How to Create a Shortcut Note on Cloud

Care Planning · https://cclearninghub.co.uk/docs/how-to-create-a-shortcut-note-on-cloud/

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Shortcut Notes make recording care quicker and more consistent by letting you pre-fill information that you use often — such as a service user’s title or other details — with just one click. This guide walks you through the simple process of creating a new shortcut note, adding the information you want included, and testing it to make sure it works as expected.

By following these steps, you can save valuable time, reduce typing errors, and make sure all staff are recording information in a consistent way. Whether you are training new team members or refreshing your own knowledge, this guide will help you set up notes that improve efficiency and support accurate, high-quality care records.

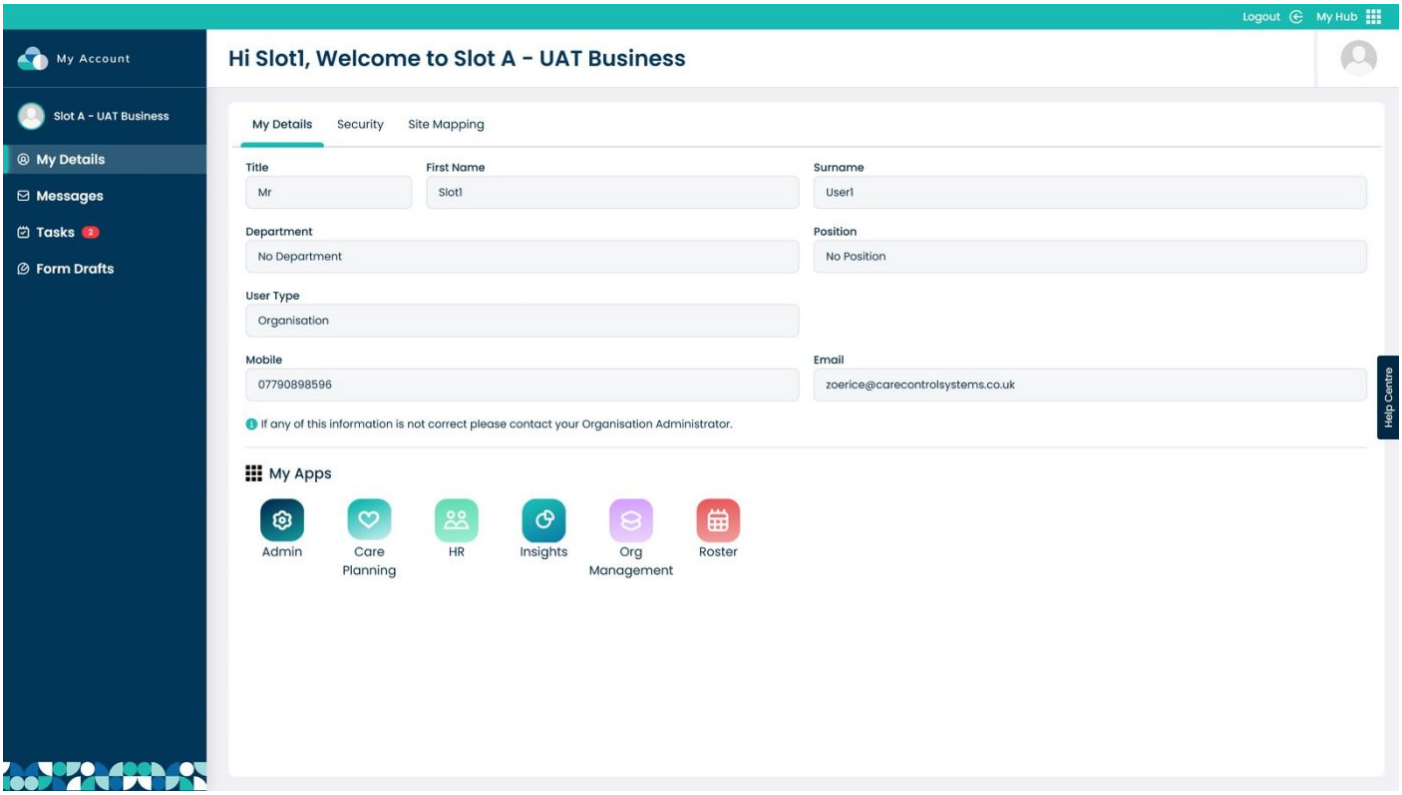
Interactive Guide

Embedded media:

