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)

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)

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
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)

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