

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

Client Notes				
	Provider	Note Date	Note Preview	Full Note
Add New Client Note 2		Print		
No matches.				

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

Note

Add a New Client Note - (25) K2R, Test4






Note Date* **3** 11 / 14 / 2014





Notes

Client is to contact Dr @ 403-123-4567 before December 1st

Save **4** Cancel

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

Client Notes				
	Provider	Note Date	Note Preview	Full Note
  	Calgary HMIS	11/14/2014	Client is to contact Dr @ 403-123-4567...	
Add New Client Note		Print		
Showing 1-1 of 1				

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.