Case Notes: Folder

The “Case Notes” folder is where case notes are added to a client’s record. Please keep in mind that multiple agencies may be adding case notes to any client’s record, so labeling them with a clear and concise title helps in identifying correct case notes.

Case notes are accessible to all agencies. The information entered in a case note must fall within HIPAA guidelines. In general, each time a service* is added to the Client’s Record, there should be a case note to accompany it.

**For instructions on the “Services” folder, view Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/*Services: Folder *in the* “HMIS Basic User 2025 Manual” *for more detailed information*.

<u>Steps to Navigate to the “Case Notes” Folder Menu</u>

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the “Client Workspace”.***

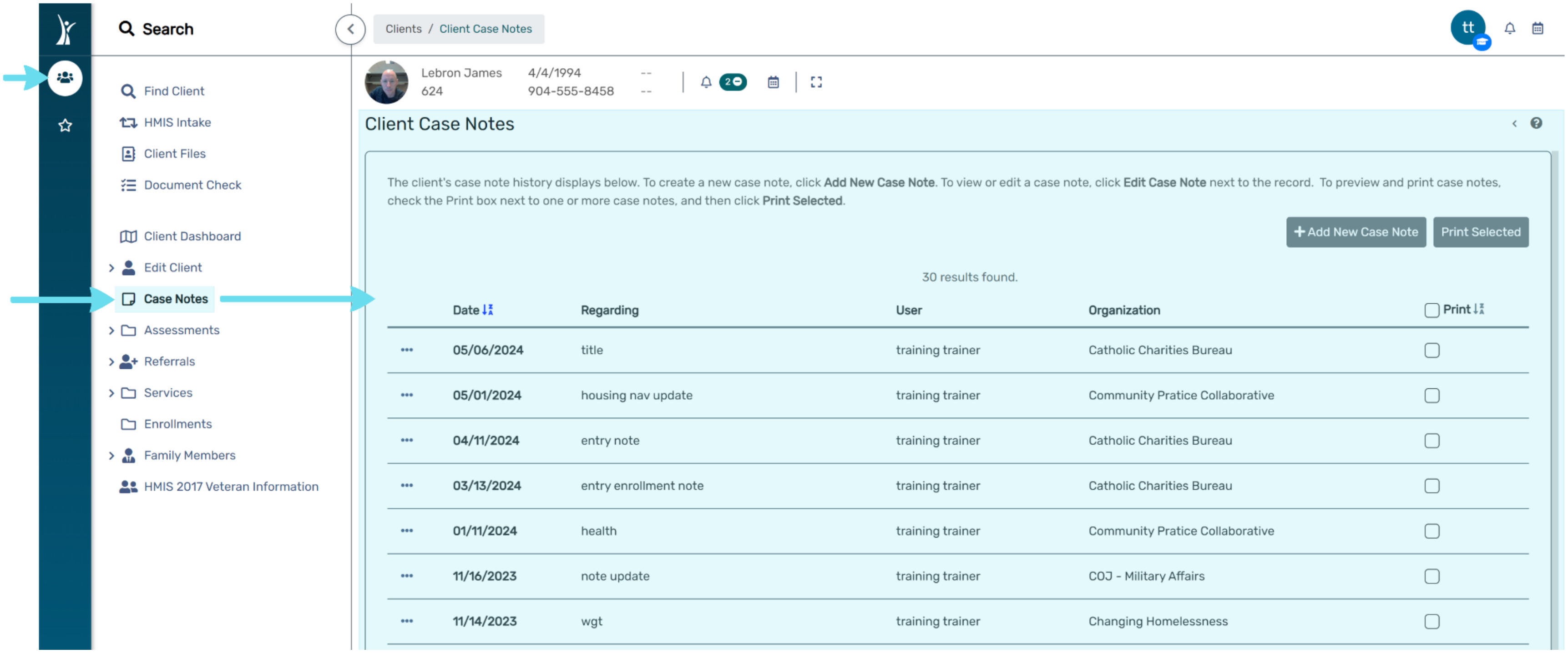
** For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* “HMIS Basic User 2025 Manual”.

