How to Analyse Care Notes and Generate Reports

Care Planning · https://cclearninghub.co.uk/docs/how-to-analyse-care-notes-and-generate-reports/

How to Analyse Care Notes and Generate Reports



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This guide explains how to use the Care Note Analysis feature to review, filter, and generate insights from care documentation within the system.

Analysing care notes helps improve oversight, identify trends, and support better decision-making. By using filters and reporting tools effectively, you can reduce time spent searching for information, improve accuracy in reporting, and ensure important patterns or concerns are not missed.

By following this guide, you will learn how to:

- Access the Care Note Analysis feature
- Search and filter care notes by resident, staff, and date range
- Refine results using media and content filters
- Review individual care notes in detail
- Use summary views to identify trends and patterns
- Export data for reporting and compliance

- Generate AI-powered analysis reports using MargoAI

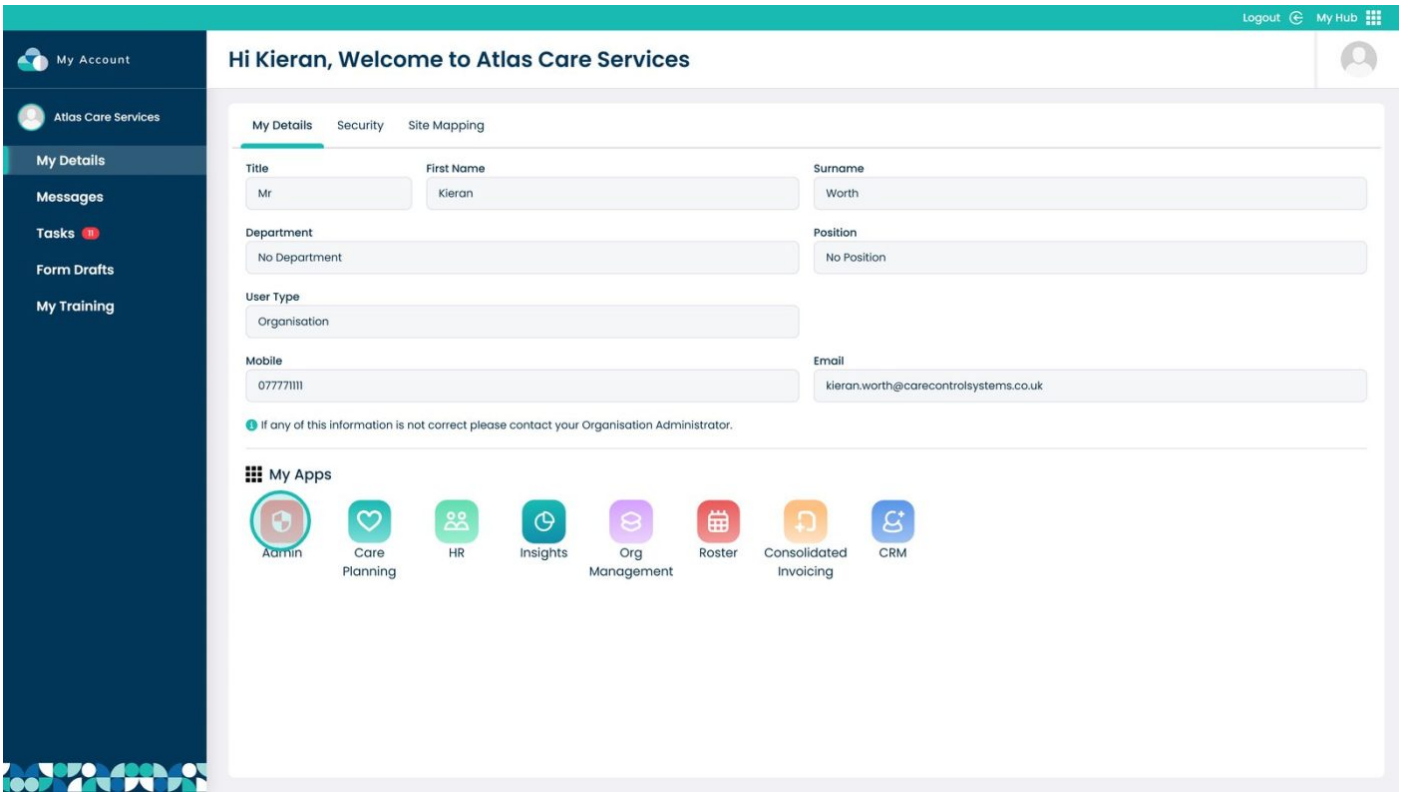
This ensures you can quickly access meaningful insights, improve care quality, and maintain clear, data-driven oversight across your organisation.

Interactive Guide

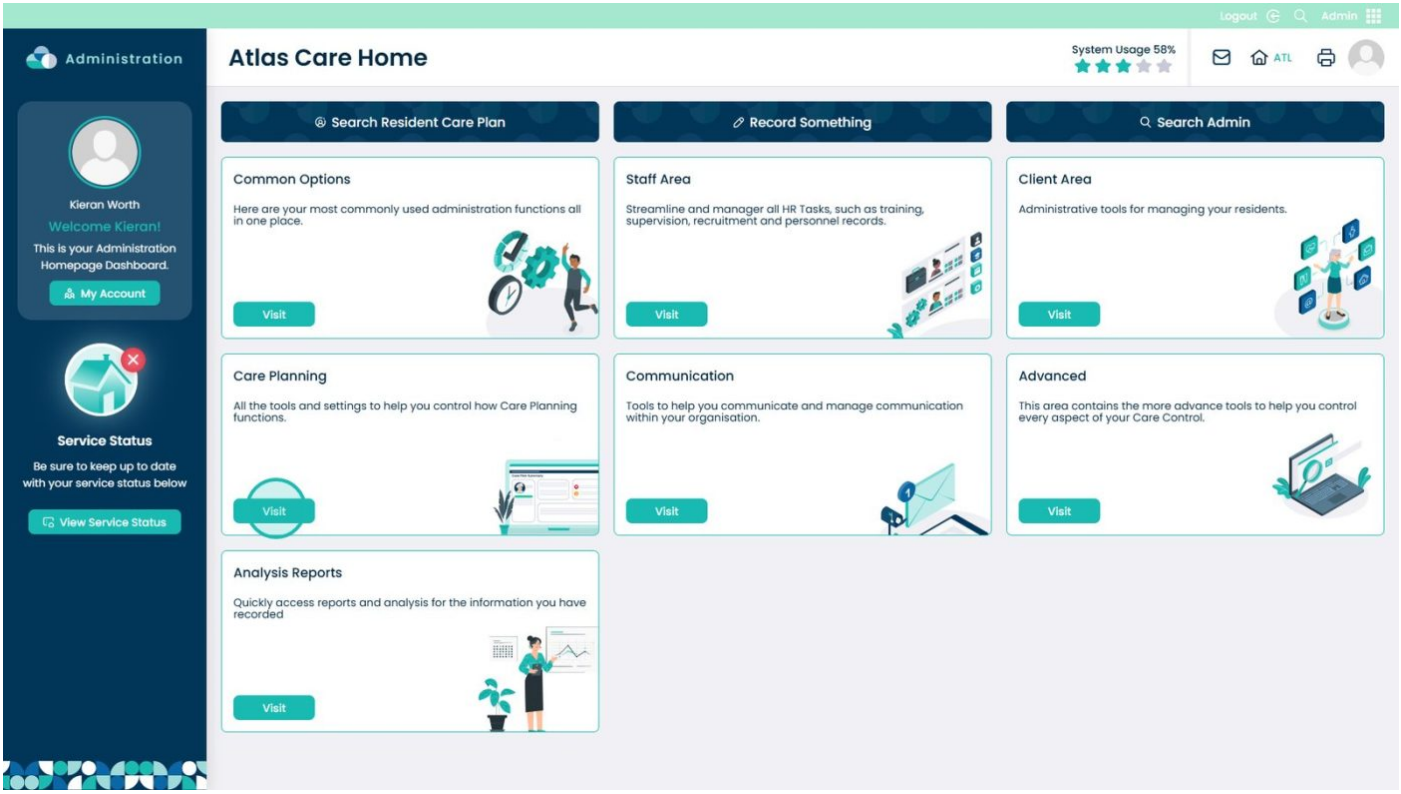
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Text based guide