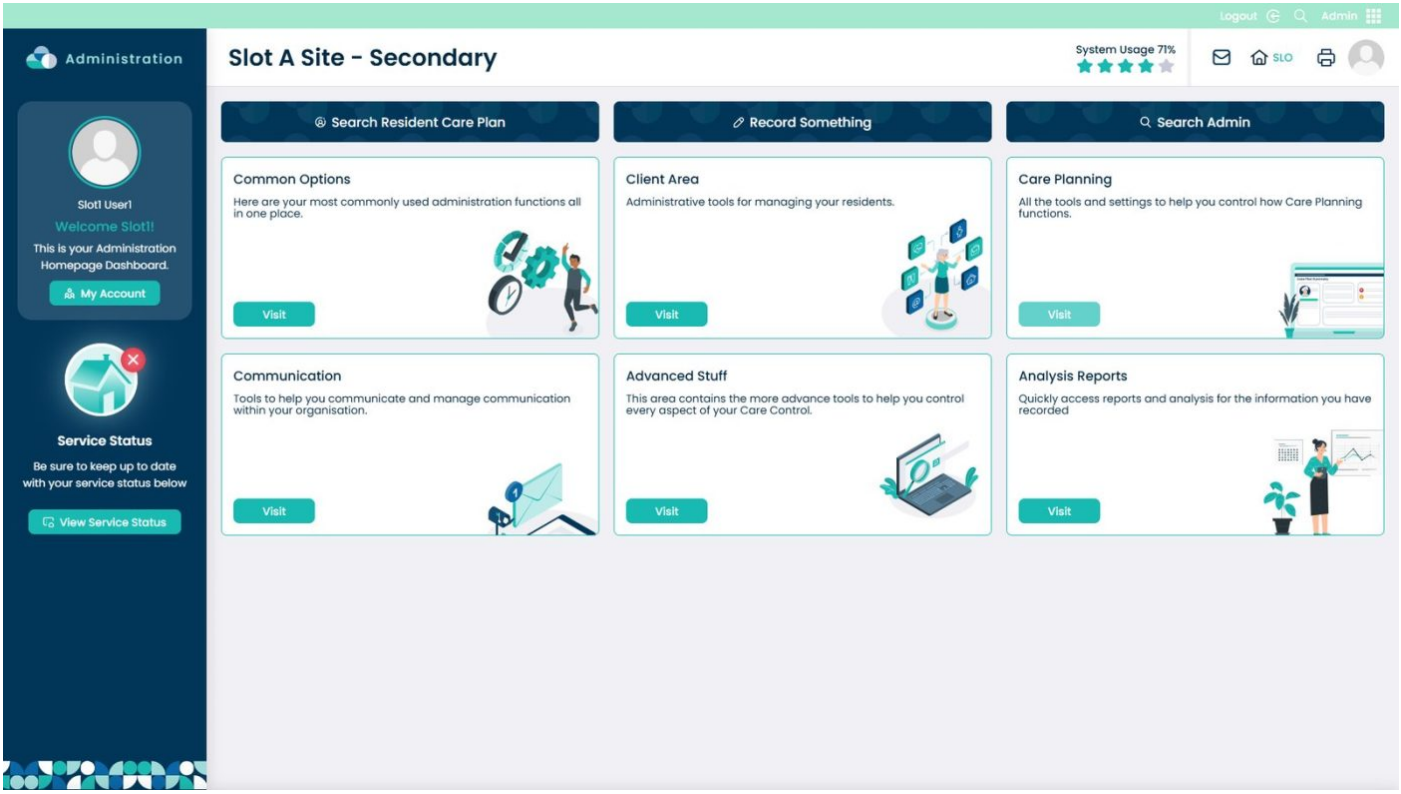
https://demo.arcade.software/t88SagcKbk0NzPyoXDsX?embed&embed_mobile=tab&embed_desktop=inline&show_copy_lir

