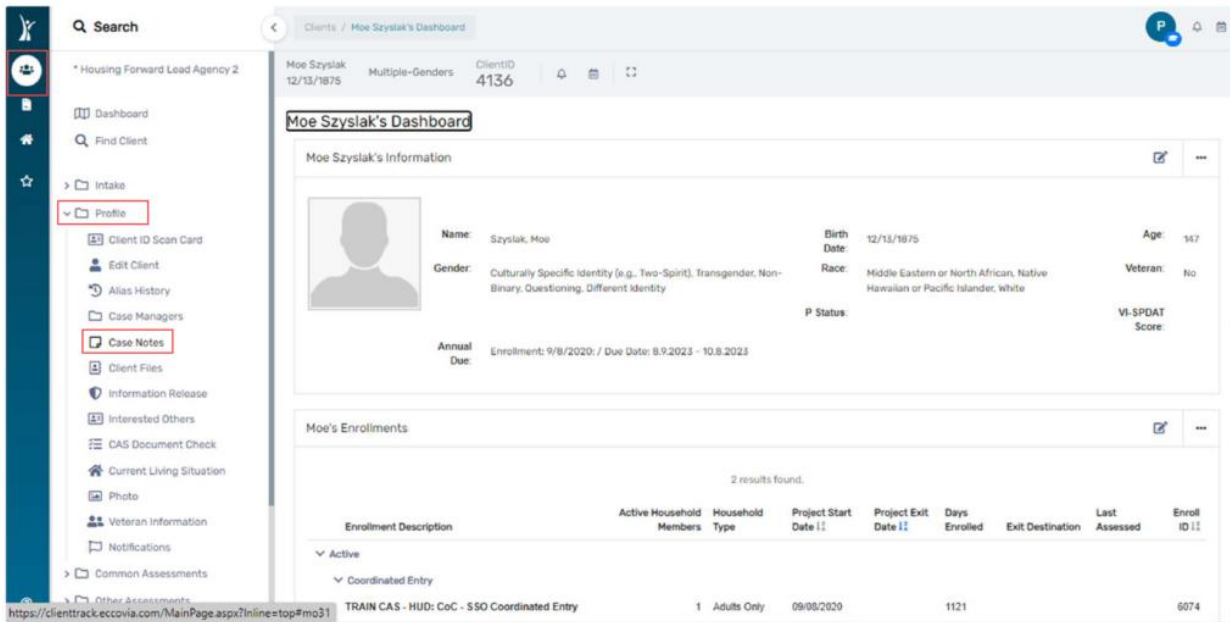


Entering a Case Note

1. Begin on your **Client Workspace** and find the client you would like to record the Case Note for in the system.
2. From the **Client workspace**, Select **Profile** from the menu on the left and then **Case Notes** from the submenu:



The screenshot shows the 'Moe Szyslak's Dashboard' in the Client Workspace. The left sidebar menu has 'Profile' and 'Case Notes' highlighted with red boxes. The main content area displays 'Moe Szyslak's Information' and 'Moe's Enrollments'.

Moe Szyslak's Information

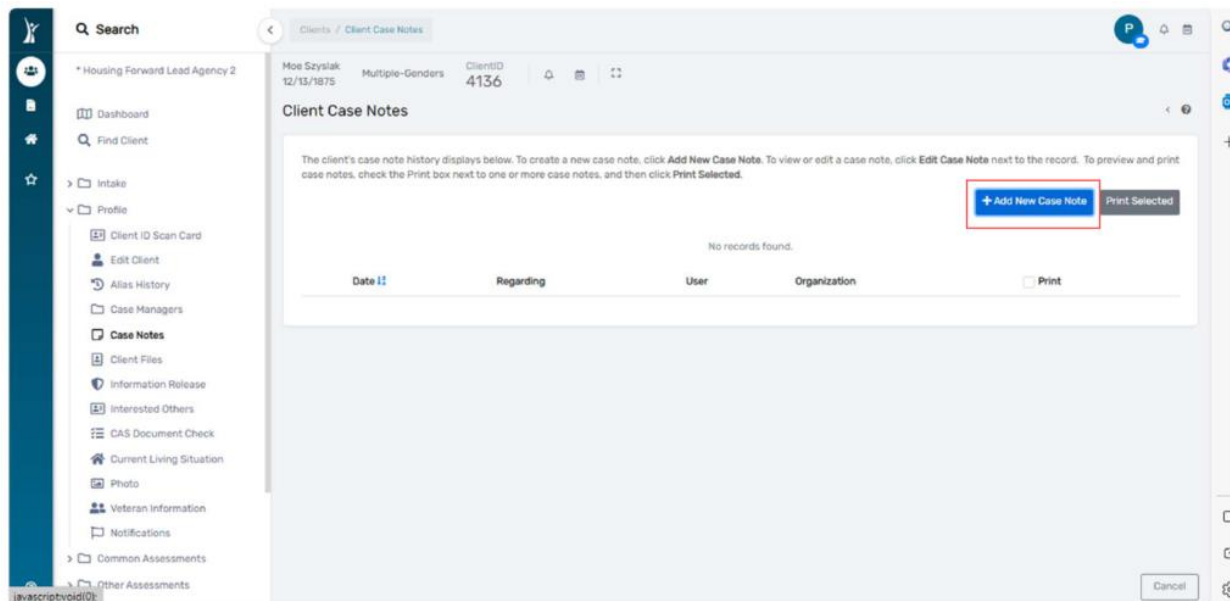
Name:	Szyslak, Moe	Birth Date:	12/13/1975	Age:	50
Gender:	Culturally Specific Identity (e.g., Two-Spirit), Transgender, Non-Binary, Questioning, Different Identity	Race:	Middle Eastern or North African, Native Hawaiian or Pacific Islander, White	Veteran:	No
Annual Due:	Enrollment: 9/8/2020 / Due Date: 8/9/2023 - 10/8/2023	P Status:		VI-SPDAT Score:	