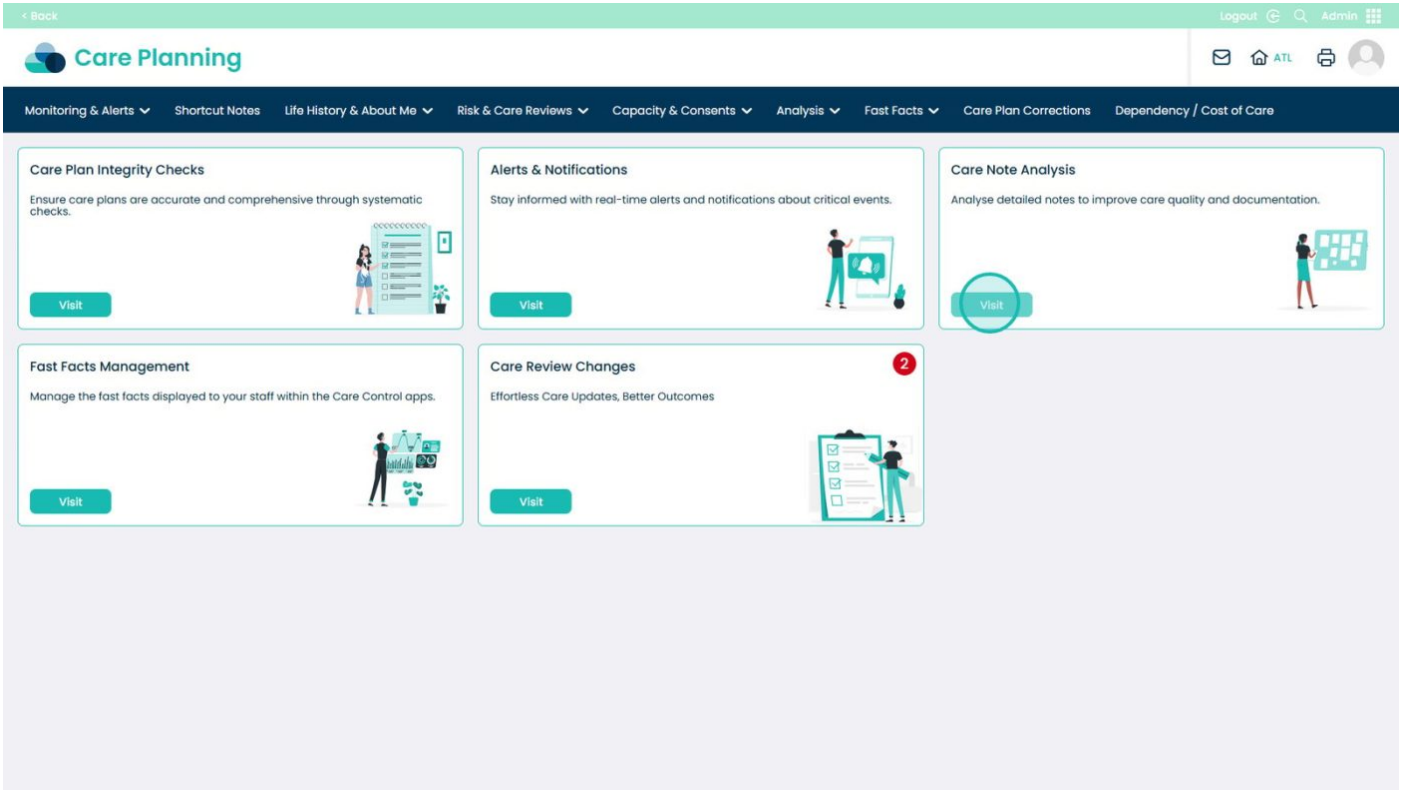
Launch the Admin app to access care planning and reporting features.



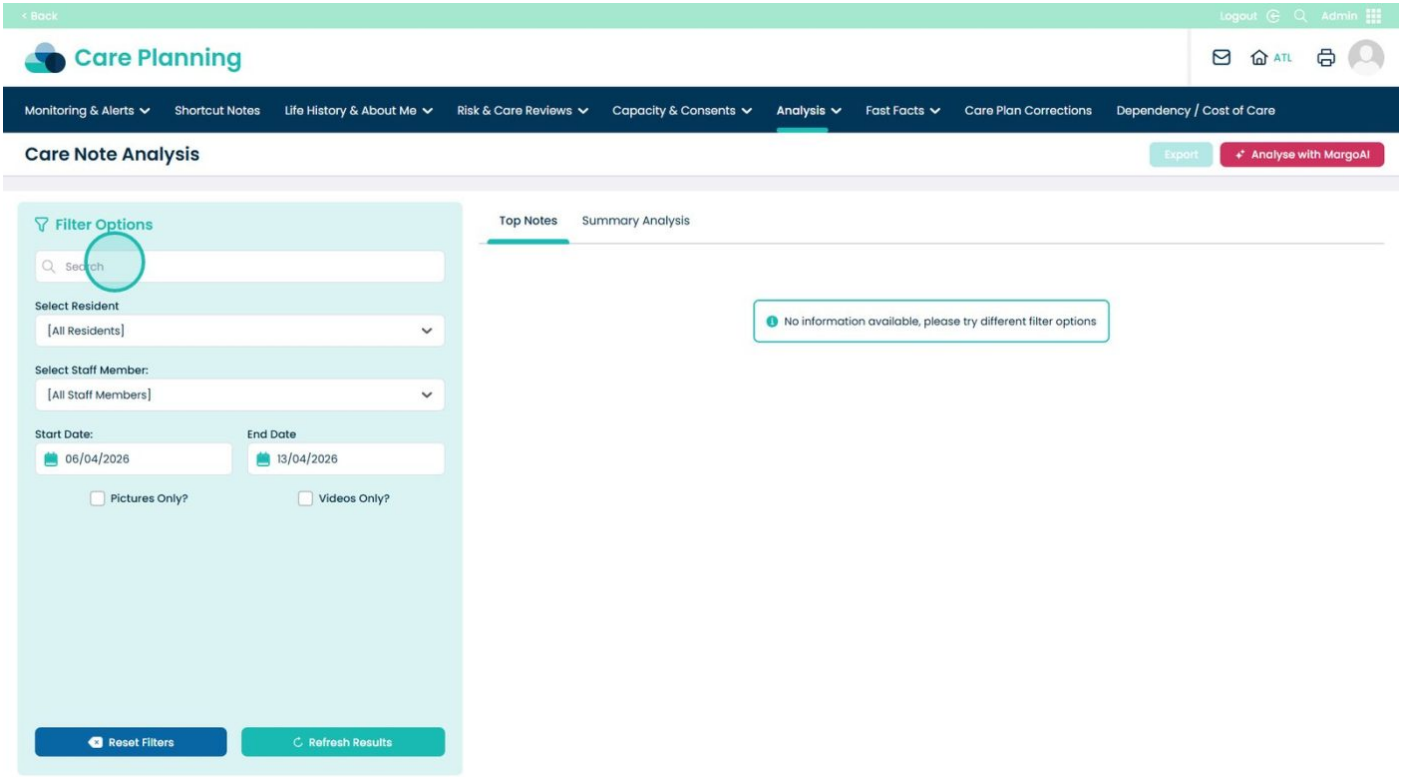
Navigate to the Care Planning section.



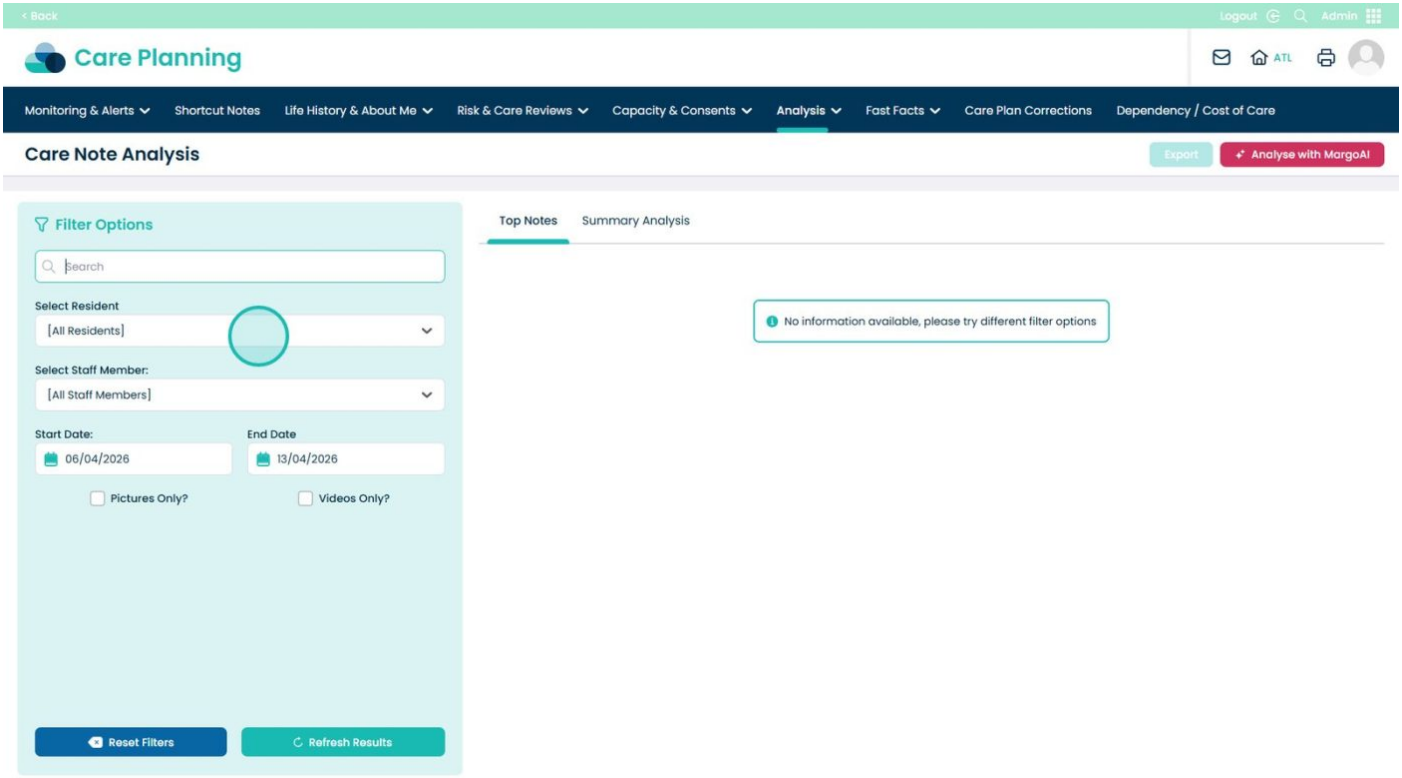
Open Care Note Analysis to view insights from care documentation.



