

## DELETING A CASE NOTE

1. Using *ClientPoint*, find a client and click the name to pull up the **Client Profile** screen. (See Figure 1-55)

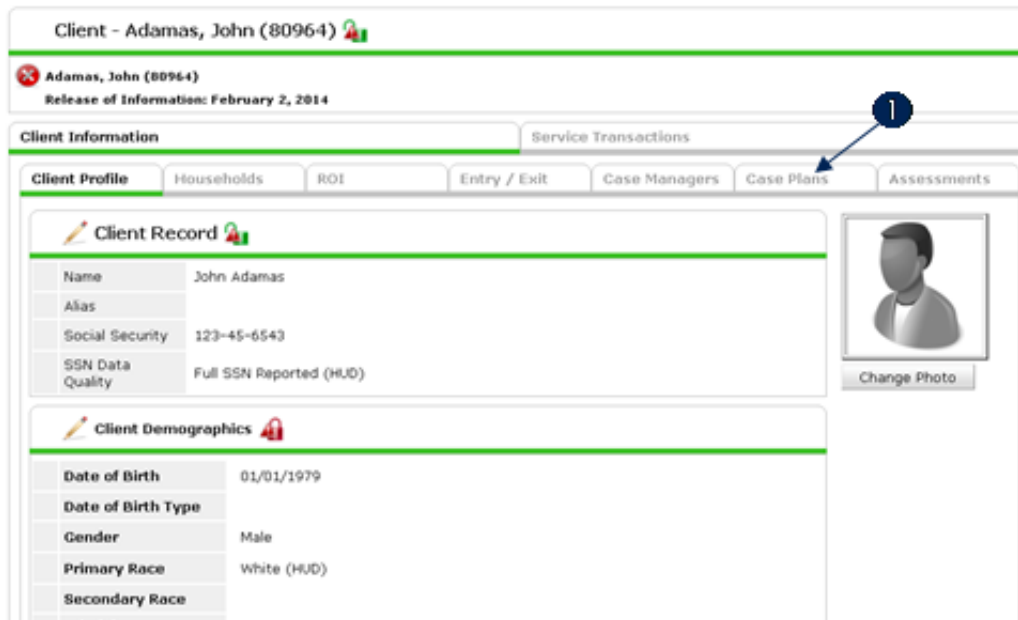


Figure 1-55

2. From the **Client Profile** screen, click the **Case Plans** link. (1) The screen will refresh and display a list of current goals. (See Figure 1-56)

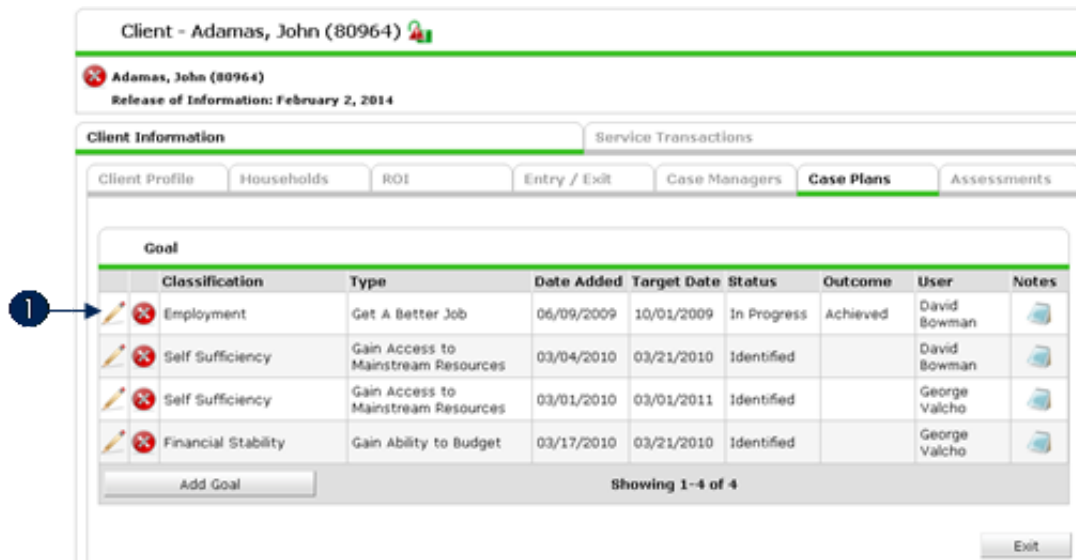


Figure 1-56

3. Each listed **Goal** includes its basic information. This allows you to quickly identify the goal you wish to manage and view its **Target Date**.
4. Click the **pencil icon** to the left of the goal title. (1) The screen will refresh and display the goal

information. (See Figure 1-57)

The screenshot displays a software interface with three main sections:

- Case Notes:** A table with columns: Provider, Note Date, Note. It contains one entry: Bowman Center, 06/10/2009, This is a goal for a client. A callout '1' points to the section header, and callout '2' points to a red X icon in the first column.
- Action Steps Planned:** A table with columns: Action Step, Target Date, Status, Outcome. It contains three entries: Send Resume to 10 employers (05/18/2010, In Progress), Write a Resume (04/18/2010, In Progress), and Compile list of possible solutions (04/04/2010, In Progress). Each entry has a red X icon in the first column.
- Service Items for this Goal:** A table with columns: Date Set, Created By, Need Type, Status, Outcome. It contains one entry: 03/01/2010, David Bowman, Basic Needs, Identified.

Buttons at the bottom include: Add Case Note, Add Action Step, Add Service, Save Goal, Save & Exit, and Exit. The status 'Showing 1-1 of 1' is displayed for each section.

**Figure 1-57**

5. Scroll down to the **Case Notes** section. **(1)**
6. Click the **Red X** icon to the left of the case note. **(2)** A warning window will appear stating the following, "Are you sure you want to delete this Case Note?" (See Figure 1-58)

The dialog box has a title bar that says "Please Confirm" with a red X icon in the top right corner. The main content area contains a red warning triangle icon followed by the text "Are you sure you want to delete this Case Note (#1)?". At the bottom, there are two buttons: "Yes" and "No". A callout '1' points to the "Yes" button.

**Figure 1-58**

7. Click **Yes** to continue. **(1)** The screen will refresh and the **Case Note** will no longer be listed in the **Case Notes** section.