Moe's Enrollments

2 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed	Enroll ID
TRAIN CAS - HUD: CoC - SSO Coordinated Entry	1	Adults Only	09/08/2020		1121			6074

3. On the Case Notes page, click the **Add New Case Note** button.



The screenshot shows the 'Client Case Notes' page for Moe Szyslak. The left sidebar menu has 'Case Notes' highlighted with a red box. The main content area displays a message about the case note history and a table with columns for Date, Regarding, User, Organization, and Print.

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, and then click **Print Selected**.

Add New Case Note **Print Selected**

No records found.

Date	Regarding	User	Organization	Print
------	-----------	------	--------------	-------

4. Enter a **date** (1) and a **title** (2) for the case note. Record your case note (3). Be sure to check the **Read**

Only box (4) to make the case note printable and unable to be edited by others. If a case note should be removed, be sure to uncheck the **“Read Only” box**.

test, hmis 2/15/1989 ClientID 4

Case Note

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked.

1 Entry Date: 08/11/2022

User: Haley Walton

2 Regarding:

Note Type: -- SELECT --

Template: Option not in the list

Case Note

Client Name: hmis test

3

Read Only: ☒ 4

Save Cancel

5. Enter service information and the enrollment to which you'd like this case note to attach. If you want to default the enrollment fields to a specific enrollment, select that enrollment in the Default Enrollment field before adding service information:

Housing Forward Lead Agency 2

Moe Szyslak 12/13/1975 Multiple-Genders ClientID 4136

Case Note with Services

Read Only: ☐

Services

Use the fields below to record the services provided in association with the note above.

Default Enrollment: -- SELECT --

09/08/2020 - LEAD - HUD: CoC - Youth Homeless Demonstration Program (YHDP) - SSO (not CE or Street Outreach)

09/08/2020 - TRAIN CAS - HUD: CoC - SSO Coordinated Entry

+ Service* Enrollment*

☒ -- SELECT -- -- SELECT --

☐ -- SELECT -- -- SELECT --

Save Cancel

6. Select your **services** from the drop-down fields below. Click **Save** when you are done:

Q Search

Dashboard

Find Client

Intake

Profile

Client ID Scan Card

Edit Client

Alias History

Case Managers

Case Notes

Client Files

Information Release

Interested Others

CAS Document Check

Current Living Situation

Photo

Veteran Information

Notifications

Common Assessments

Other Assessments

Clients / Client Case Notes / Case Note with Services

Moe Szyslak
12/13/1875Multiple-GendersClient ID
4136

Case Note with Services

Read Only: ☐

Services

Use the fields below to record the services provided in association with the note above.

Default Enrollment: 09/08/2020 - LEAD - HUD: CoC - Youth Homeless Demonstration Program (YHDP) - SSO (not CE or Street Outreach)

Service*

☒

Bed night

-- SELECT --

-- SELECT --

Enrollment*

09/08/2020 - LEAD - HUD: CoC - Youth Homeless Demonstration Program (YHDP) - SSO

-- SELECT --

-- SELECT --

Save

Cancel

NOTE: Medical information should never be included in case notes.