Text based guide

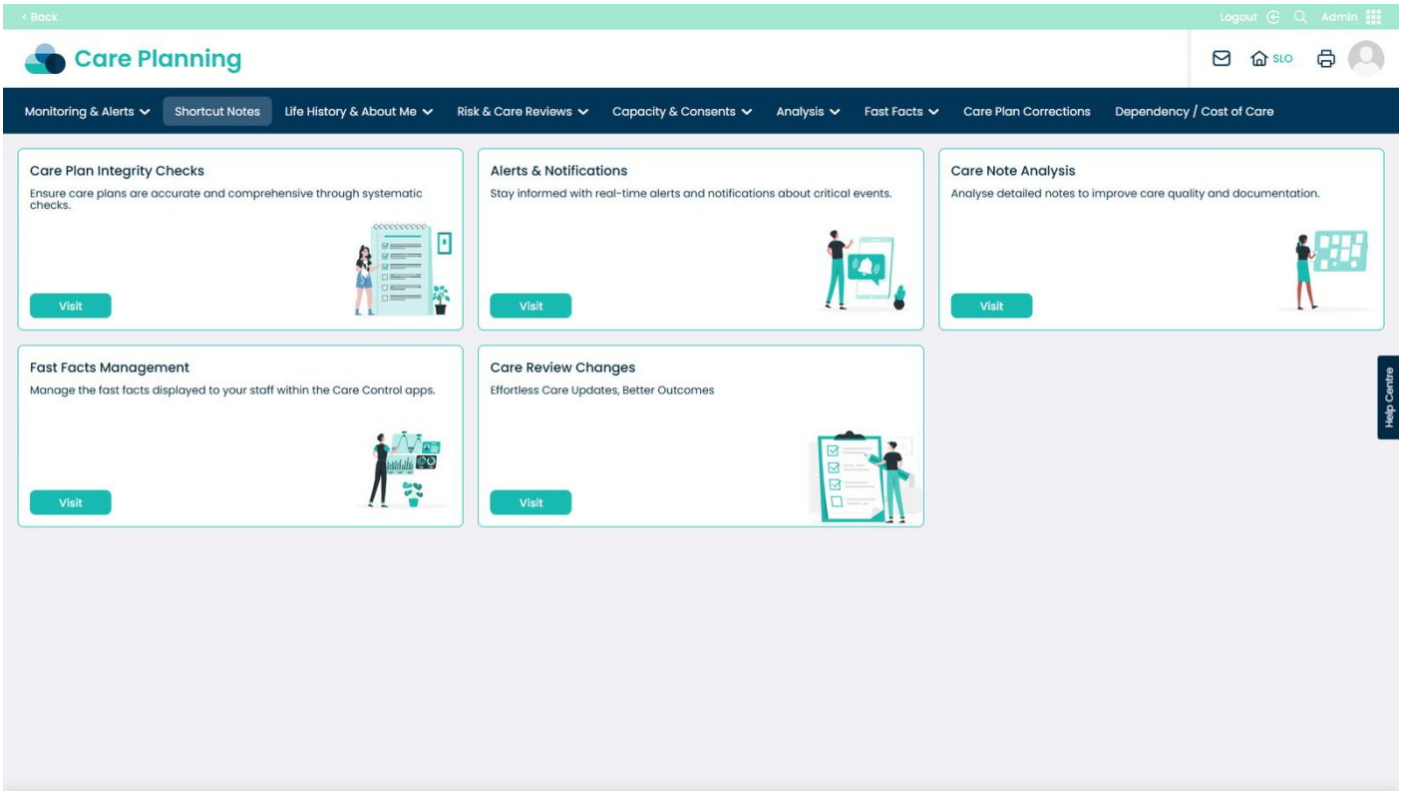
Enter the Admin App



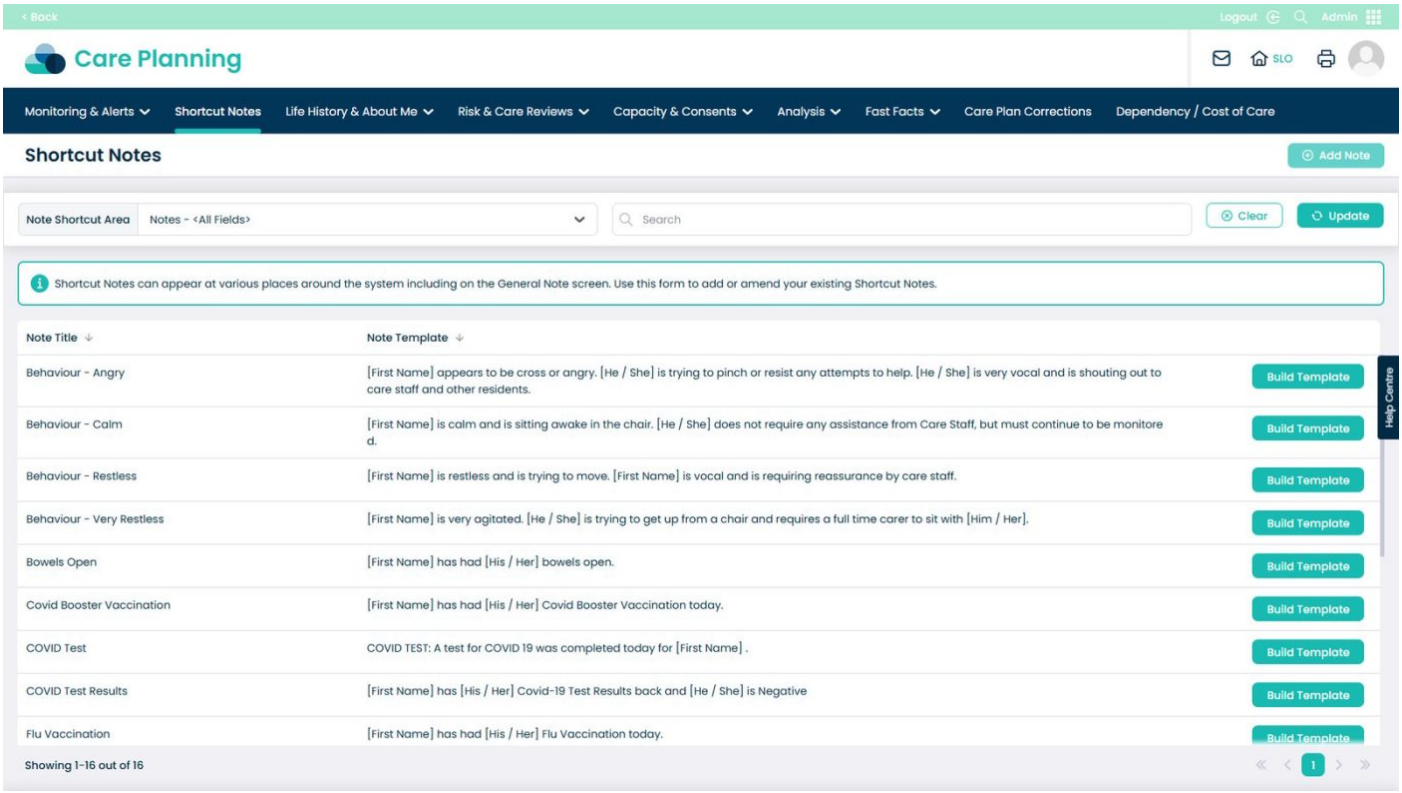
Click Visit on the Care Planning area