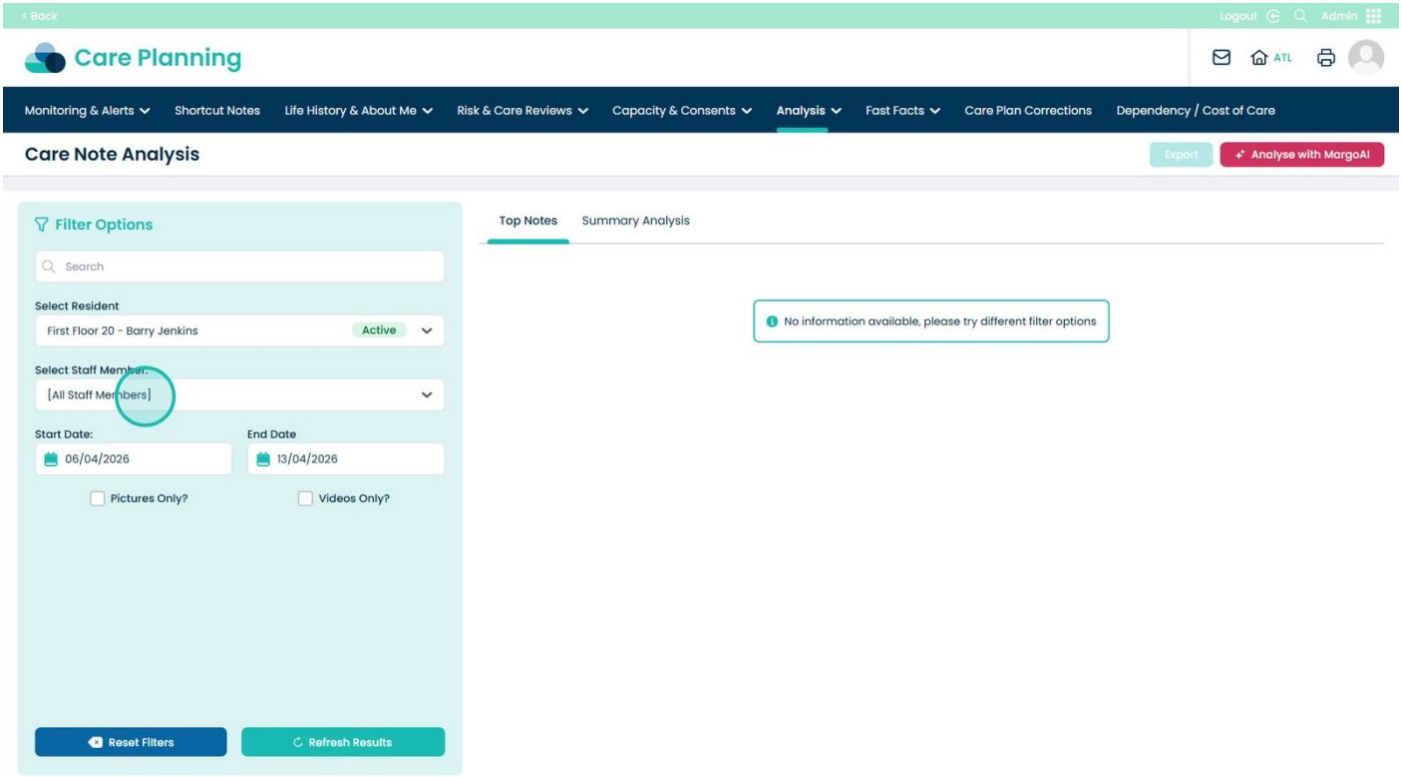
Use the search bar to find specific residents, staff, or keywords.



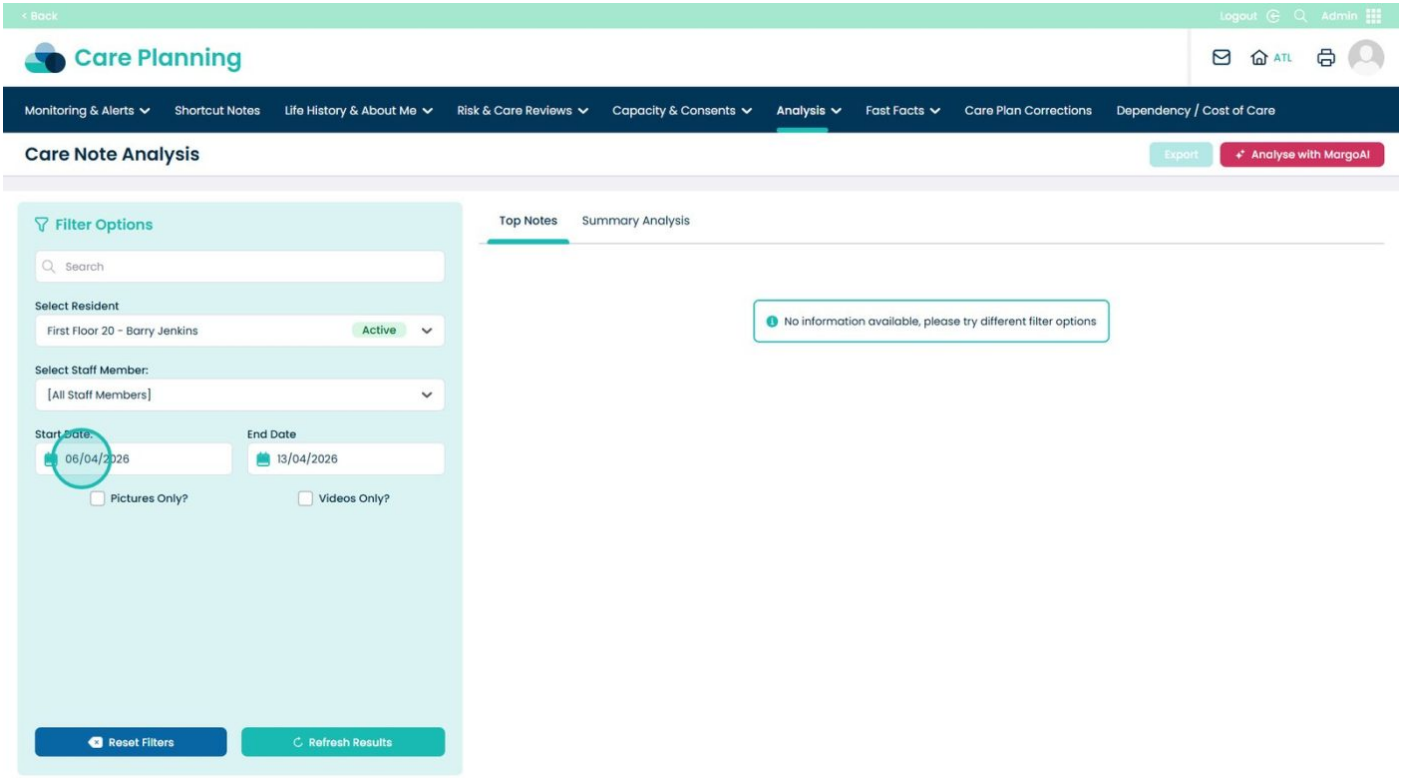
Filter by resident to analyse notes for a specific individual.



