# 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 generated  Graphical 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 generated  Graphical 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** |  |