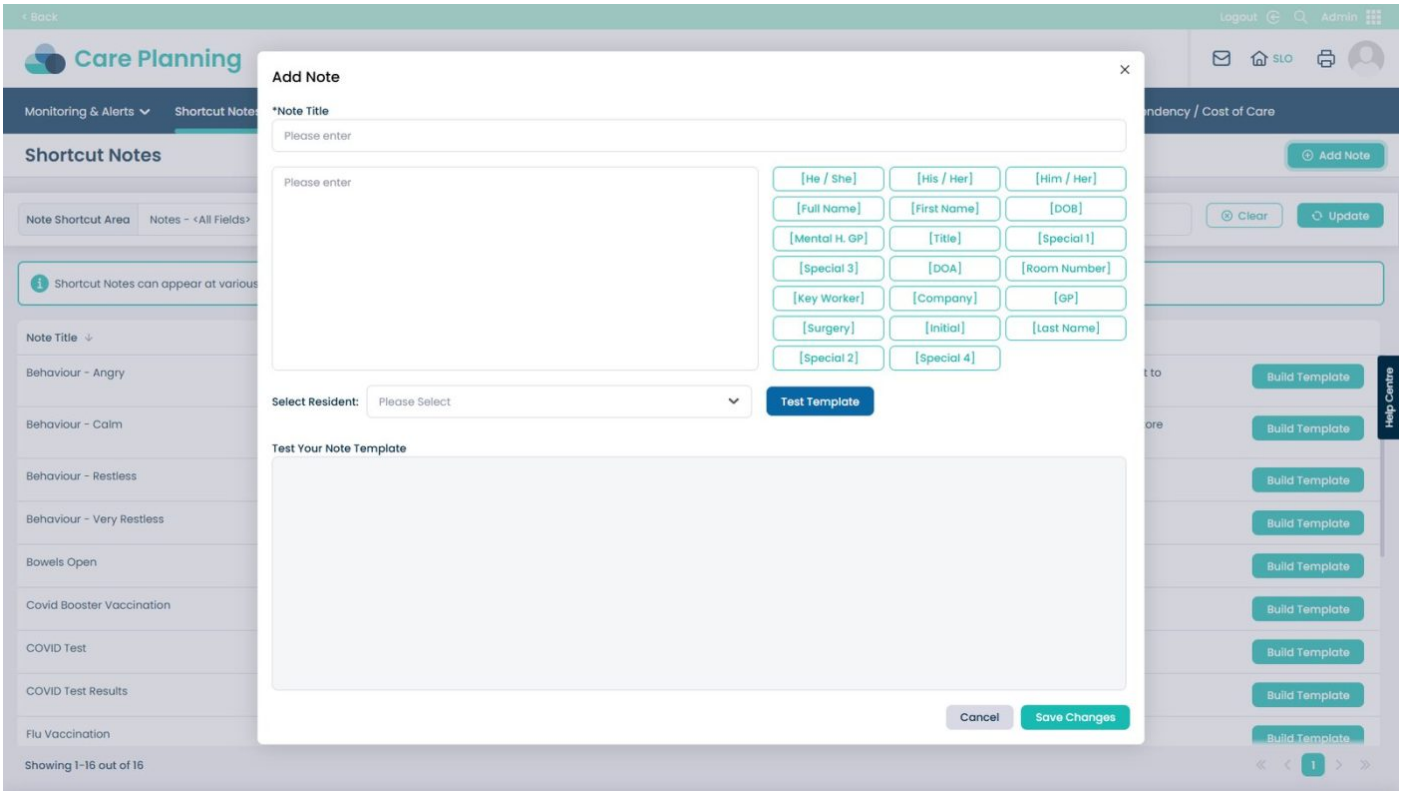
Select Shortcut Notes from the menu bar



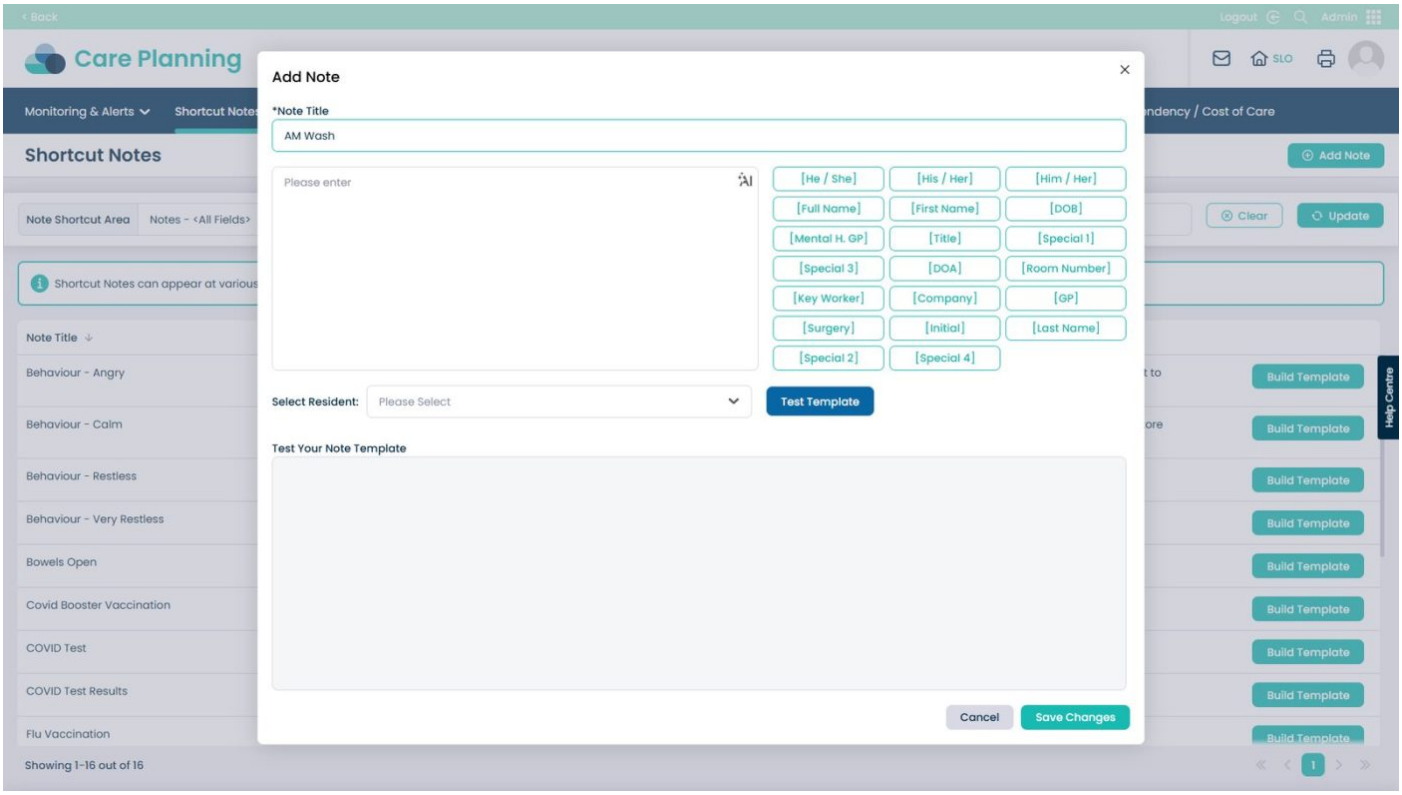
Click Add Note



Enter the title of the shortcut note