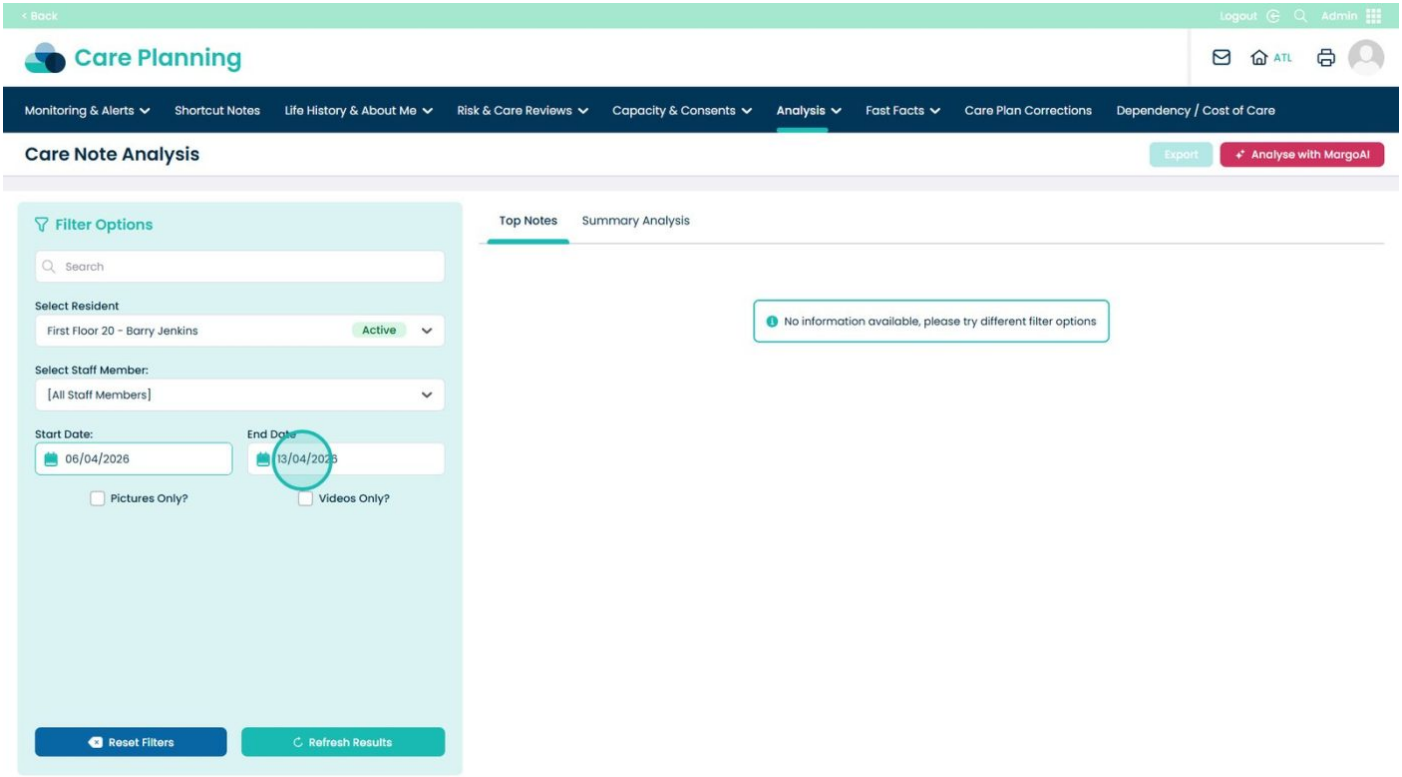
Filter by staff member to review team contributions.



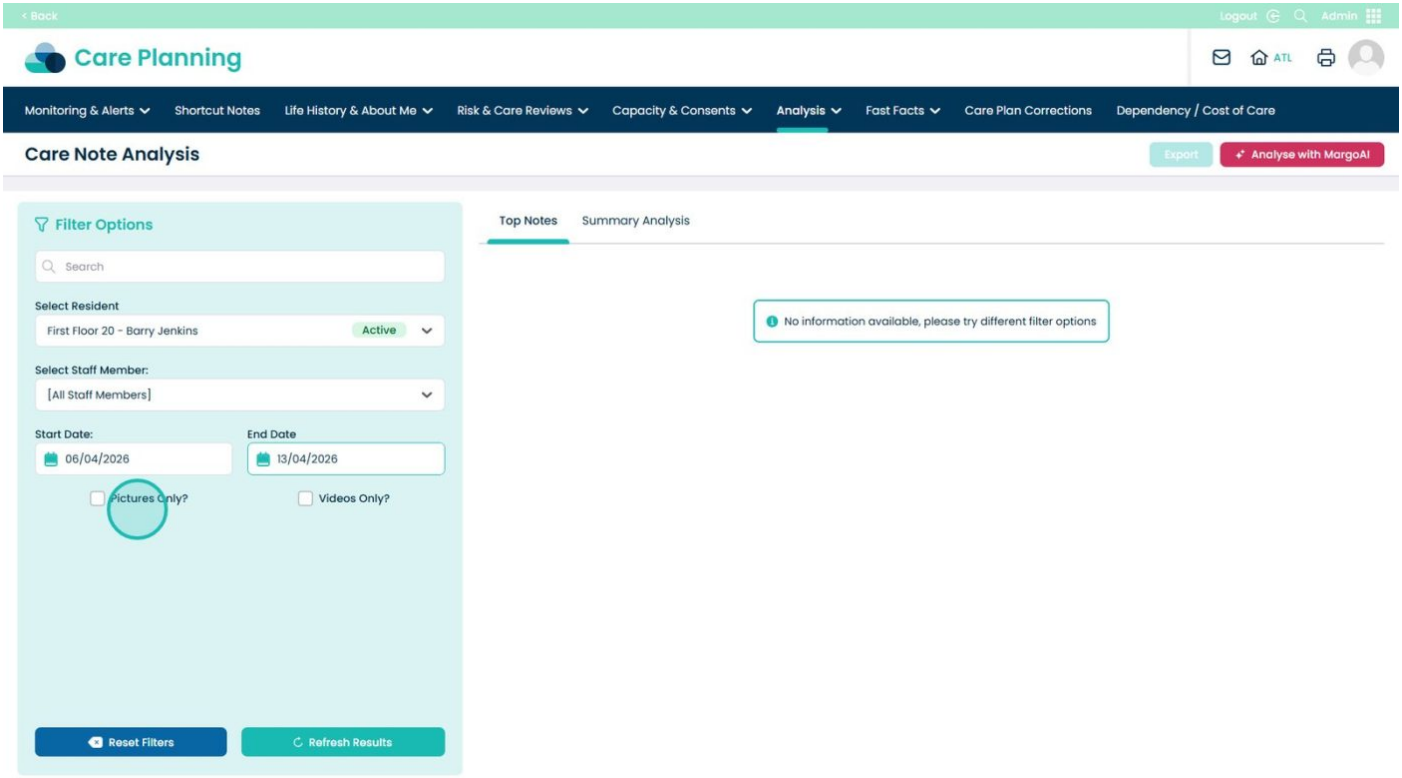
Set the start date for your reporting period.



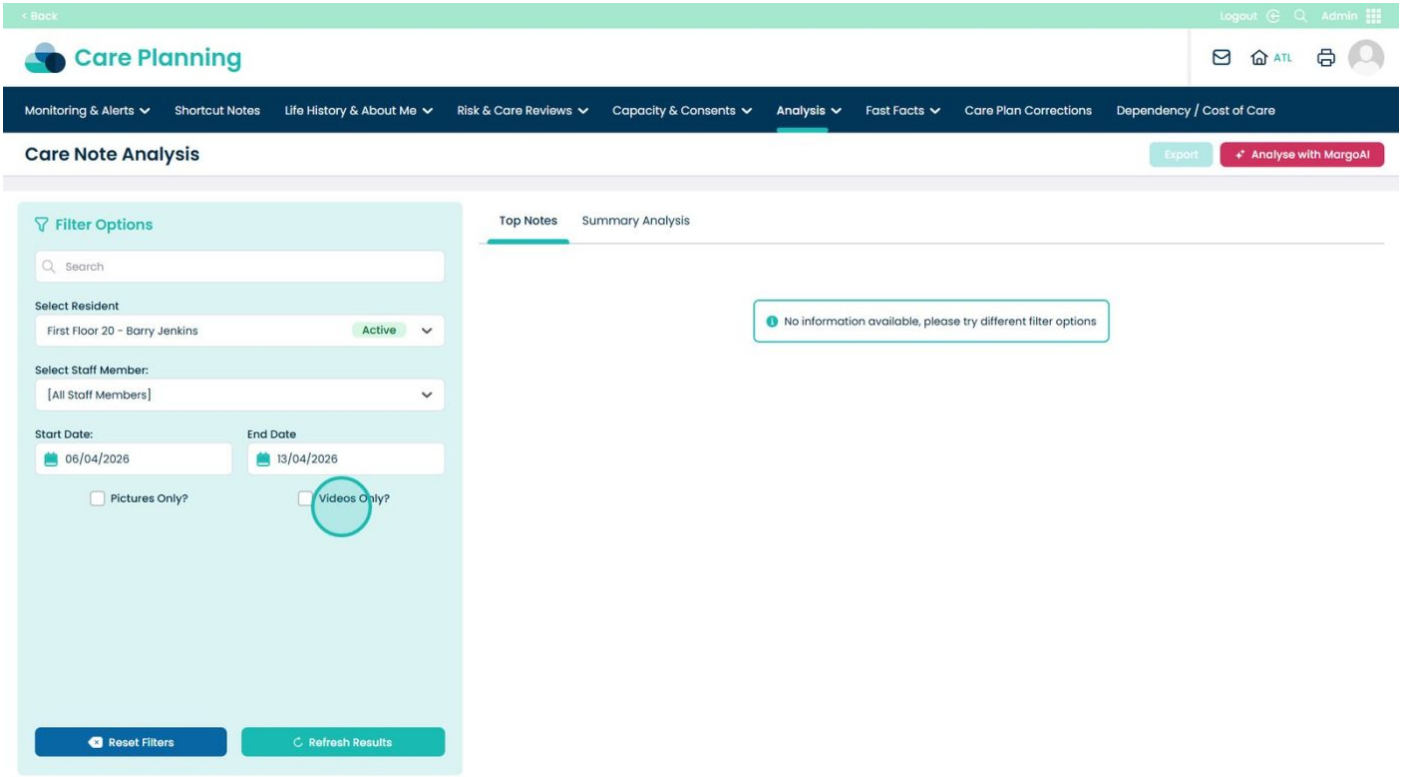
Select an end date to complete your analysis range.



