Editing Case Notes

For best practices, case notes shouldn't be edited. However, where a mistake was made and needs to be corrected, editing case notes is an option.

<u>Steps to Editing Existing 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".

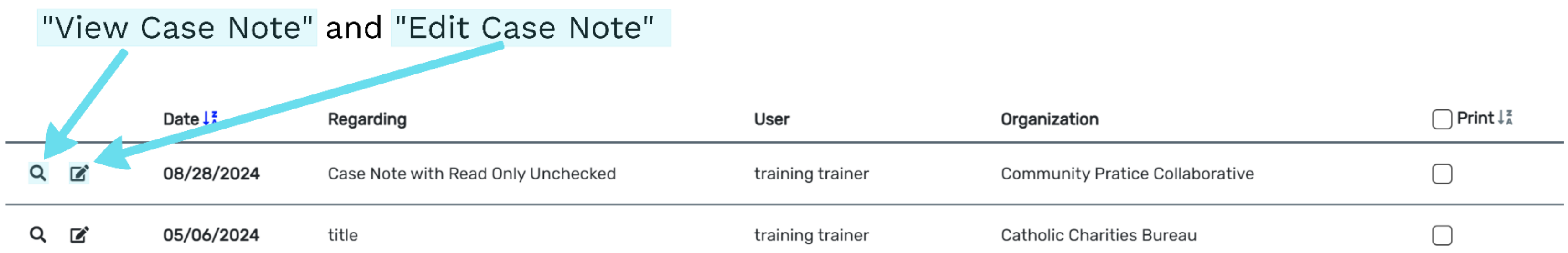
** *For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

**** 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 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: On the list displayed, click on the "edit" icon next to the case note to be edited. Select "Edit Case Note".



View/Edit Case Note

Step 4: Uncheck the "Read Only" box

Step 5: The page will reload and become editable. Update fields as applicable*, recheck the "Read Only" box.

**For instructions on how to add a new case note, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Case Notes: Folder/*Adding New Case Notes *in the* "HMIS Basic User 2025 Manual".

Step 6: Click "Save" or "Cancel". To save changes, click "Save." If no changes were made, or to cancel any changes made, click "Cancel". ClientTrack will navigate to the "Client Case Notes" page.

Deleting Case Notes

<u>Steps to Deleting 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".

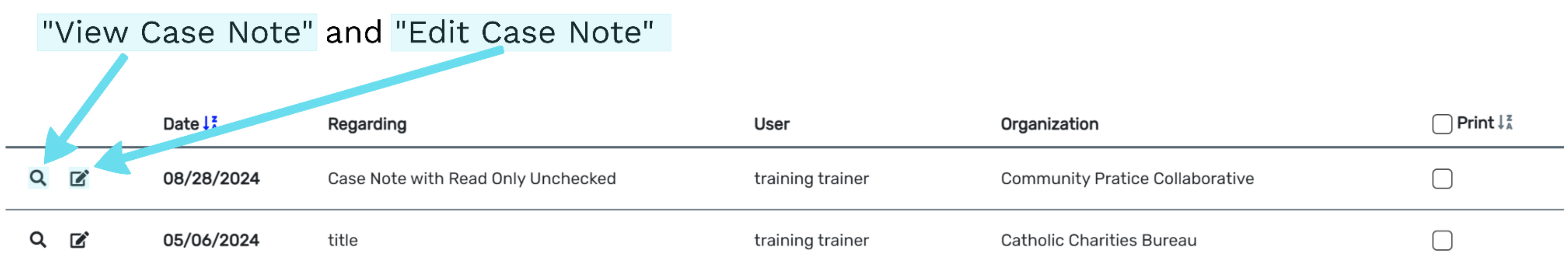
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

**** 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 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: On the list displayed, click on the "edit" icon next to the case note to be edited. Select "Edit Case Note".



View/Edit Case Note

Step 4: Uncheck the "Read Only" box

Step 5: Send a detailed email, including the client # and case note date, to hmis@changinghomelessness.org.

Printing 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".

