0.00 as the **Billable Time with Client**.

Time increments are in 15 minute intervals up to 10.00 hours in accordance with ACL guidance.

Session Information

Billable Time with Client ⓘ	--None-- ▼
Notes	
Key Words	

✓ --None--	
0.00	
0.25	
0.50	
0.75	
1.00	
1.25	
1.50	

SUDS Service Definitions and Reporting Requirements

Hours: Partial hour may be reported to two decimal places in 15 minute increments (i.e. 0.25 = 15 minutes, 0.50 = 30 minutes, 0.75 = 45 minutes).

The minimum increment allowed is 15 minutes (0.25 of an hour)

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Nutrition Case Note

SMART Goals should be used to document individual client goals in SUDS, including potential barriers and client needs.

Case Closed and **Follow Up Needed** are optional fields to help users document entirety of the case management process.

Other Time Spend on Client should include admin time spent making calls, entering documentation, etc. to help the client.

Nutrition Case Note

If an internal or external **Referral** is made, it should be entered here. Any service for which the referral was made can also be selected here.

Hover over the "i" information icon to see a list of services associated with each checkbox.

SUDS does not automatically send the referral. You can use Tasks, Chatter, or send an email.

This section assists with documentation and reporting.

Referrals

No Referrals ☐		External Referral ⓘ ☐
Internal Referral ☐		External referral sent to: [ ]
Internal referral sent to: ⓘ [ ]		

System Information

	↺
Service Case Note Provider	💗 State Unit on Aging ✕
Owner	🕑 Sarah Barrett
Record Type	Nutrition Service Notes

⚠️ System Information shows the owner of the note, the note provider, and the type of note. In this case, a Nutrition Service Note.

Care Plan Notes

AAA Staff Case Management

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Care Plan Note

For a **Care Plan Note**, the **SUDS Client ID** is required, but this will auto-populate since you are on the client record.

Date is required for the purposes of unit conversion and cannot be in the future.

Enter the **Case Manager** and any other **ADRC Counselor** or **Case Manager.**

Converted as a Service Unit is a read only field, which means it cannot be changed by a user. If the box is unchecked, a unit was not created. If the box is checked, a unit was created.

New Service Case Note: Care Plan Notes

* = Required Information

Information

Note Number

* Client

Search Clients...

Complete this field.

* Date

Case Manager

Search People...

Other ADRC Counselor/Case Manager ⓘ

Converted As Service Unit

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Care Plan Note

The **Case Management Service Type** can be any of these three fields:
- Case Management
- Caregiver Case Management
- Grandparent Caregiver Case Management

The **Case Management Service Type** must be selected before a unit can be created from the note.

Case Management Service Information

Case Management Service Type

--None--

--None--

Case Management

Caregiver Case Management

Grandparent Caregiver Case Management

Session Information

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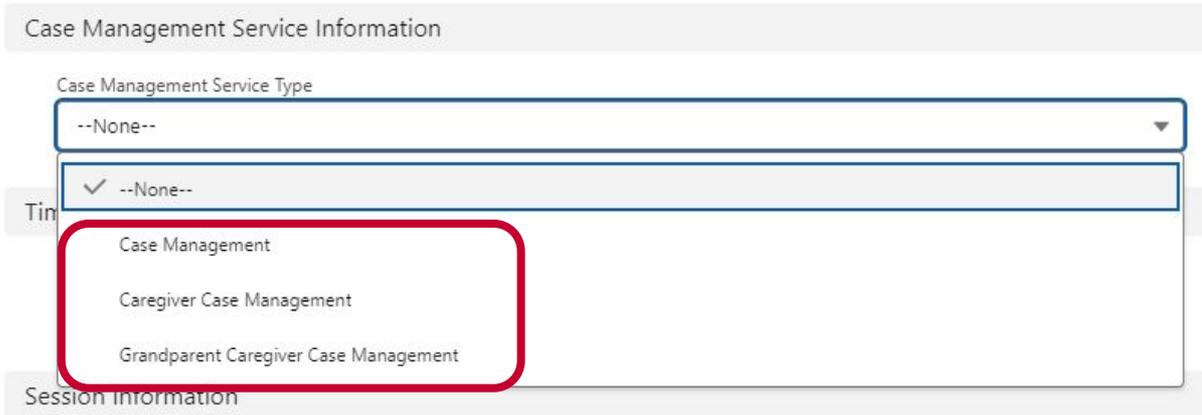
Care Plan Note

Billable Time with Client is the amount of time you want reimbursed for this interaction with the client.

