Adding New Case Notes

<u>Steps to Adding New Case Notes</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 Information" 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: Select the "Add New Case Note" button. A blank "Case Note" form will populate.

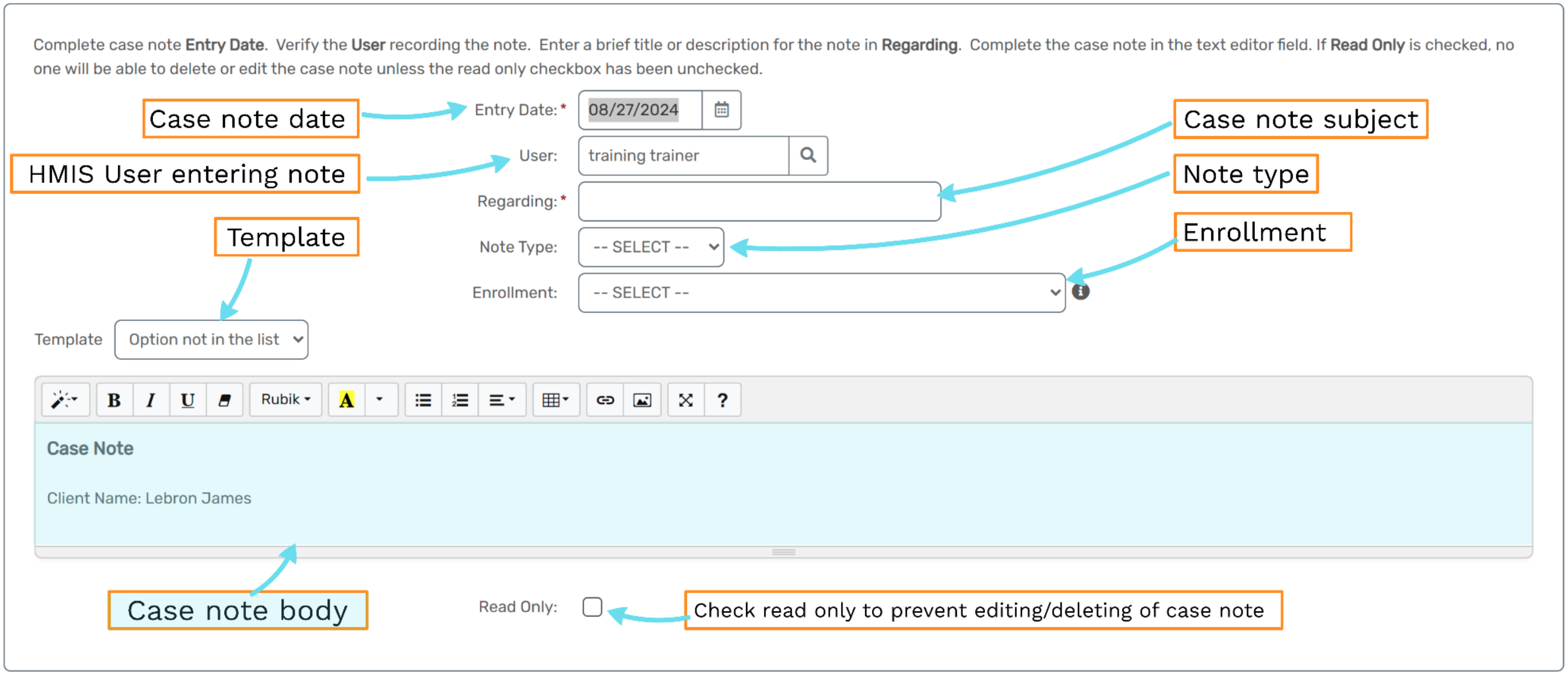
Step 4: Verify the "Entry Date" field. It will default with today's date. To change this date, click in the "Entry Date" field, delete the contents, and add the Entry Date in MM/DD/YYYY format, or click on the calendar icon and select the correct date.

Step 5: The “User” field will default to the logged in user and should not be changed. In the “Regarding” field, type a clear and concise descriptor/summary of your note for easy retrieval in the future. Optionally, you can select a category for “Note Type” and “Enrollment” from the drop down.