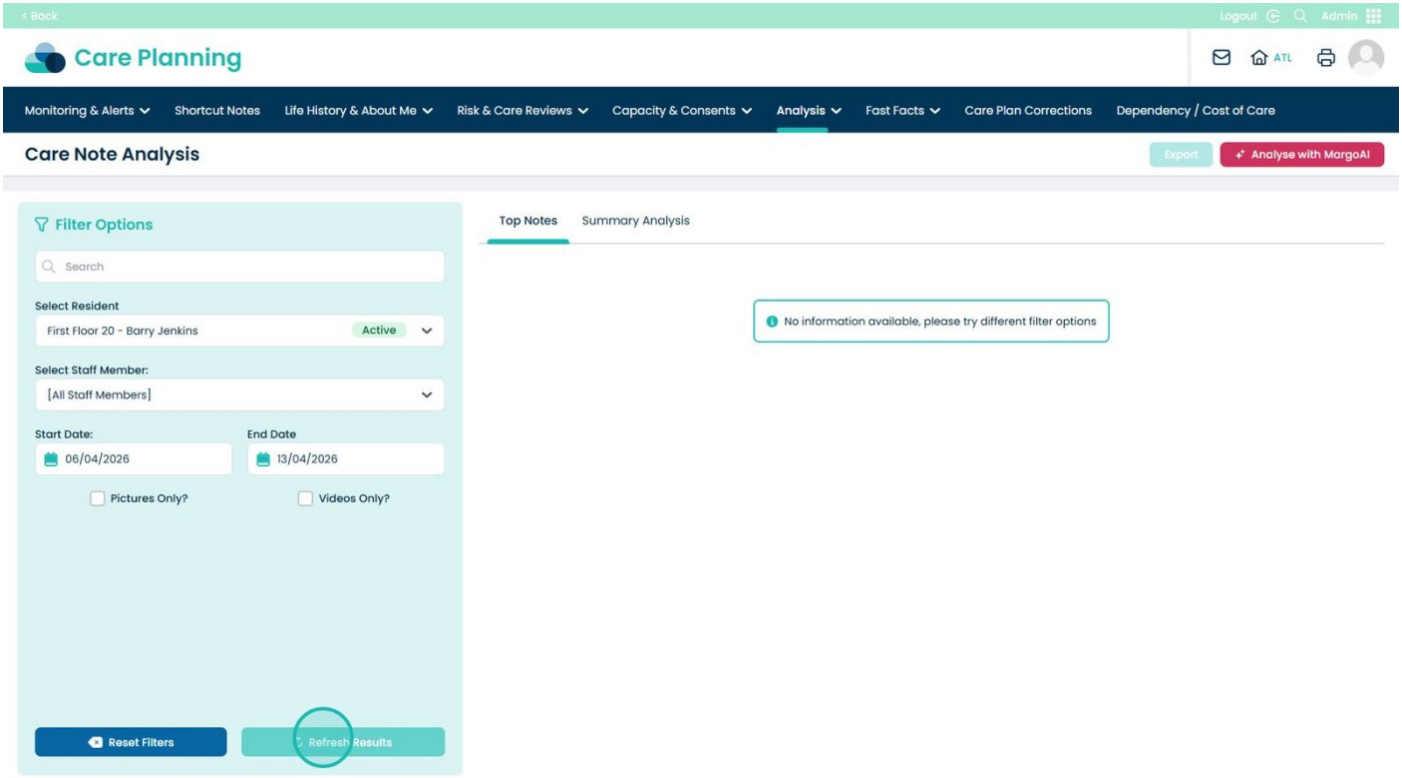
Filter results to include only care notes with images.



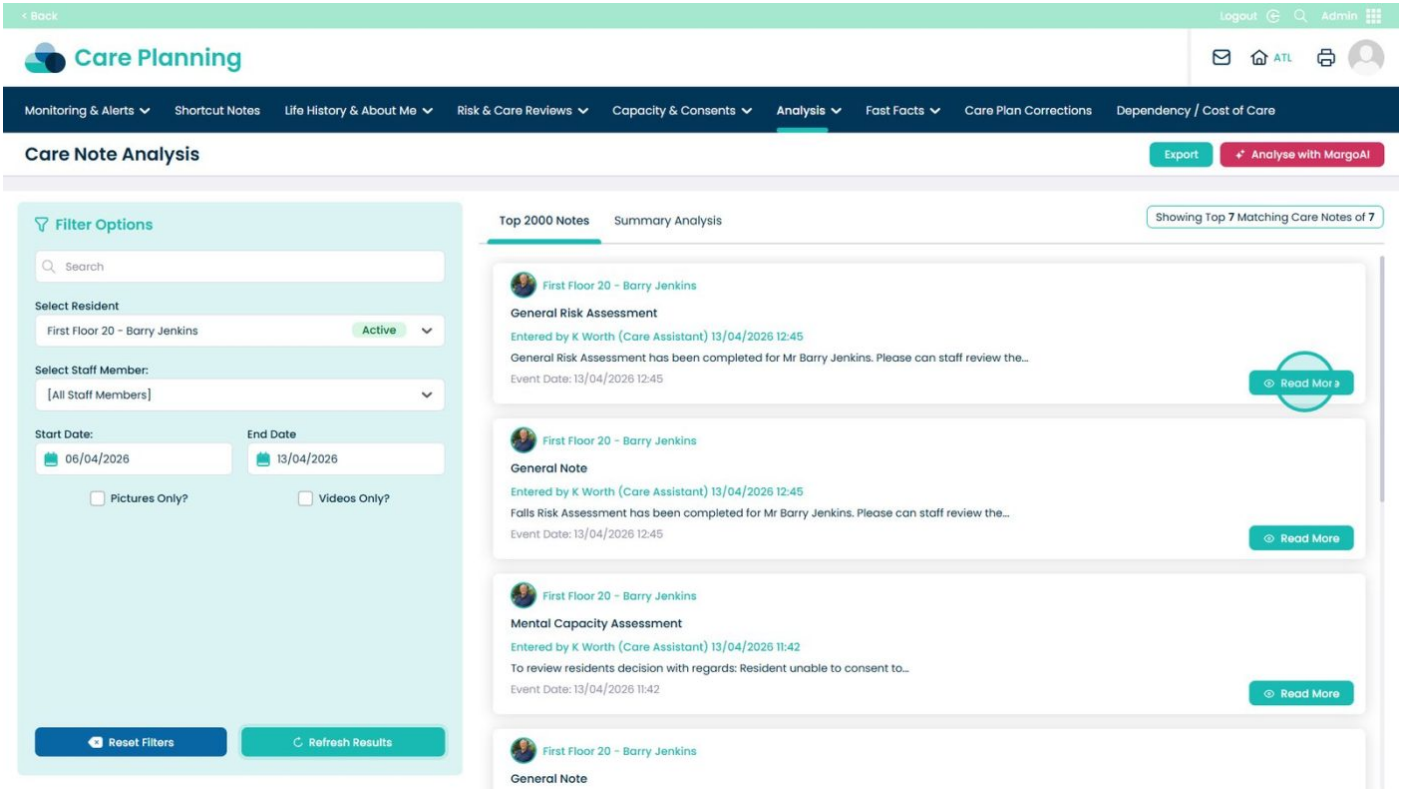
Enable video filtering to focus on notes with recorded media.



