# PURPOSE

This instruction aid covers creating, editing and deleting client notes and alerts. Notes may be added during client visits or when a client record is created or updated.

# AUDIENCE

Agency employees and volunteers who record client visits to a food pantry

# PREREQUISITES

1. User Log In & Password Reset
2. Search Client Record
3. Record Service Visit

# INSTRUCTION STEPS

|  |  |  |  |
| --- | --- | --- | --- |
|  | New TEFAP | New CSFP | New Pantry |
| (B) Search Client Record |  |  |  |
| 1. Create a Note from Notes tab
 |  |  |  |
| 1. Create an Alert from Notes tab
 |  |  |  |
| 1. Create a Note from the Services tab
 |  |  |  |
| 1. Create an Alert from the Services tab
 |  |  |  |
| 1. Edit or Delete a Note
 |  |  |  |

## Revision History

Nov 19, 2018 Initial Release

Dec 2, 2022 Re-release; update Dashboard / Case Management screen

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| 1. **Create a Note from the Notes tab**
 |
| 1. Click on NOTES tab at top of page
 |  |
| 1. Select “New Note” on the right side of the page
 |   |
| 1. Enter the note text in the comment box
 |  |
| 1. Select Save
 |  |
| 1. The note will appear in the Notes screen
 |  |

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| 1. **Create an Alert from the Notes tab**
 |
| 1. Click on NOTES tab at top of page
 | Logo  Description automatically generated with medium confidence |
| 1. Select “New Note” on the right side of the page
 |   |
| 1. Enter the note text in the comment box
 |  |
| 1. Click “Mark this note as an alert” if you want it to appear on the client Personal screen
 |  |
| 1. Click “Mark this note as private” unless the Alert text applies to other pantries
 |  |
| **RULE: Alerts for your agency should be marked as Private. Otherwise, everyone who searches for the client record will see the Alert** |
| 1. Select Save
 |  |
| 1. The Alert will appear in the Notes screen AND at the top of every screen of the client’s record
 |  |

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| 1. **Create a Note from the Services tab**
 |
| 1. Click on SERVICES tab at top of page
 |  |
| 1. Eligible Services appear as Blue boxes. Click in the desired service for this visit.
 | Graphical user interface, website  Description automatically generatedGraphical user interface, website  Description automatically generated Graphical user interface, website  Description automatically generated  |
| 1. Check the reason or reasons for today’s visit. If client has not stated a reason, check “Ongoing Need”
 | Graphical user interface, text, application  Description automatically generated |
| 1. Scroll down to “Additional Notes/Information”
 |  |
| 1. Enter the note text in the comment box
 |  |
| 1. Select Save
 |  |
| 1. The note will appear in the Notes screen
 |  |

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| 1. **Create an Alert from the Services tab**
 |
| 1. Click on SERVICES tab at top of page
 |  |
| 1. Eligible Services appear as Blue boxes. Click in the desired service for this visit.
 | Graphical user interface, website  Description automatically generatedGraphical user interface, website  Description automatically generated Graphical user interface, website  Description automatically generated  |
| 1. Check the reason or reasons for today’s visit. If client has not stated a reason, check “Ongoing Need”
 | Graphical user interface, text, application  Description automatically generated |
| 1. Scroll down to “Additional Notes/Information”
 |  |
| 1. Enter the note text in the comment box
 |  |
| 1. Click “Mark this note as an alert” if you want it to appear on the client Personal screen
 |  |
| 1. Click “Mark this note as private” unless the Alert text applies to other pantries
 |  |
| **RULE: Alerts for your agency should be marked as Private. Otherwise, everyone who searches for the client record will see the Alert** |
| 1. Select Save
 |  |
| 1. The Alert will appear in the Notes screen AND at the top of every screen of the client’s record
 |  |

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| 1. **Edit or Delete a Note**
 |
|  **HINT: Notes and Alerts should be  deleted as soon as the reason has  been addressed** |  |
| 1. Click on NOTES tab at top of page
 | Logo  Description automatically generated with medium confidence |
| 1. Select the Note to be edited or deleted
 |  |
| EDIT |
| 1. Select the Edit button
 |  |
| 1. Enter the note text in the comment box
 |  |
| 1. Select Save
 |  |
| EDIT |
| 1. Select the Delete button
 |  |
| 1. Confirm you want to delete the note

 **NOTE: This a permanent action that  cannot be undone** |  |