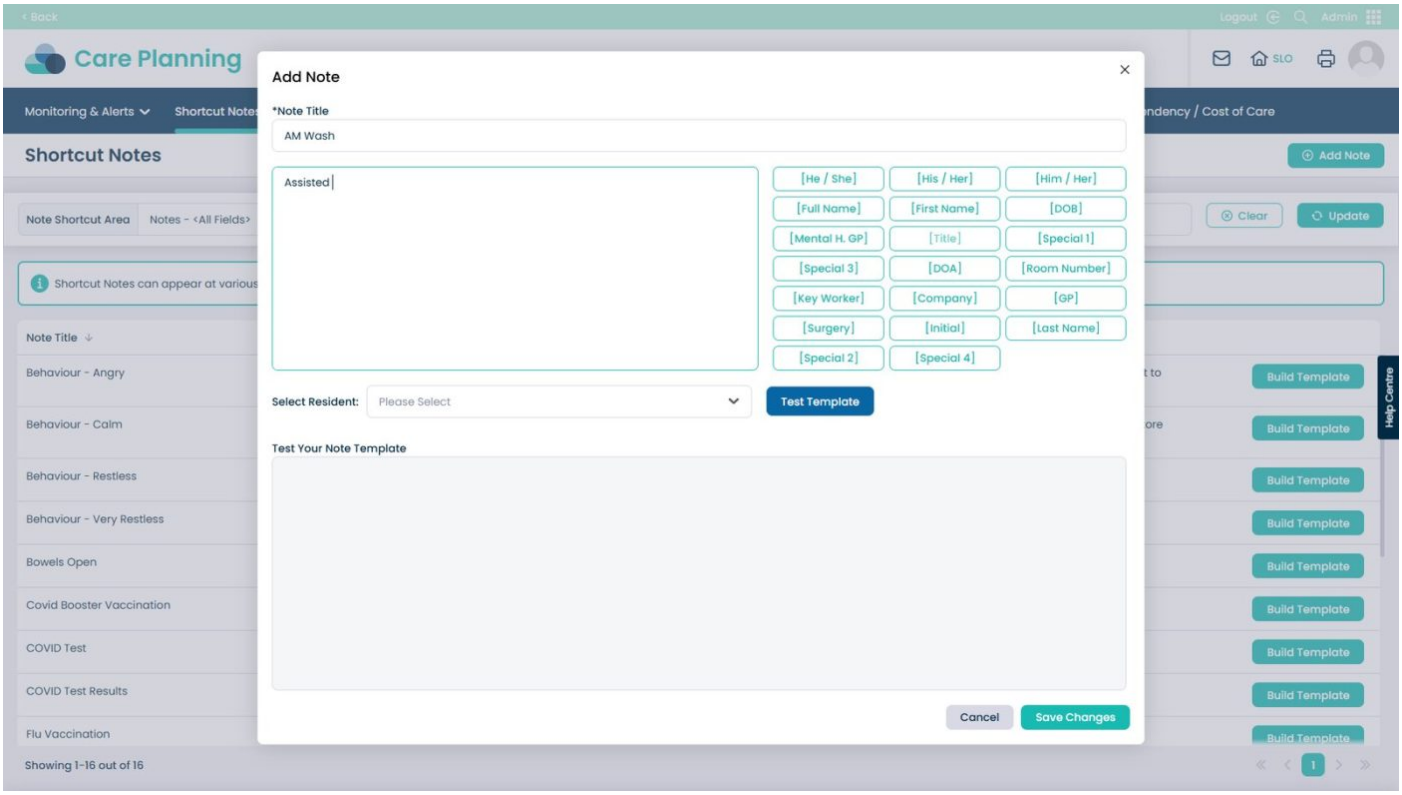


Now fill in the details of the note

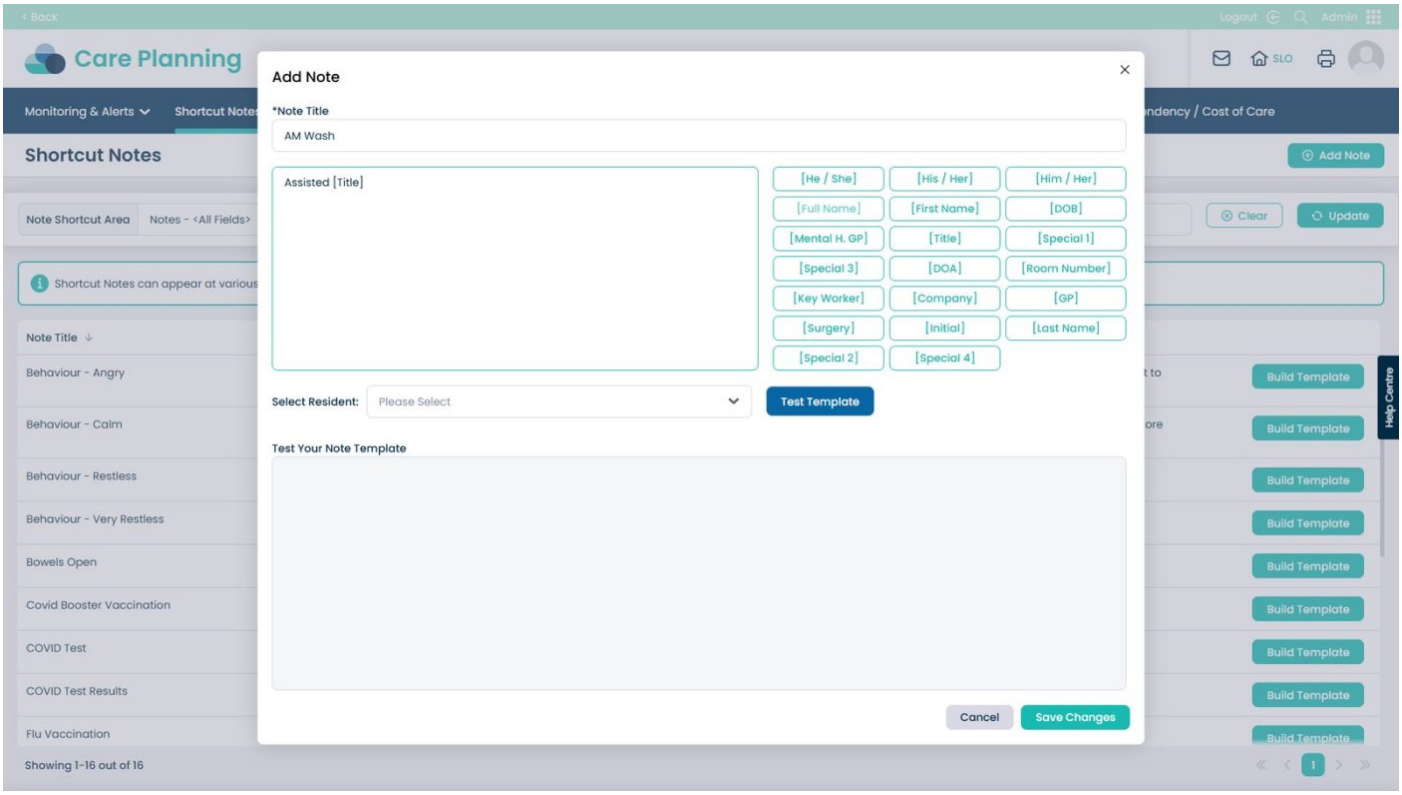


By clicking items on this menu, they will be pre-filled