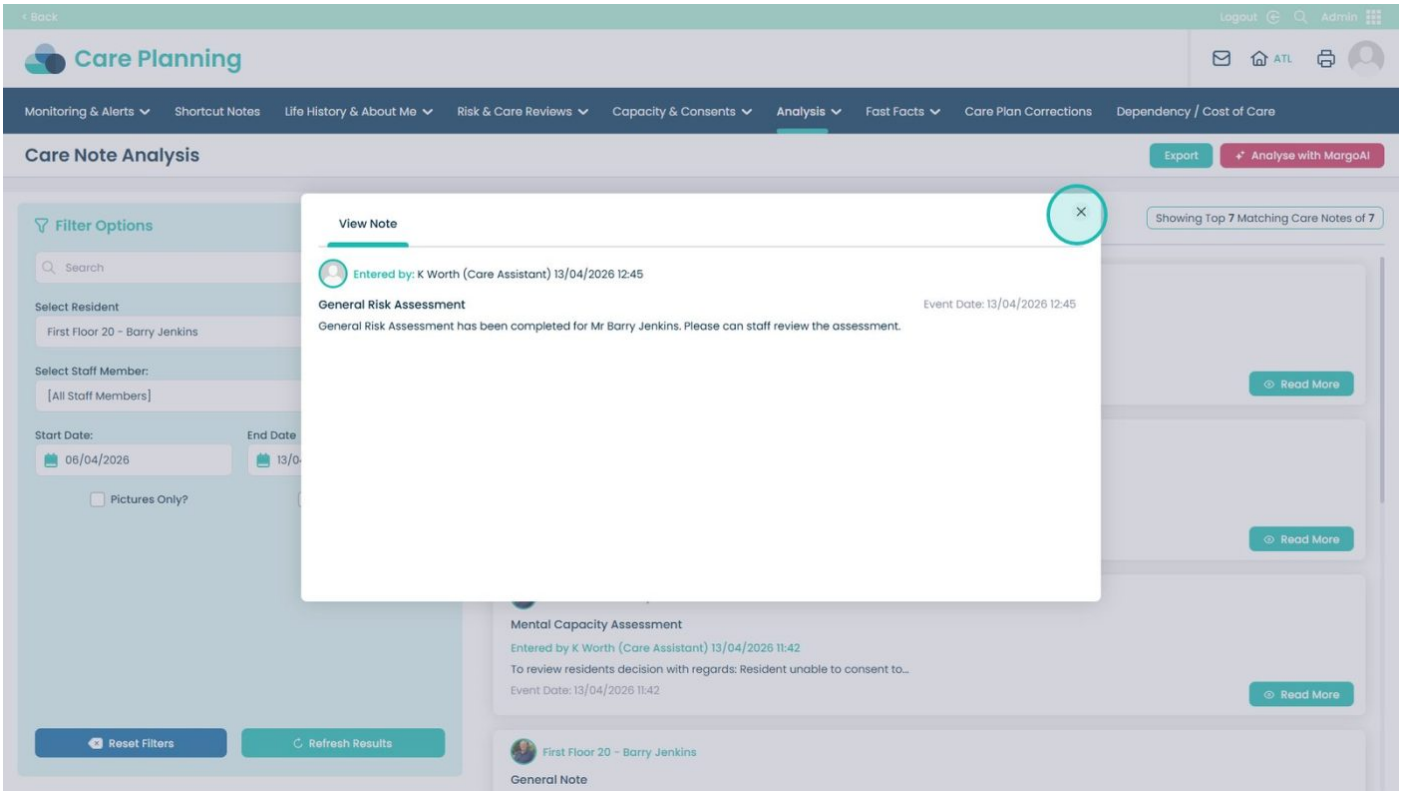
Refresh results to apply your selected filters.



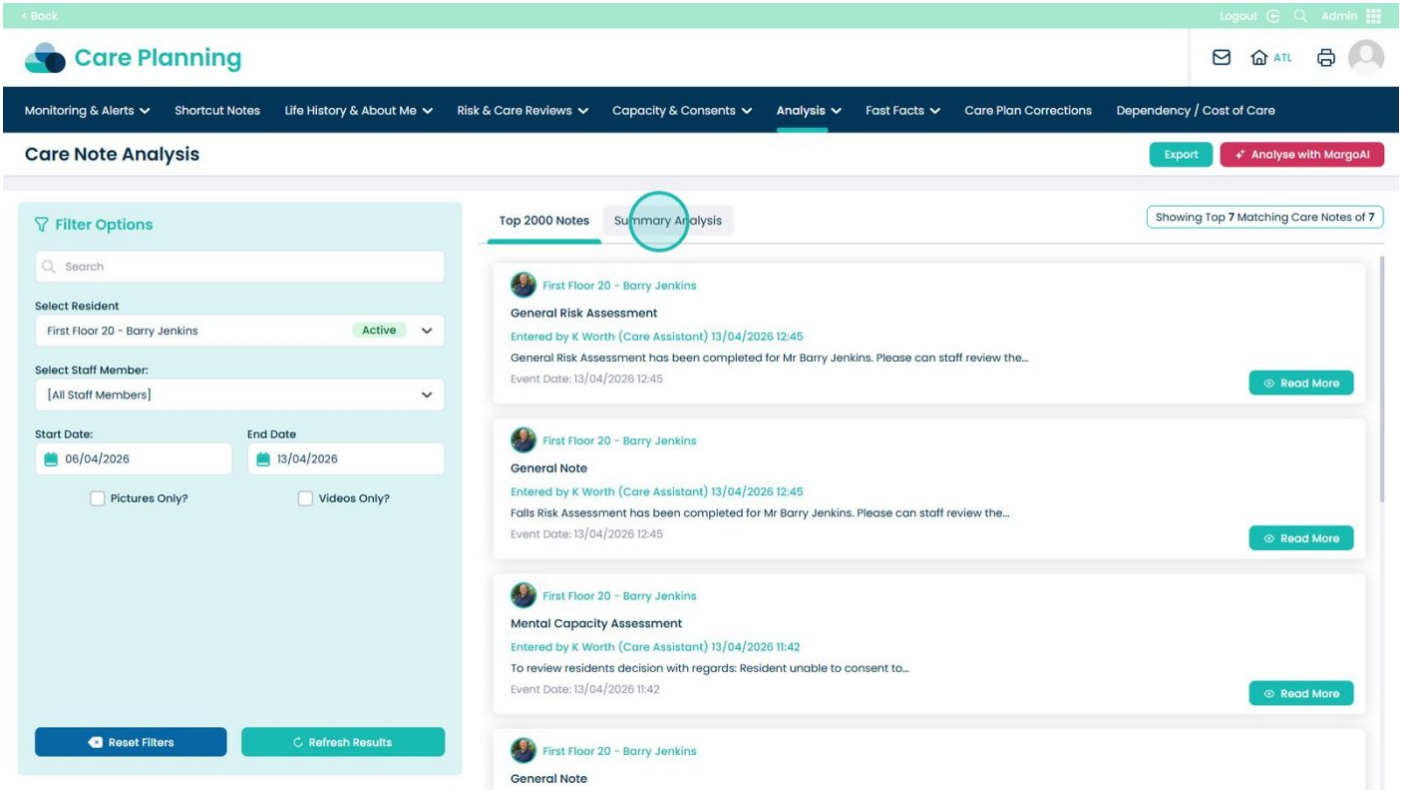
Open a care note to view full details.



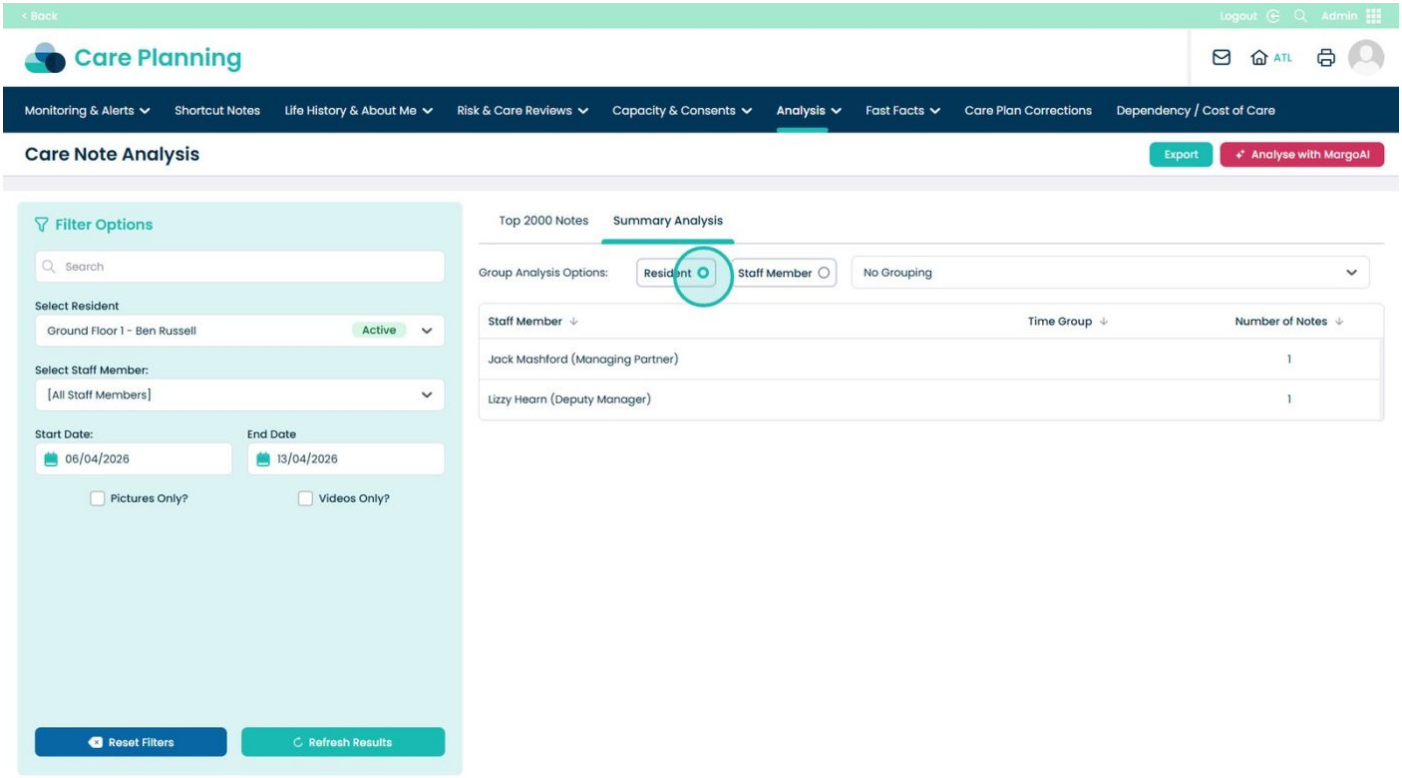
Close the note to return to the analysis dashboard.



