How Do I Create Client Notes?

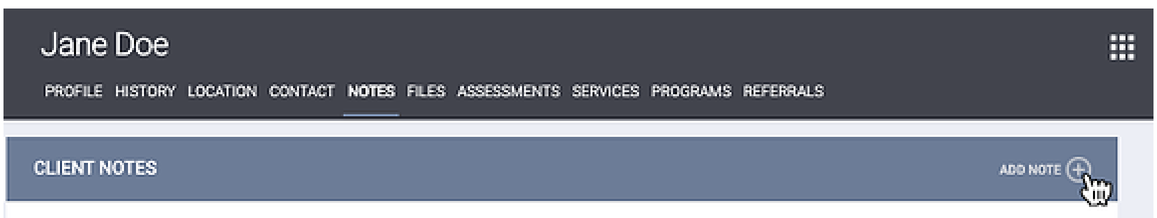
Overview

The *Notes tab* provides a way for staff members to record and share notes in a dedicated space within the client record. Depending on the agency's sharing settings and the staff member's access role, notes can be shared, edited, and deleted within and across agencies. An individual note can also be made private to the agency of the user who created it, regardless of the agency's sharing settings.

Note: *the Notes tab can be enabled or disabled in the agency's Navigation Profile and a staff member's Access Role.*

Creating Client Notes

To create a note, click the *NOTES* tab within the client record and click *ADD NOTE*.



Create a title for your note, select a date, category, and enter your note in the notes section's body. The system automatically populates the *Agency* field with your agency name (or the name of the agency you are switched into).

Note: *the Category options are determined by system administrators by editing the [note_categories] field in Field Editor. Please contact your system administrator if you need assistance determining which Category option to select.*

Optional *Time Tracking* fields are available, which allow users to record the number of hours and minutes associated with the note. An agency may use these fields to collect the time spent entering the actual note or how much time was spent on the client's session in total.

You can also make a note *Private*, which means it is only visible to staff members at your agency, regardless of the agency's sharing settings. For more information, see Making Client Data Private.

When you are done, click *ADD RECORD*.

Viewing and Modifying Client Notes

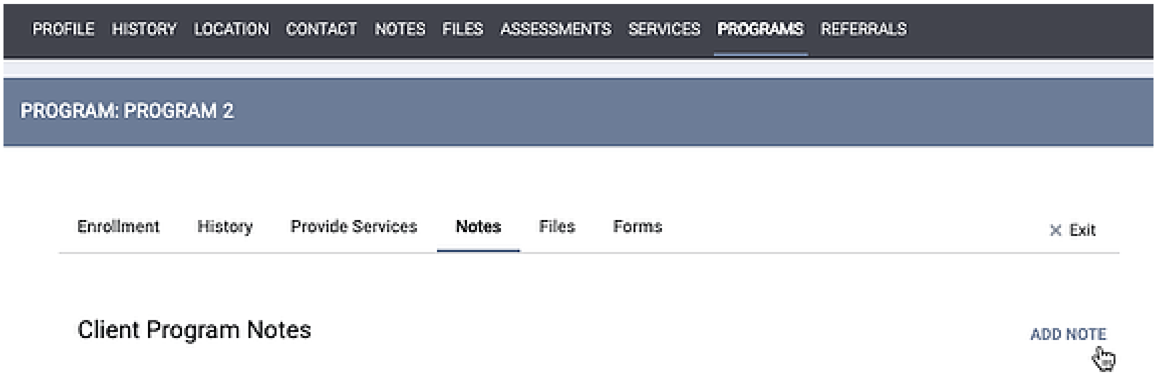
Notes available to you will display in the NOTES tab and include the name and agency of the staff member who created the note and the date it was created/last modified. Depending on your access role and the agency's sharing settings, you may have the ability to view, edit, or delete notes created by users at other agencies.

To view or edit a note, hover over the note title from the NOTES tab and click the edit icon. If *Notes* is set to "Basic Shared" by the creating agency, this option is not available to staff members at other agencies.

Program Notes

In *Program Notes*, you can add notes from the NOTES tab within a program enrollment. Notes added from within an enrollment display in both the program enrollment *Notes* tab and client level NOTES tab and can be viewed and modified in either place. The sharing of notes added from a program enrollment is subject to the creating agency's *Notes* sharing settings, not their *Service/Programs/Assessments* sharing settings.

To add a new program note, open the applicable program enrollment, navigate to the NOTES tab, and click ADD NOTE.


PROFILE
HISTORY
LOCATION
CONTACT
NOTES
FILES
ASSESSMENTS
SERVICES
PROGRAMS
REFERRALS
PROGRAM: PROGRAM 2
Enrollment
History
Provide Services
Notes
Files
Forms
Exit
Client Program Notes
ADD NOTE