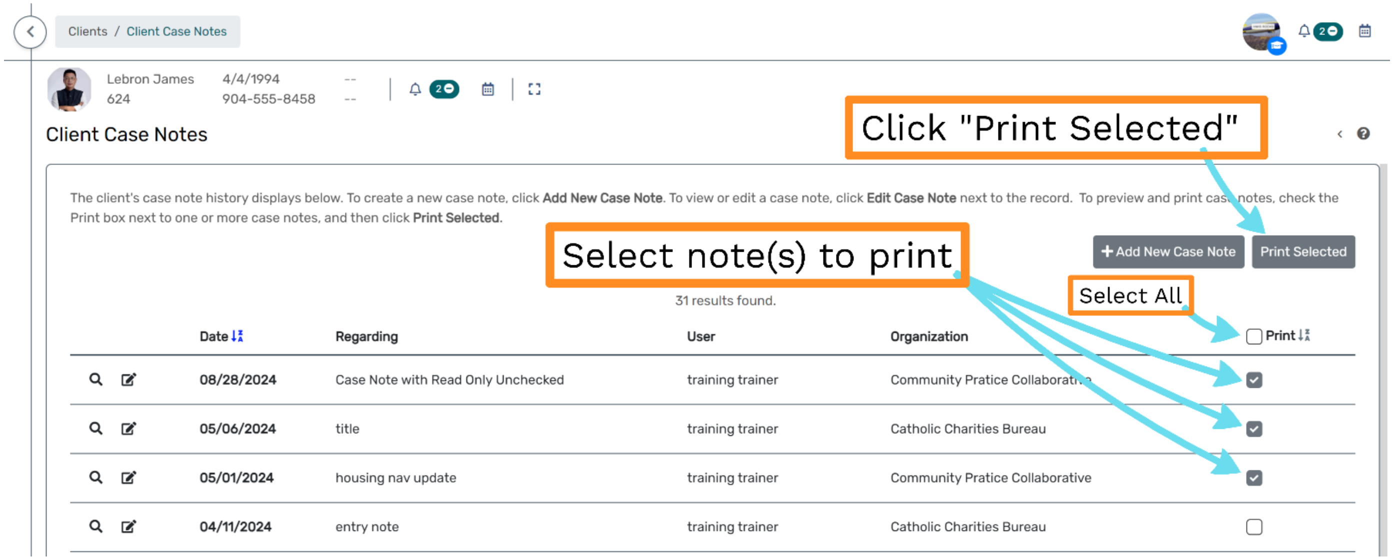
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using "Find Client" *in the* "HMIS Basic User 2025 Manual".

**** 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.

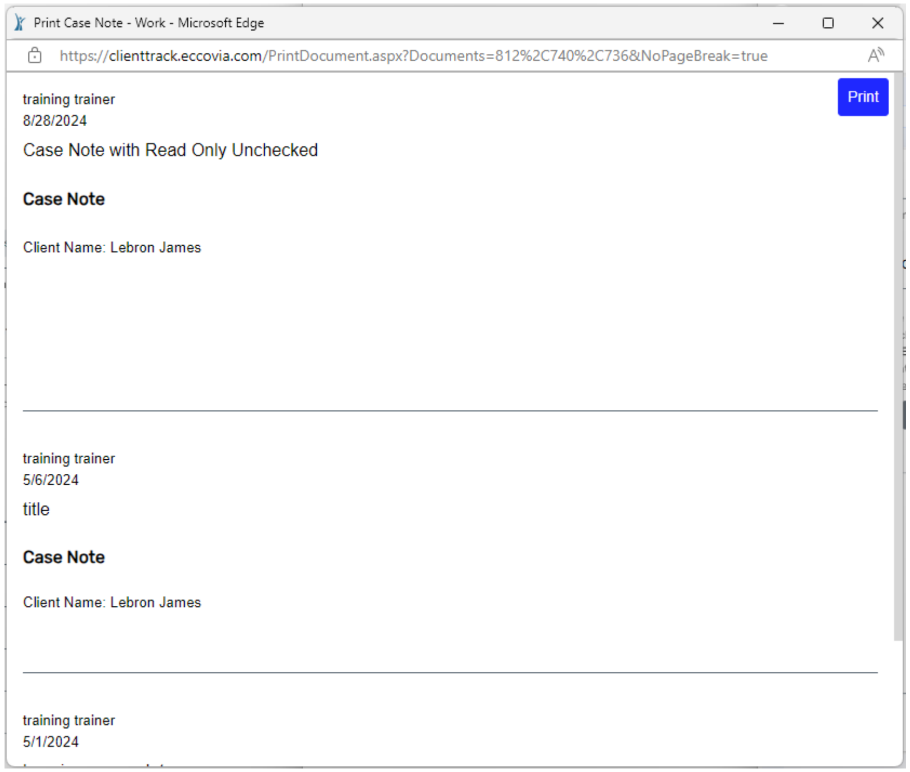
**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* "HMIS Basic User 2025 Manual".

Step 3: To print a case note, click the "Select" icon in the print column next to the appropriate file(s) and click "Print Selected". A pop-up window will appear.



Select Case Notes to Print

Step 4: Click the “Print” button. Use your local print procedures to print.



Print Case Notes