



Custom Case Note Summaries

Updated: March 21, 2025

We're excited to introduce a new feature that allows users to **customize Case Note Summaries** (also referred to as case note headers), providing **greater flexibility** in managing case notes and **improving searchability** within your Case Management System.

This feature enables users to **edit the default Case Note Summaries** for **Email, SMS, Appointments/Events, Appointment Results, Sara Video Appointments, and User-Generated Case Notes**, making it easier to tailor notes to your specific needs.

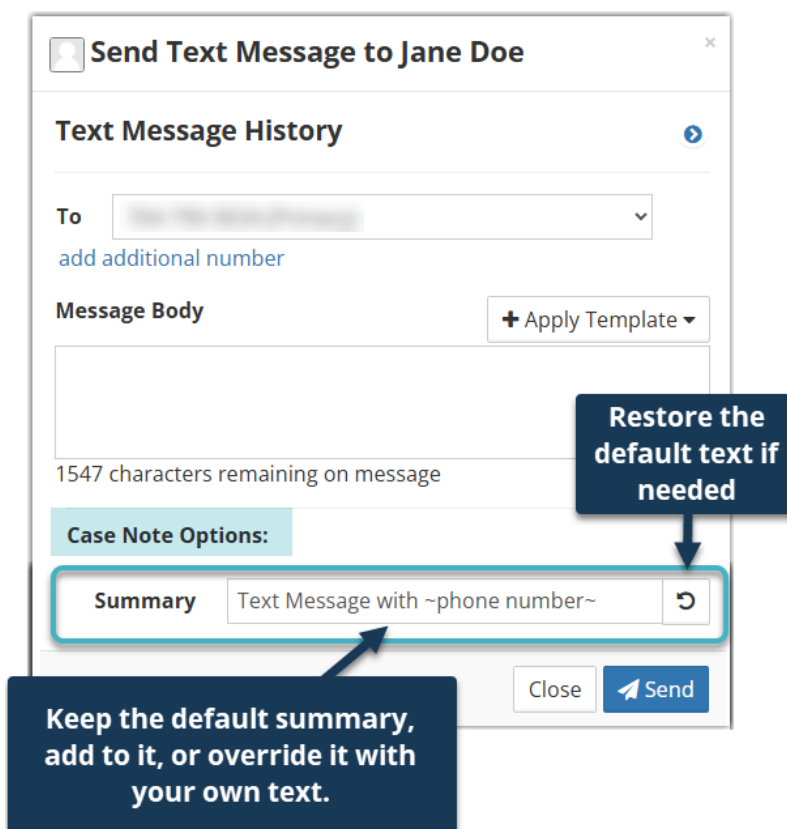
Default Case Note Summaries

By default, Case Note Summaries are automatically generated based on the type of case note. Below are the standard summaries:

Case Note Type	Default Verbiage
<ul style="list-style-type: none">Email	Email: ~subject~
<ul style="list-style-type: none">SMS	Text Message with ~phone number~
<ul style="list-style-type: none">Appointment RequestsAppointment ResultsSara Video Appointments	Appointment: ~regarding~
<ul style="list-style-type: none">Events	Event: ~event title~
<ul style="list-style-type: none">User-generated case note	Entered by ~user name~

How to Use the Custom Case Note Feature

Users can modify default case note summaries by navigating to the **Case Note Options** section at the bottom of the relevant template. The **Summary** field will be pre-populated with the default text based on the case note type. Users can either add to the default summary or override it with their own text, up to **250 characters**. If needed, they can restore the default summary by clicking the **refresh button** next to the field.



Send Text Message to Jane Doe

Text Message History

To: [Dropdown]

[add additional number](#)

Message Body [Text Area] **+ Apply Template**

1547 characters remaining on message

Case Note Options:

Summary Text Message with ~phone number~ **↺**

Keep the default summary, add to it, or override it with your own text.

Restore the default text if needed

Close **Send**

Additional Notes:

- Custom summaries **do not affect the body of the case note**—only the summary/header that appears in your CMS.
- If you leave the **Summary** field blank, the system will **automatically revert to the default verbiage**.

We are committed to enhancing your experience with Sara and look forward to your feedback on this new feature!