when the note is created. For example, with the Title option, the service user's title will be added into the

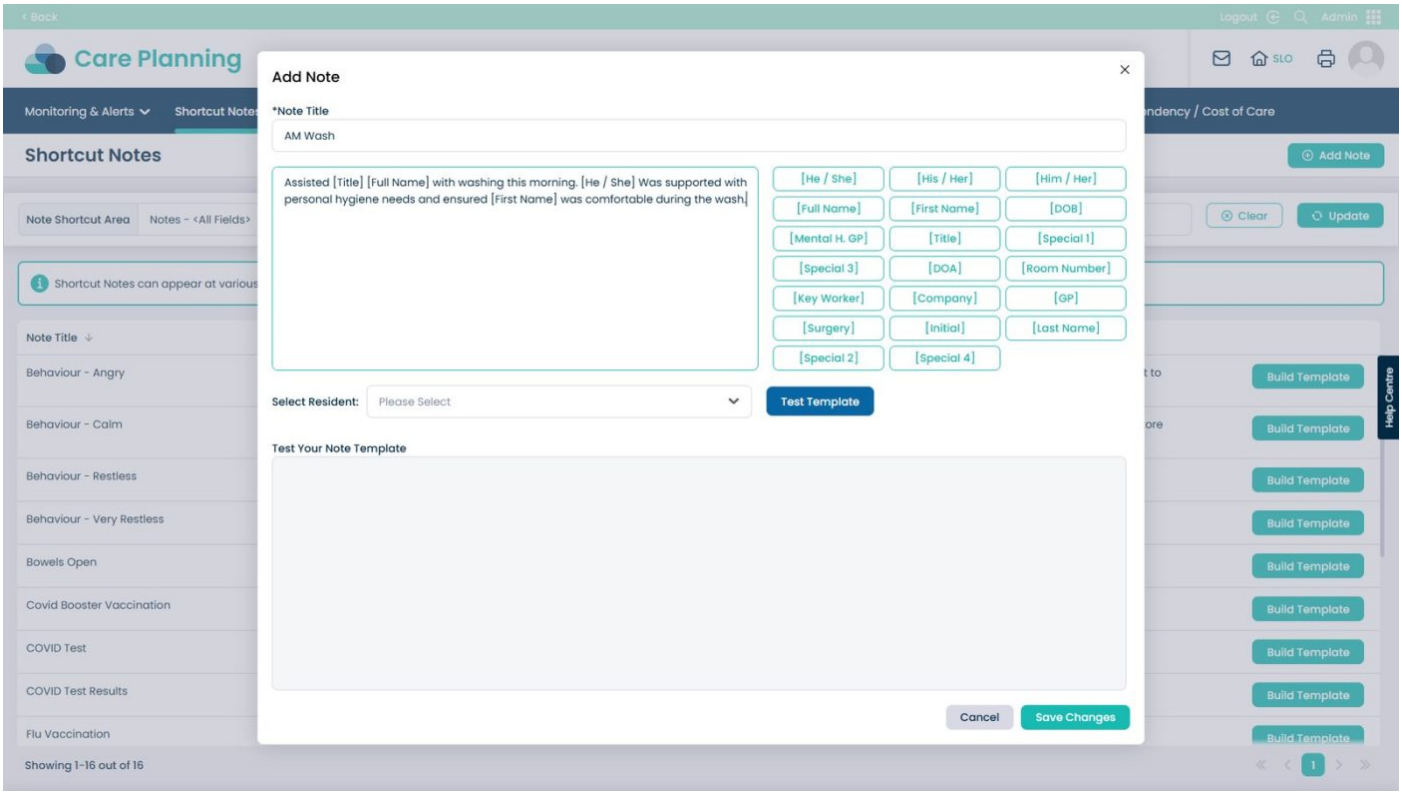
note automatically.



