

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.

The screenshot shows the ClientTrack interface. At the top, there's a navigation bar with the ClientTrack logo, a search bar, and user information (Megan Starnes (Training) | *** MDHA Training | Help | Sign Out). Below the navigation bar, the client's name 'Big Bird' is highlighted with a red box. The client's details (4/25/1990, Male, CLIENTID 1535) are visible. The main dashboard area is titled 'Big Bird's Dashboard' and contains two main sections: 'Big Bird's Information' and 'Big's Enrollments'. The 'Big Bird's Information' section displays a profile picture placeholder and client details: Name: Bird, Big; Birth Date: 4/25/1990; Age: 30; Gender: Male; Race: Black or African American; Veteran: No; Ethnicity: Non-Hispanic/Latino; P Status: ; VI-SPDAT Score: . The 'Big's Enrollments' section shows a table with 1 result found. The table has columns: Enrollment Description, Active Household Members, Household Type, Project Start Date, Project Exit Date, Days Enrolled, Exit Destination, and Last Assessed. The row shows 'The Bridge - Outreach (Street Outreach)' with 1 active household member, Household Type 'Household without Children', Project Start Date '01/11/2021', Project Exit Date '10', and Last Assessed '1/11/2021'. To the right of the dashboard, there's a 'Big's Services' section showing 9 results found. It includes a table with columns: Date, Service, Units, \$ Total, and Organization. The table shows 3 results for 'Last Week (9 Services)'. The first row shows '01/19/2021 Outreach 1.00 \$0.00 CitySquare'. The second row shows '01/19/2021 Outreach 1.00 \$0.00 City of Dallas OHS'. The third row shows '01/19/2021 Outreach 1.00 \$0.00 * MDHA Lead Agency ?'.

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.

The screenshot shows the ClientTrack interface. At the top, there's a navigation bar with the ClientTrack logo, a search bar, and user information (Mega). Below the navigation bar, the client's name 'Bird, Big - 1990' is highlighted with a red box. A menu is open below the name, showing options: 'Quick Add Family Member', 'Family', and 'Family History'. The 'Family' option is selected, and a sub-menu is open showing 'Big Bird' (Age 30, Self) with a 'Case Notes' button highlighted by a red box. Below the menu, there's a profile picture placeholder and client details: Name: Bird, Big; Birth Date: 4/25/1990; Gender: Male; Race: Black or African American.

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

The screenshot shows the 'Client Case Notes' page. At the top, there's a header with 'the menu when inactive', '4/25/1990 Male', 'CLIENTID 1535', and a bell icon. Below the header, there's a search bar with 'Client Case Notes' and several icons. A message states: '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**.' Below this message, there's a table with columns: Date, Regarding, User, Organization, and Print. The table is currently empty, with a message 'No records found.' in the center. The 'Add New Case Note' button is highlighted with a red box.

- 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.

The screenshot shows the 'Complete case note' form. At the top, there's a header with instructions: 'Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked. Record services associated with this case note using the lower portion of the form.'

1. Entry Date: * 01/21/2021 [calendar icon]
 User: * Megan Starnes [search icon]
 2. Regarding: * Housing Options
 Note Type: - SELECT - [dropdown arrow]

Supervisor Review

If a supervisor review is required, please check the box and select the name of the individual to make the assignment.

Review Required: ☐

Template: [Option not in the list v]

Case Note

Client Name: Big Bird

Enter case note information here.

3. [Red box around the text editor area]

4. Read Only: ☒ [Red box around the checkbox]