*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

Step 2: Select the “Case Notes” secondary sidebar* menu option. ClientTrack will navigate to the “Client Case Notes” workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* “HMIS Basic User 2025 Manual”.



Case Notes Folder

Viewing Existing Case Notes

Steps to View Existing Case Notes

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

* *For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/*Quick Search *in the* "HMIS Basic User 2025 Manual".

** *For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

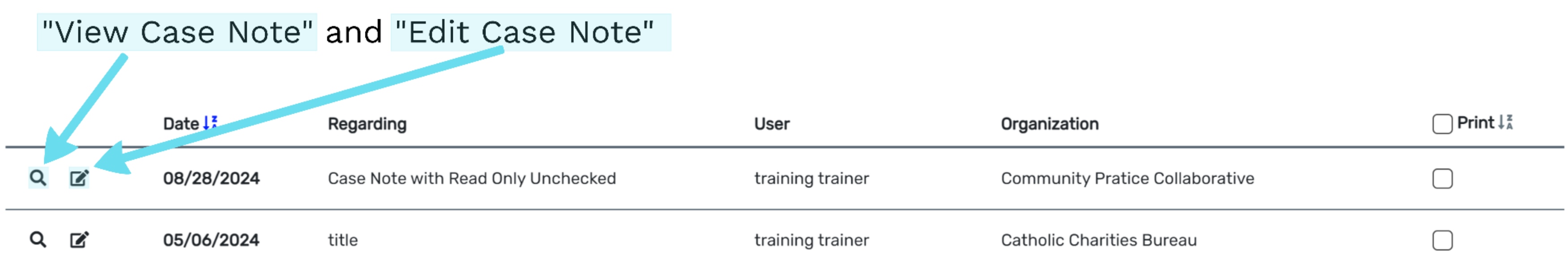
*** *To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* "HMIS Basic User 2025 Manual".

Step 2: Select the "Case Notes" secondary sidebar* menu option. ClientTrack will navigate to the "Client Case Notes" workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* "HMIS Basic User 2025 Manual".

Step 3: View the contents of a case note by clicking the search icon* next to the appropriate case note.

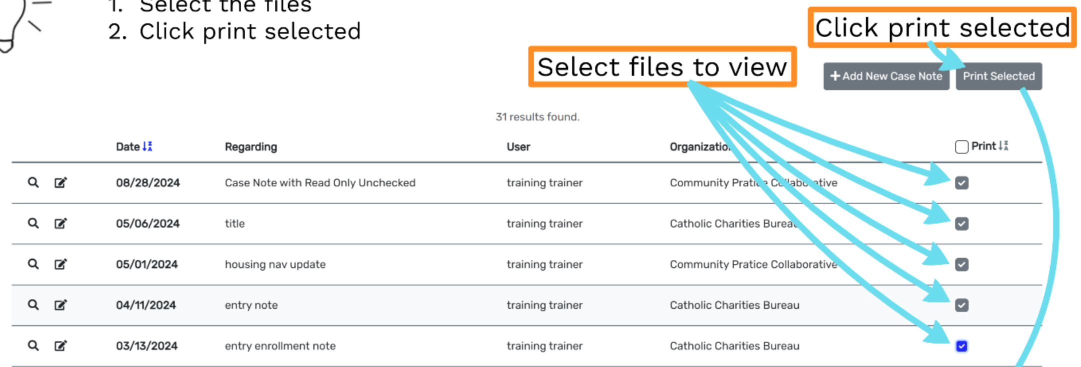
**To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/*Icons and Buttons in *the* "HMIS Basic User 2025 Manual".



View/Edit Case Note

Tips and Tricks - *View Multiple Case Notes at Once through Print Selected*

- In a scenario where multiple case notes are to be viewed as efficiently as possible:
  1. Select the files
  2. Click print selected



- A print preview of all selected case notes will be displayed.