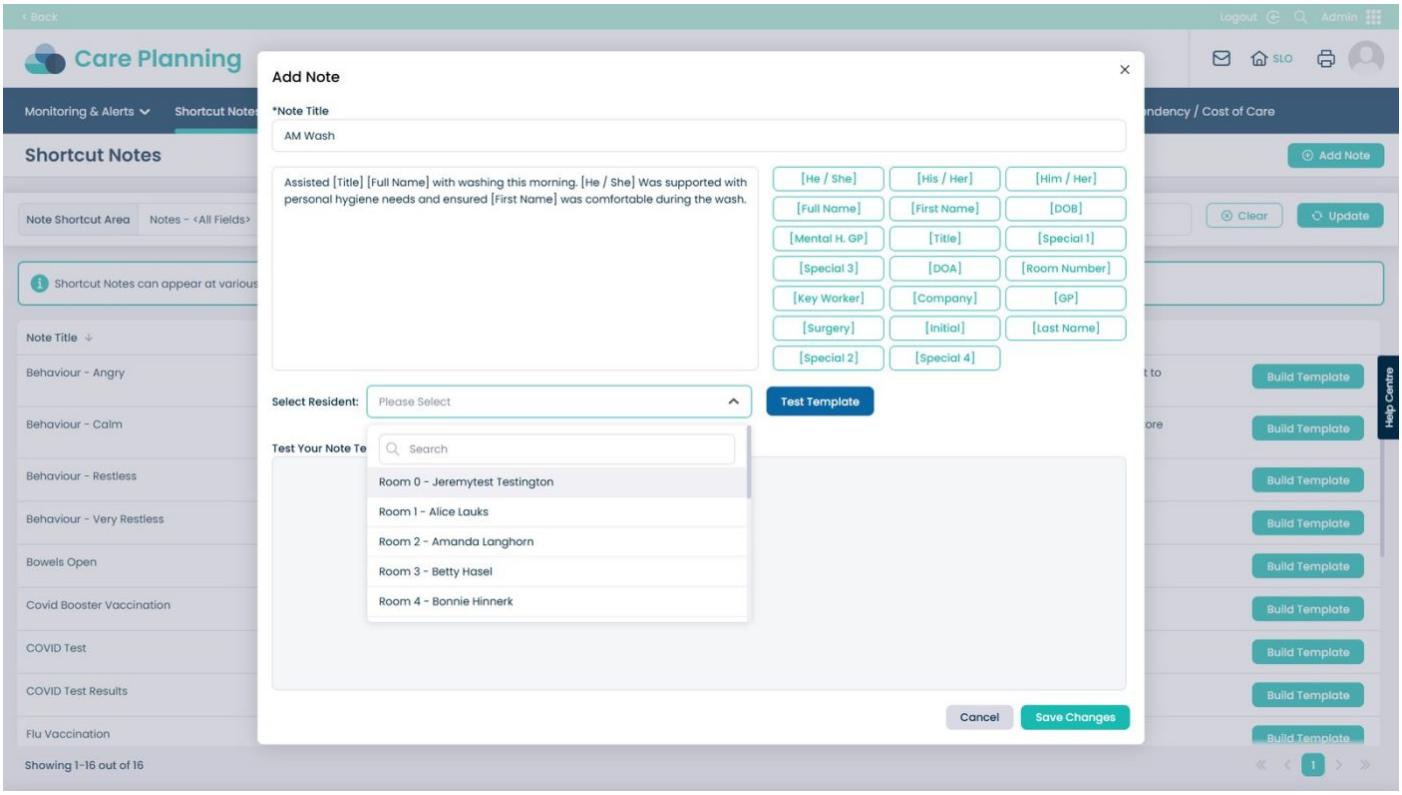
You can add as many of these selections as you like



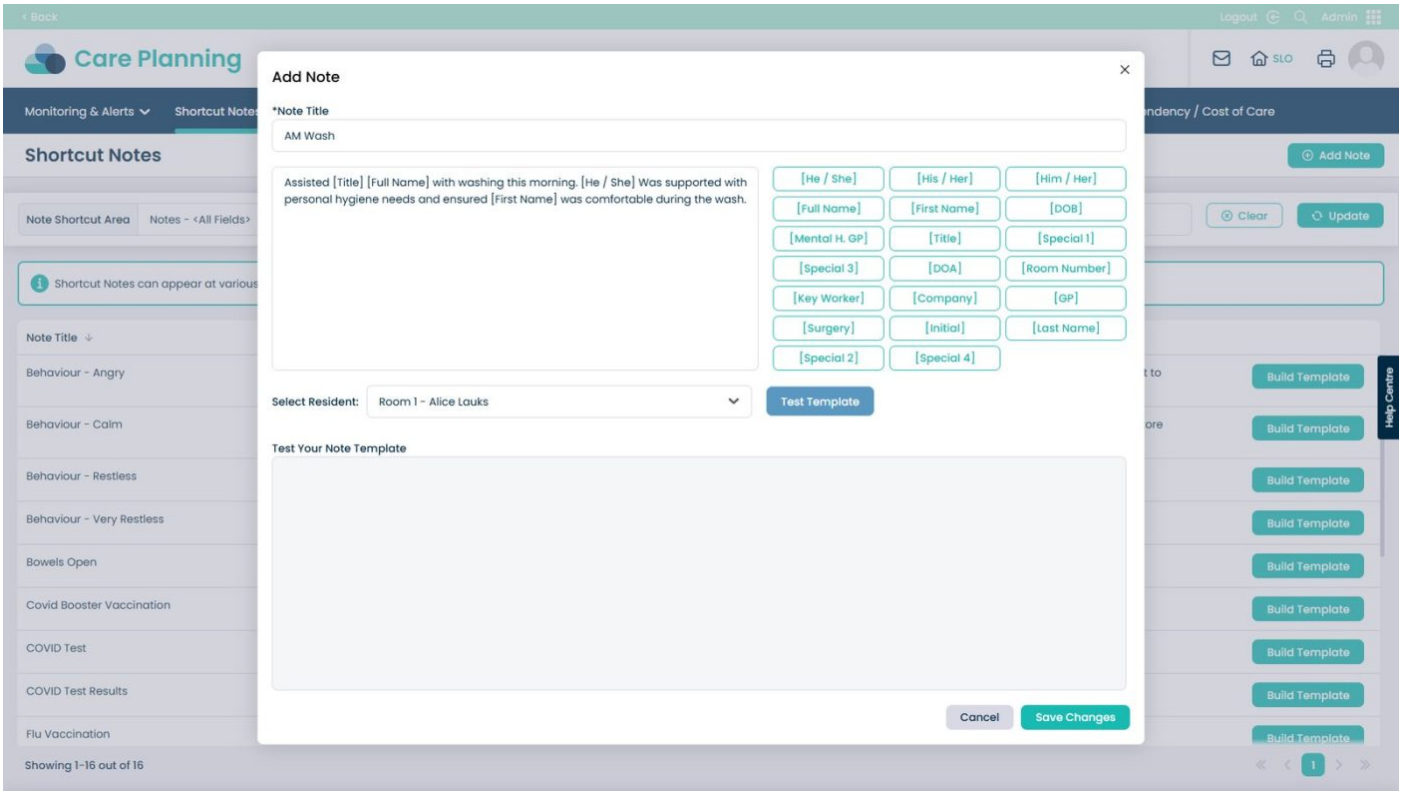
Choose the service user from this drop-down menu



