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| **Summary:**  Use Add Case Notes page to record narratives of your client meetings |  |
| **Start**: **Create Case Notes record:**   * Click **New** * Select Consent, Component and Activity * Click **SAVE** |  |
| **Next**: **Create Case Note on Case Notes tab:**   * Select Staff, Date, Units; Time is optional * Enter Subject and Note text * Click **SAVE** |  |
| **Optional**: **Link to Milestone on Milestones tab:**   * Open Milestones tab * Check which Milestones will be linked to case note * Click **SAVE**   Multiple Milestones may be linked |  |
| **Optional**: **Record additional Services on Services tab:**   * Open Services tab * Check each Service received * Select Milestone to link to Service in dropdown * Click **SAVE** |  |
| **Optional**: **Send Communication to Client on Communications tab:**   * Open Communications tab * Click **NEW** * Select Type of Message and enter message text * Click **SEND** |  |
| **Optional**: **View History on Case Notes History tab:**   * Open Case Notes History tab * Select Program in dropdown   Matching Case Notes will be displayed in grid  Information of selected Note will be displayed beneath grid. |  |