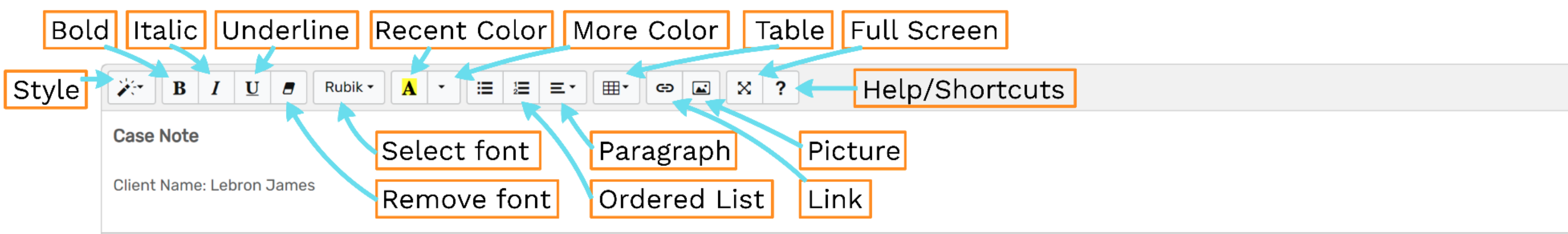
Step 6: Type a case note in the Case Note body.

Step 7: Check the “Read Only” box. This will ensure the case note cannot be edited/deleted by another user.

Case Note



Case Note Form Anatomy

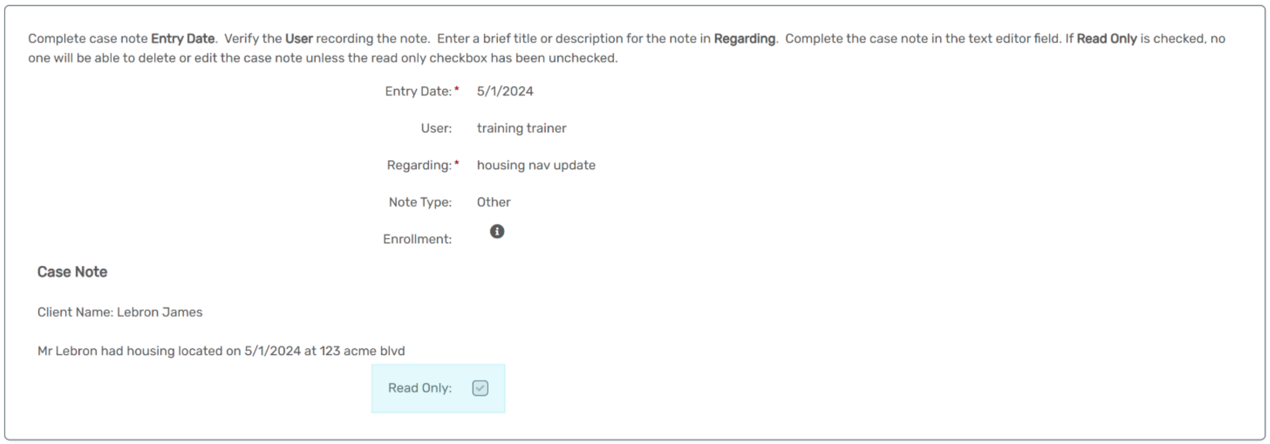


Case Note Body Menu Options

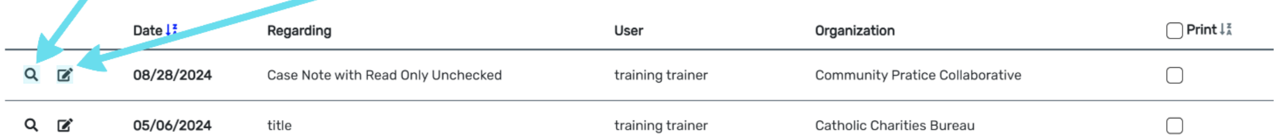
Step 8: Click “Save”. ClientTrack will navigate to the “Client Case Notes” workspace container. The case note will be viewable.

Tips and Tricks - *Checking "Read Only" on Case Notes*

- Before saving case notes, if the "Read Only" box at the bottom of the case note container screen is not checked, other HMIS users can edit the case note. It is best practice to always check "Read Only" on case notes.



"View Case Note" and "Edit Case Note"



	Date	Regarding	User	Organization	Print
	08/28/2024	Case Note with Read Only Unchecked	training trainer	Community Pratice Collaborative	
	05/06/2024	title	training trainer	Catholic Charities Bureau	

- "Edit Case Note" is an option, however, when "Read Only" has been checked, the case note is not editable and only viewable.

- If a case note needs to be deleted, the "Read Only" box needs to be unselected. Next, a ticket must be submitted or an email sent to hmis@changinghomelessness.org requesting the deletion.