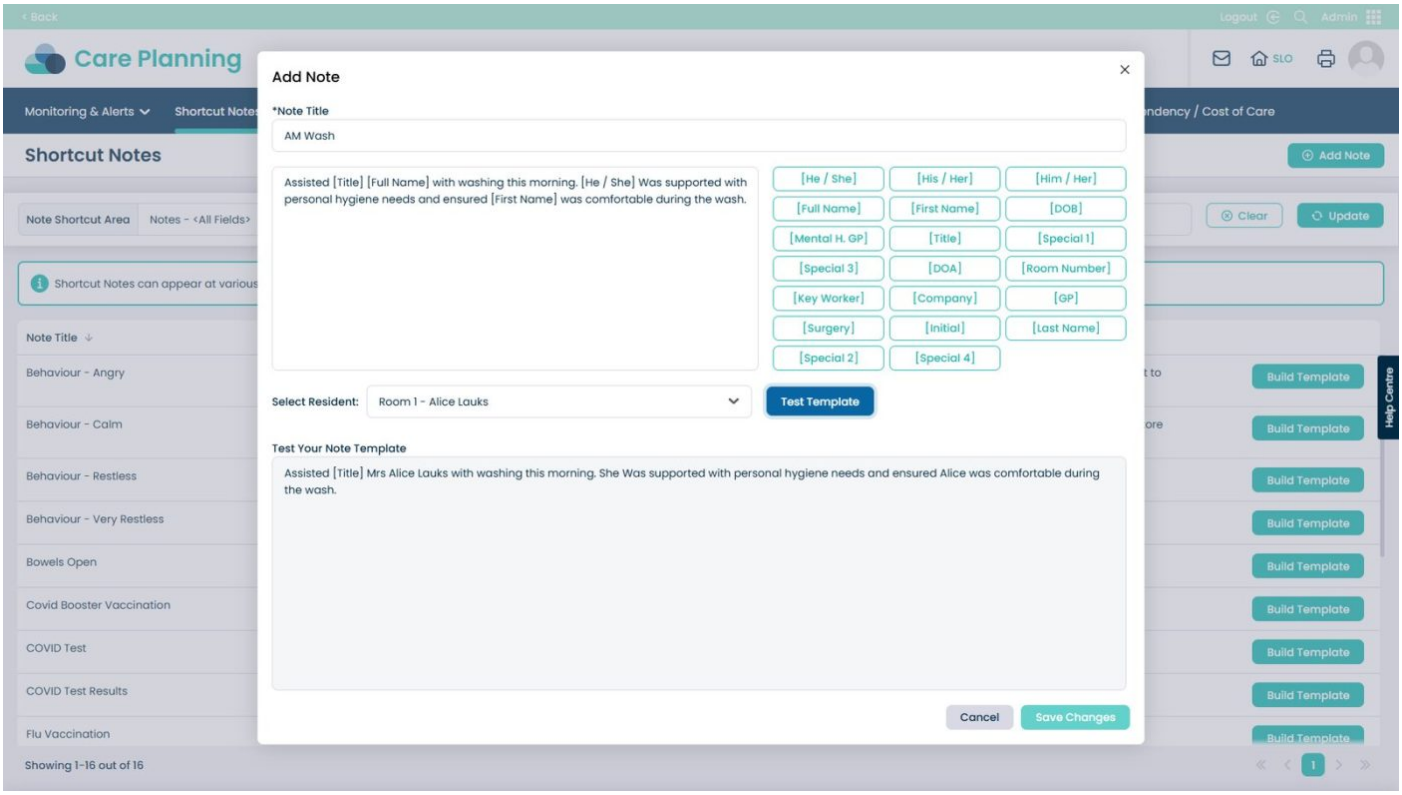
Select any you would like to test



Click Test Template to see how the template works when recorded



When you are happy with your note, click Save Changes



Was it helpful ?

- Happy
- Normal
- Sad

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