

Case Notes

Once you are in the [Case Plans](#) section of the **Client Profile** screen, you can add case notes. Case notes can be added to a goal after the goal has been added to the system. Scroll down to the **Case Note** section and follow the steps below. (See Figure 1-20)

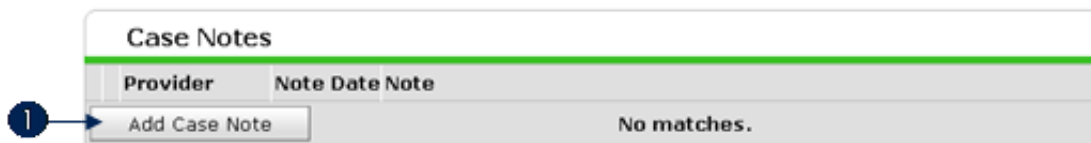


Figure 1-20

1. Click **Add Case Note**. **(1)** The **Case Note Data** window will display. (See Figure 4-7)

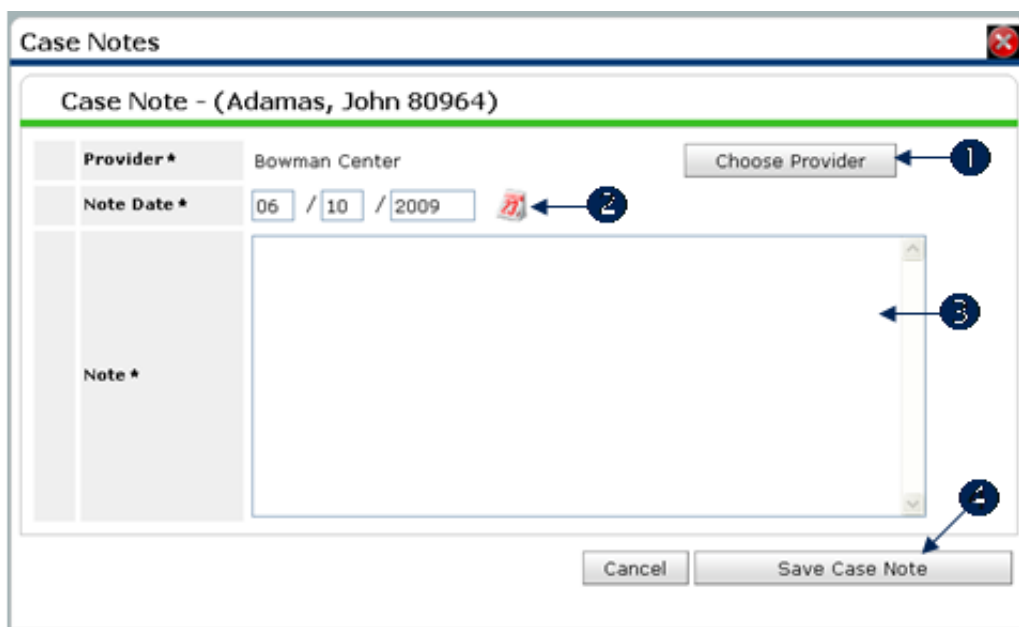




Figure 1-21

2. Complete the following fields:
 - a: **Provider**: By default, the **Provider** associated with the goal will display; however, the provider can be changed by clicking **Choose Provider**. **(1)**
 - b: **Note Date** **(2)**: By default, the **Note Date** field is populated with the current date and time; however, you may change the date here. The date must be entered in mm/dd/yyyy format.
 - c: **Note** **(3)**: Enter the **Case Note** into the **Note** field.
3. Click **Save Case Note**. **(4)** The **Case Note Data** window will close. The new case note will be listed in the **Case Notes** section on the **Goals** screen. (See Figure 1-22)

Case Notes			
	Provider	Note Date	Note
 	Bowman Center	06/10/2009	This is a goal for a client

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Figure 1-22