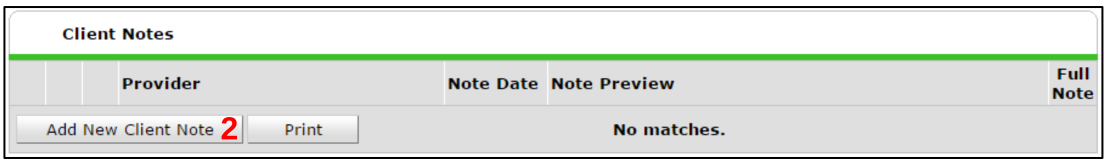
How to Add a Client Note

This feature is also known as the non-confidential pop-up messaging system. By adding a client note on the client profile tab, the next user to open the client profile will receive the message via a pop-up window.

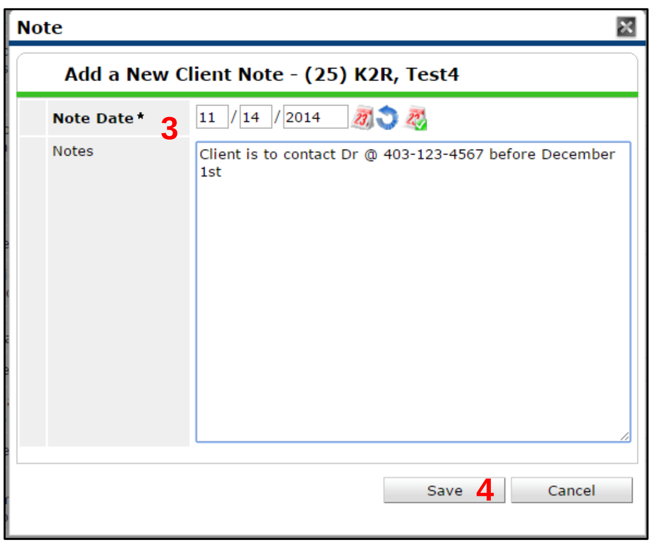
⚠ This should be used to enter non-confidential messages **do not** use it to enter daily case notes or enter confidential information.

How to Add a Note

1. Open the client profile



2. Scroll to the bottom and click Add New Client Note
3. Fill in the Note Date & Message
4. Click Save



The client note will pop-up as a message whenever a user opens the clients profile and also when the client is selected for ShelterPoint check-in.

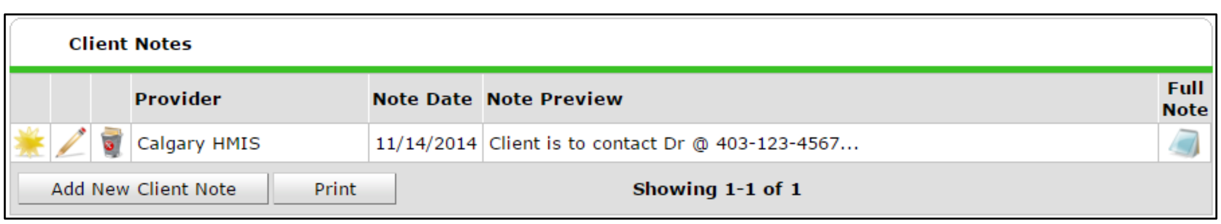
Note has not been read

Note has been read (will no longer pop up)

Allows you to edit the note

Will delete the note for ALL users

Allows you to read the full note



Once the note has been communicated to all staff and/or the client, mark the note as “Read” by clicking the yellow star icon. The icon will turn grey and users will no longer have it pop-up.