If this case note is informational only (i.e., You added a professional contact) enter 0.00 as the **Billable Time with Client**.

Time increments are in 15 minute intervals up to 10.00 hours in accordance with ACL guidance.

Time Spent with Client

Billable Time with Client ⓘ

--None--

Session Information

Notes

SUDS Service Definitions and Reporting Requirements

Hours: Partial hour may be reported to two decimal places in 15 minute increments (i.e. 0.25 = 15 minutes, 0.50 = 30 minutes, 0.75 = 45 minutes).

The minimum increment allowed is 15 minutes (0.25 of an hour)

✓ --None--

0.00

0.25

0.50

0.75

1.00

1.25

1.50

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Care Plan Note

Action Plan should be used to document individual goals in SUDS

Case Closed and **Follow Up Needed** are optional fields to help users document entirety of the case management process.

Other Time Spend on Client should include admin time spent making calls, entering documentation, etc. to help the client.

Session Results

Action Plan

Follow Up Needed
☐

Key Words

Case Closed
☐

Other Time Spent on Client ⓘ

Case Closure Reason
--None-- ▼

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Care Plan Note

If an internal or external **Referral** is made, it should be entered here. Any service for which the referral was made can also be selected here.

You can use your mouse to hover over the information icon to see a list of services associated with each checkbox. This example are services related to Application Assistance.

SUDS does not automatically send the referral. You can use Tasks, Chatter, or send an email.

This section assists with documentation and reporting.

Referrals

Internal Referral

Internal referral sent to: ⓘ

External Referral

External referral sent to: ⓘ

No Referrals

Adult Day Care

Application Assistance ⓘ

SSI, SSDI, Medicaid, LTC Medicaid, HCBS, MSP, SNAP, OAP, Medicare, IHSV

Evidence Based Programs ⓘ

Financial ⓘ

Housing ⓘ

In Home Services ⓘ

Independent Living

Ombudsman

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Provider Case Manager

Provider Case Management

Provider Case Manager

For a **Provider Case Manager Note**, the **SUDS Client ID** is required, but this will auto-populate since you are on the client record.

Date is required for the purposes of unit conversion and cannot be in the future.

Enter the **Case Manager** and any other **ADRC Counselor** or **Case Manager.**

The **Service Case Note Provider** is required for unit conversion.

Converted as a Service Unit is a read only field, which means it cannot be changed by a user. If the box is unchecked, a unit was not created. If the box is checked, a unit was created.

New Service Case Note: Provider Case Manager

* = Required Information

Note Number

*Client

Search Clients... 🔍

Complete this field.

*Date

📅

Case Manager

Search People... 🔍

Other ADRC Counselor/Case Manager ⓘ

Service Case Note Provider

Search Providers... 🔍

Converted As Service Unit
☐

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Provider Case Manager

The **Case Management Service Type** can be any of these three fields:
- Case Management
- Caregiver Case Management
- Grandparent Caregiver Case Management

The **Case Management Service Type** must be selected before a unit can be created from the note.

Case Management Service Information

Case Management Service Type

--None--

✓ --None--

Case Management

Caregiver Case Management

Grandparent Caregiver Case Management

Session Information

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Provider Case Manager

Billable Time with Client is the amount of time you want reimbursed for this interaction with the client.

If this case note is informational only (i.e., You added a professional contact) enter 0.00 as the **Billable Time with Client**.

Time increments are in 15 minute intervals up to 10.00 hours in accordance with ACL guidance.

Time Spent with Client

Billable Time with Client ⓘ

--None-- ▼

Session Information

Notes

SUDS Service Definitions and Reporting Requirements

Hours: Partial hour may be reported to two decimal places in 15 minute increments (i.e. 0.25 = 15 minutes, 0.50 = 30 minutes, 0.75 = 45 minutes).