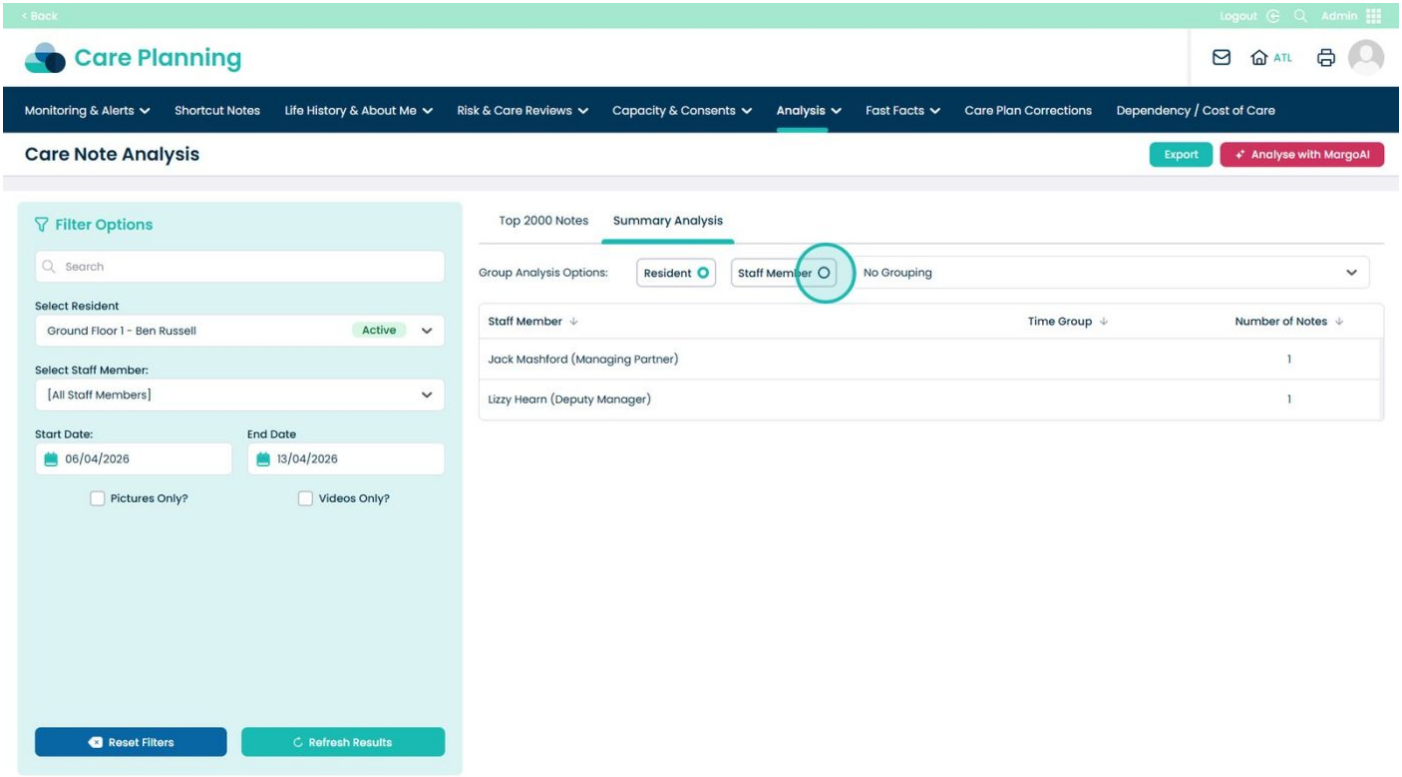
Switch to Summary Analysis for an overview of trends.



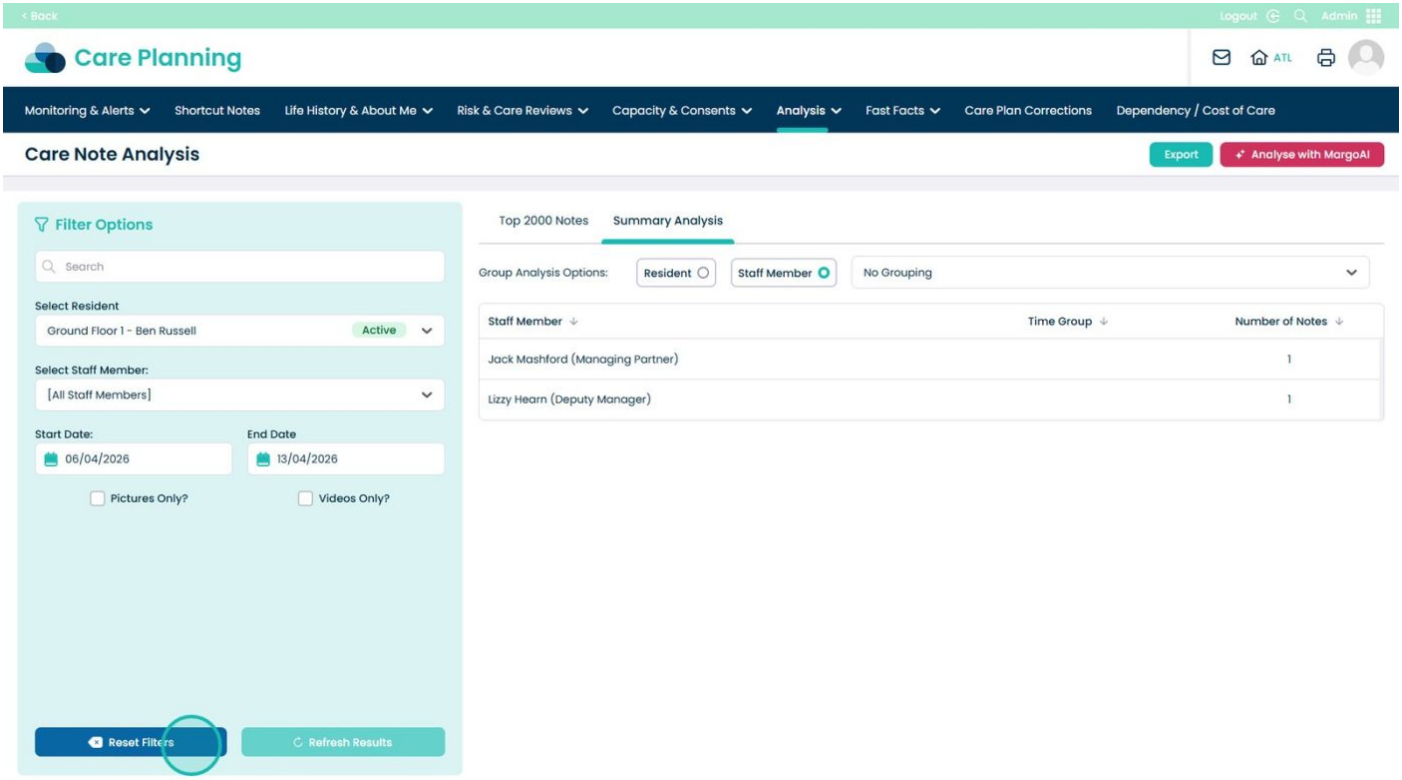
Group results by resident to analyse individual patterns.



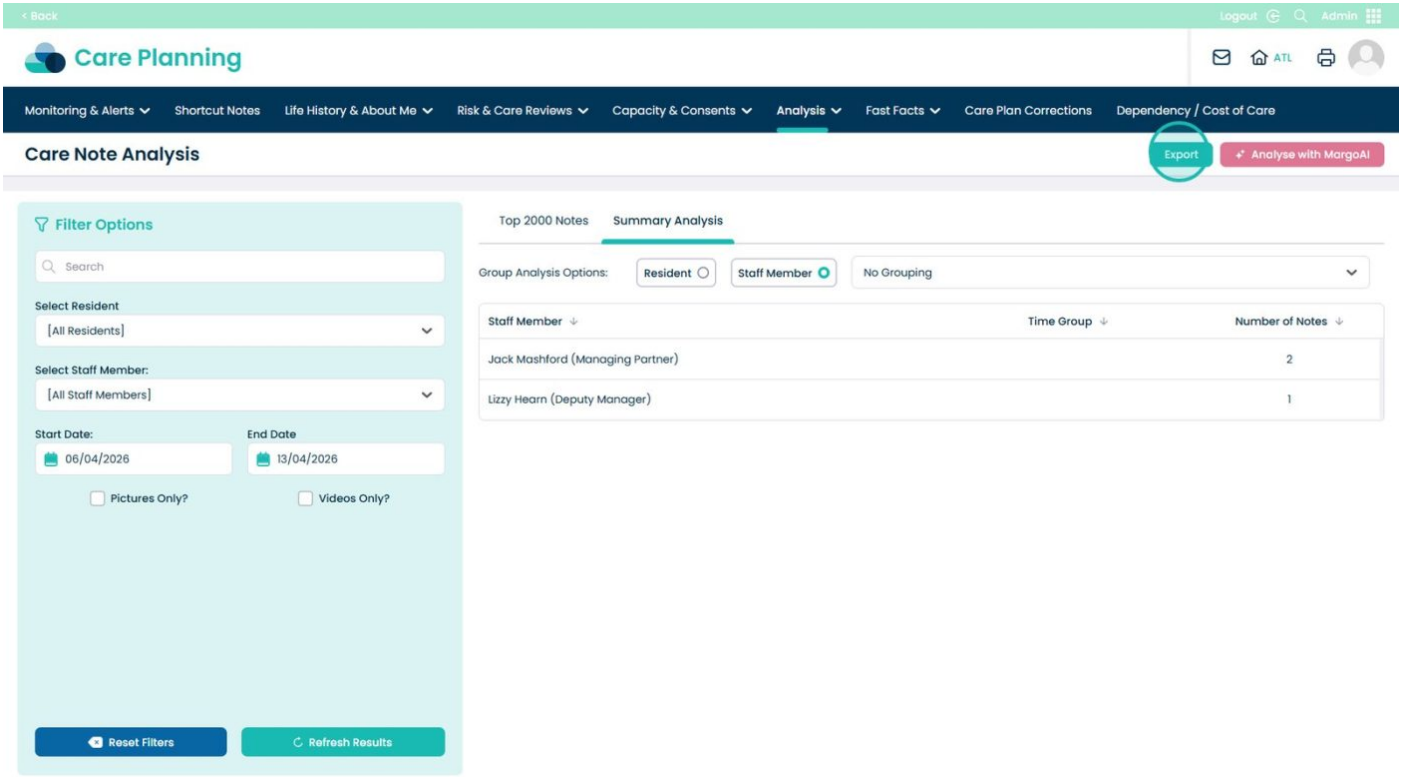
Group by staff to evaluate contributions.



