|  |  |
| --- | --- |
| **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 gridInformation of selected Note will be displayed beneath grid. |  |