

## 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.*

### **Steps to Navigate to the “Case Notes” Folder Menu**

**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”.*

**Client Case Notes**

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**.

30 results found.

Date	Regarding	User	Organization	Print
05/06/2024	title	training trainer	Catholic Charities Bureau	<input type="checkbox"/>
05/01/2024	housing nav update	training trainer	Community Prattice Collaborative	<input type="checkbox"/>
04/11/2024	entry note	training trainer	Catholic Charities Bureau	<input type="checkbox"/>
03/13/2024	entry enrollment note	training trainer	Catholic Charities Bureau	<input type="checkbox"/>
01/11/2024	health	training trainer	Community Prattice Collaborative	<input type="checkbox"/>
11/16/2023	note update	training trainer	COJ - Military Affairs	<input type="checkbox"/>
11/14/2023	wgt	training trainer	Changing Homelessness	<input type="checkbox"/>

*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 Case Note" and "Edit Case Note"

	Date 	Regarding	User	Organization	<input type="checkbox"/> Print 
 	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Praticce Collaborative	<input type="checkbox"/>
 	05/06/2024	title	training trainer	Catholic Charities Bureau	<input type="checkbox"/>

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

Select files to view

+ Add New Case Note

Print Selected

31 results found.

Date

Regarding

User

Organization

Print

Q

08/28/2024

Case Note with Read Only Unchecked

training trainer

Community Practice Collaborative

☒

Q

05/06/2024

title

training trainer

Catholic Charities Bureau

☒

Q

05/01/2024

housing nav update

training trainer

Community Practice Collaborative

☒

Q

04/11/2024

entry note

training trainer

Catholic Charities Bureau

☒

Q

03/13/2024

entry enrollment note

training trainer

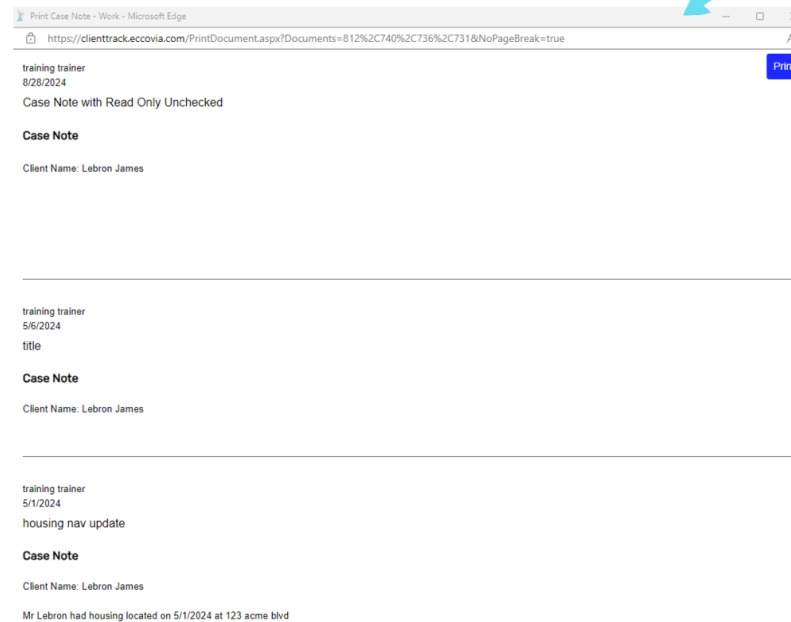
Catholic Charities Bureau

☒

Select files to view

Click print selected

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



*Tips and Tricks – View Multiple Case Notes at Once Through Print Selected*