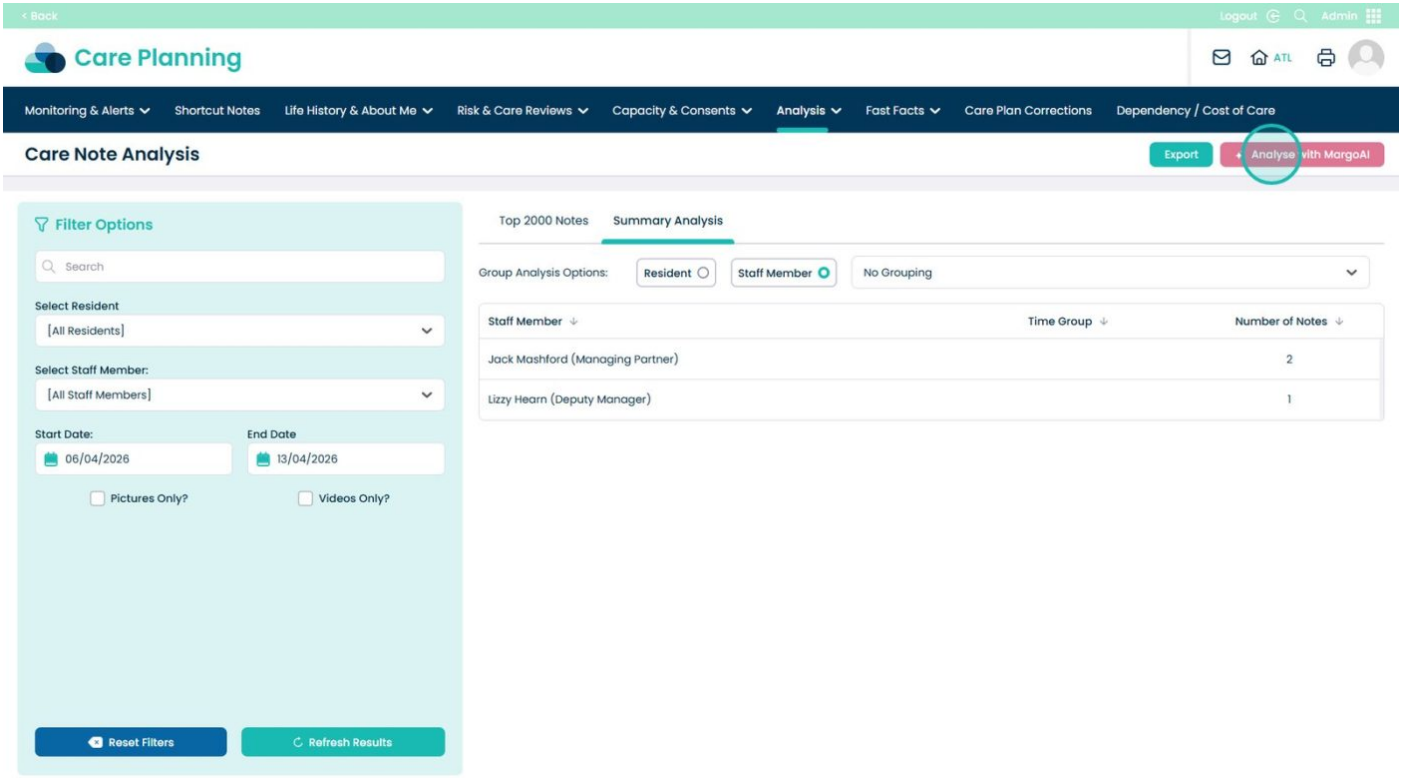
Reset filters to start a new analysis.



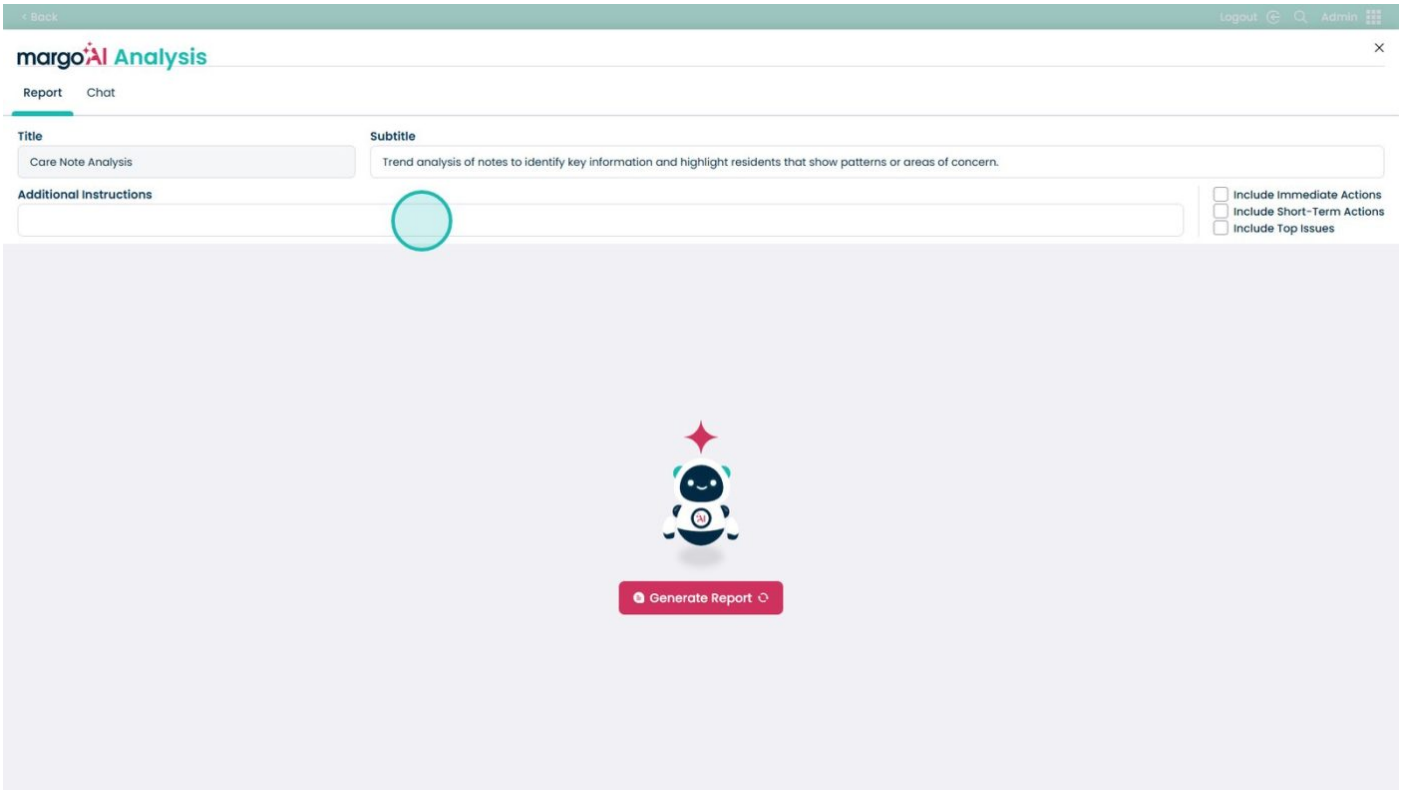
Export your data as a CSV file.



Use MargoAI to generate advanced insights.



Add instructions to customise your analysis report.



Select which elements to include in the report.

Generate the Care Note Analysis report.

Export the report as a PDF.

Close the report view to return to the dashboard.

Was it helpful ?

- Happy
- Normal
- Sad

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