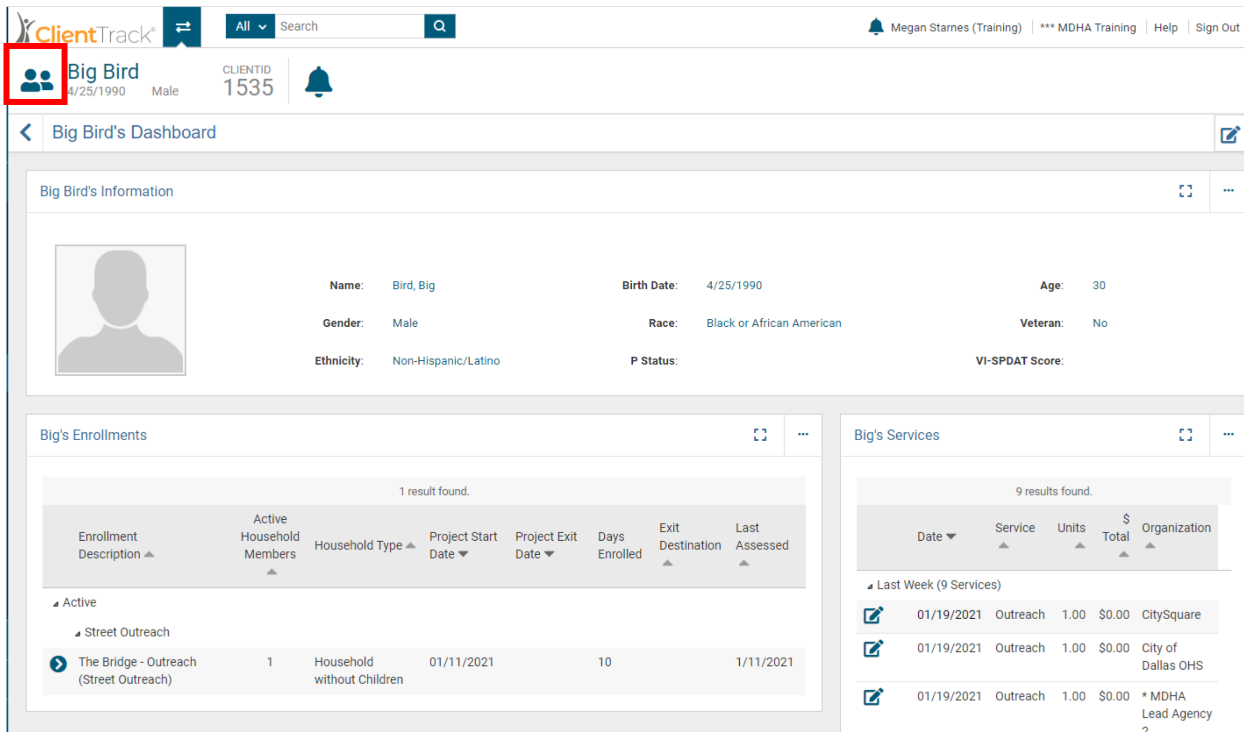
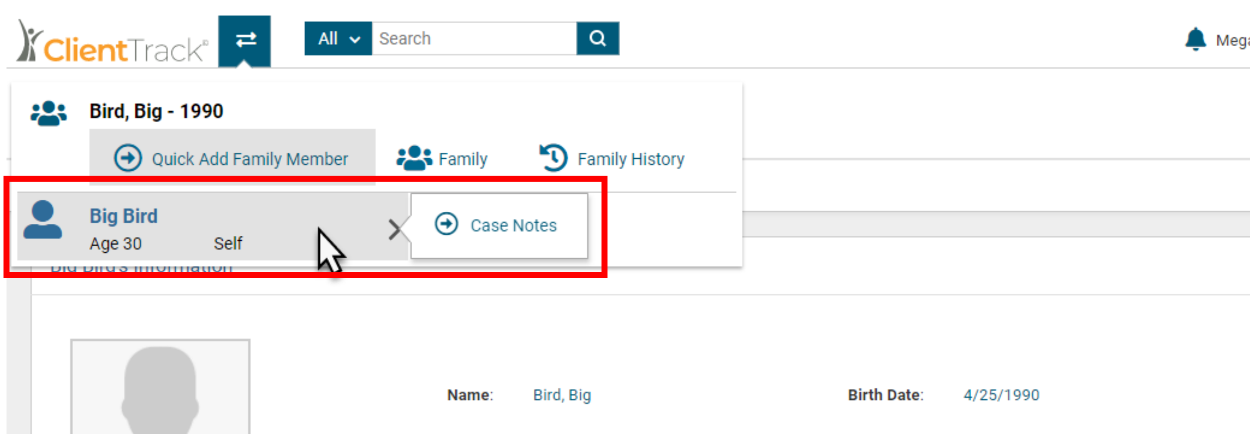
Case Notes

1. Begin on your Client Workspace and find the client you would like to record the Case Note for in the system.

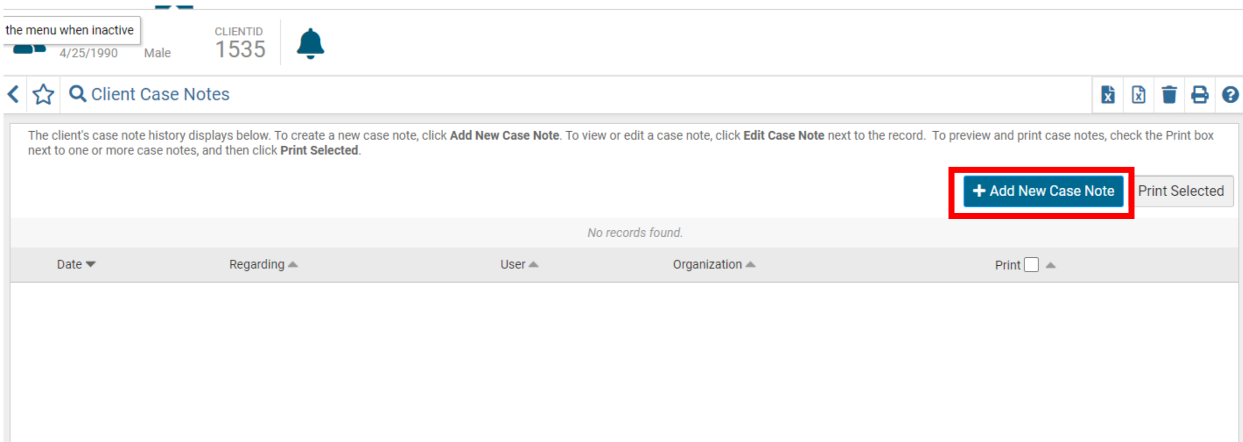
2. On the Client Dashboard, click the Household icon.



3. A menu will open with the client's name. Hover your cursor over the client's name. Click the fly out option Case Notes.



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



5. 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.

3.