The minimum increment allowed is 15 minutes (0.25 of an hour)

✓ --None--

0.00

0.25

0.50

0.75

1.00

1.25

1.50

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Provider Case Manager

Action Plan should be used to document individual goals in SUDS

Case Closed and **Follow Up Needed** are optional fields to help users document entirety of the case management process.

Other Time Spend on Client should include admin time spent making calls, entering documentation, etc. to help the client.

Session Results

Action Plan

Key Words

Follow Up Needed

Follow Up Appointment

Date

Time

Case Closed

Case Closure Reason

--None--

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Provider Case Manager

If an internal or external **Referral** is made, it should be entered here. Any service for which the referral was made can also be selected here.

You can use your mouse to hover over the information icon to see a list of services associated with each checkbox. This example are services related to Application Assistance.

SUDS does not automatically send the referral. You can use Tasks, Chatter, or send an email.

This section assists with documentation and reporting.

Referrals

Internal Referral
☐

Internal referral sent to: ⓘ
[   ]

External Referral ⓘ
☐

External referral sent to: ⓘ
[   ]

No Referrals
☐

Adult Day Care
☐

Application Assistance ⓘ

Evidence Based Programs ⓘ
☐

Financial ⓘ
☐

Housing ⓘ
☐

In Home Services ⓘ
☐

Independent Living
☐

Ombudsman
☐

> SSI, SSDI, Medicaid, LTC Medicaid, HCBS, MSP, SNAP, OAP, Medicare, IHSV

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Editing and Sharing Case Notes

Editing Case Notes - All Case Note Record Types

Service Case Note
SCN-0000003

New Note | **Edit**

Related | **Details**

Note Number: SCN-0000003

Client: Client-00000255

Date: 9/21/2022

Case Manager:

Created By: Service AAA Region Manager, 9/21/2022, 9:50 PM

Owner: Service AAA Region Manager

Notes: The Force is not with Luke today. We are discussing adding more caregiver support services

Last Modified By: Service AAA Region Manager, 9/21/2022, 9:50 PM

Once you click Edit, the field on the note will "open" and allow you to make changes.

Be careful! This cannot be undone.

NOTE: You cannot edit another user's case note unless you have permission to do so.

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Case Note List Views

Case Notes Object from the App Launcher

An Alternate Way to Find Case Notes

If you want to review a **large summary of Case Notes** across many clients - Use the **App Launcher**.

1. Click on the App Launcher
2. In the Search Field, type in **Case Notes**
3. Click on **Service Case Notes**

Pre-made **List Views** have been created by case note record type. See our guide on How-To Create and Manage List Views.

Case Notes List Views

Example Case Note List View is SUDS

Service Case Notes
Case Notes ▾

50+ items • Sorted by Note Number • Filtered by All service case notes - Record Type • Updated a few seconds ago

		Note Number ↑ ∨	Client ∨	Date ∨	Created Date ∨	Notes ∨	Owner's Primary Provider ∨	
1	☐	SCN-0000000	Client-00151416	10/5/2022	10/5/2022, 8:12 AM	Set up OC/SUA for 10/6 at 11:00.	AdvantAge Health Resource Center	▾
2	☐	SCN-0000003	Client-00417360	9/30/2022	10/5/2022, 2:12 PM	Referral from CK	AdvantAge Health Resource Center	▾
3	☐	SCN-0000033	Client-00067317	10/7/2022	10/7/2022, 1:35 PM	Comments: Temp Hours for surgery recovery. Date: 10/7/22 Options Counselor TC/VOAA Program: Homemaking |Home Delivered Meals| Transportation Client: Char...	AdvantAge Health Resource Center	▾
4	☐	SCN-0000034	Client-00184102	10/6/2022	10/7/2022, 1:49 PM	Jerry is working on getting LTC Medicaid. As of now he has not been approved and would like to be considered for Region 10 services for the time being. He would like HM...	AdvantAge Health Resource Center	▾
5	☐	SCN-0000036	Client-00180888	10/9/2022	10/9/2022, 12:13 PM	Member is deceased 10/8/22	Tri-County Health Network	▾
6	☐	SCN-0000037	Client-00032285	10/9/2022	10/9/2022, 12:36 PM	Member has moved to GJ. Texted Amy Efurd on 10/9 to let her know. Emailed Region10 Senior Meals to cancel meals.	Tri-County Health Network	▾
7	☐	SCN-0000054	Client-00400300	10/4/2022	10/10/2022, 11:36 AM	Added in ADRC Note.	AdvantAge Health Resource Center	▾
8	☐	SCN-0000056	Client-00417387	10/6/2022	10/10/2022, 11:58 AM	CM provided the CG with a phone consultation. CG stated that dad has moved in with him and that dad has health issues after 2 bouts with COVID 19. CG described dad as a...	Pikes Peak Area Council of Governments	▾

📓 NOTE: Refer to our List View Guide if you need more assistance in creating your own.

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Sharing Case Notes for Teams

If you have case notes of any type that you want other members of your team to be able to view, you will need to contact the SUDS Help Desk so we can set up a **Group and Sharing Rule** for you and your team.

Example: Five Case Managers work for Community Living Case Management. The five case managers need to be able to see each other's care plan notes so anyone can help a client when needed. This will only be possible for employees within the same agency.

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Case Note Unit Conversion

Unit Conversion from Case Note

Beginning July 1, every night a batch process will run that reviews all ADRC notes, care plan notes, nutrition service notes, and provider case manager notes. Any notes created after July 1, 2024 and do not have their "Converted as a Service Unit" checkbox selected are reviewed for unit creation.

Service Case Note Provider

Teller Senior Coalition

Converted As Service Unit

Case Management Service Information

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Unit Conversion from Case Note

The note must have "Billable Time with Client" set to a non-zero amount. Provider case manager notes and care plan notes must have a "Case Management Service Type" selected. ADRC notes must have an "ADRC Service Type" selected.

Unit Conversion from Case Note

If your user account gives you access to more than one provider, and you are entering a note for a provider other than your primary provider, you must select that provider in the "Service Case Note Provider" field or the unit will be credited to your primary provider.

Unit Conversion from Case Note

Finally, the provider must have an active service authorization for the service and service subtype involved.

If no active Service and Subtype exist, the system will not convert your case note to a unit.

Unit Conversion from Case Note

Service Units will be created nightly from case notes.
The Created By will be our vendor but the Provider and Provider Location will be created from the user entering the case note.

The Service Case Note Record will be referenced on the new unit.
All units from Case Notes are 1:1.

Case Note Reports

Case Note Reports

There are several options for creating reports of case notes. Examples include:
- Case Notes by Month
- Case Notes by Record Type (e.g., ADRC, Care Plan Notes, Nutrition Notes)
- Case Notes with certain Keywords (e.g., deceased)
- Case Notes tied to a particular service (e.g., application assistance, Caregiver services, etc.)

Reports may also be used for tracking Case Note Unit Conversion. These reports will be added to the All User Report Templates by July 1, 2024.

Please contact Adrienne Jones via the SUDS Help Desk email (cdhs_sudshelpdesk@state.co.us) for any reporting needs.

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You Have Help

SUDS Website

What You'll Find Here:

- SUDS Training Schedule

- Instructional videos for the **Multi-Factor Authentication** Process and use of **YubiKeys**

- **Videos of SUDS Enhancements** and any associated materials

- **Videos of SUDS Training Events** and any associated materials

- Any other handouts that have been sent re: SUDS

- Information on the SUA Data Systems, security access, and help desk requests

NOTE: The Website is growing with SUDS. Materials will be added as soon as they are available. This website will be your best source for any updates

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SUDS Help Desk

All SUDS technical support requests should be sent to:

cdhs_sudshelpdesk@state.co.us

If you feel you have come across a bug in SUDS, please send as much detail as possible in your email including:

✔ Date and Time

✔ Record number, if applicable

✔ Detailed information about the error, including the screen or task you were performing

> I just finished creating Client-012346 and when I clicked Save I got this error: We hit a snag. Review the following fields Last Name

✔ If possible, include a screenshot of the error you are experiencing

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