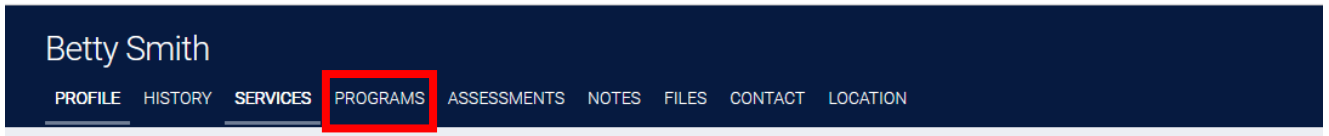


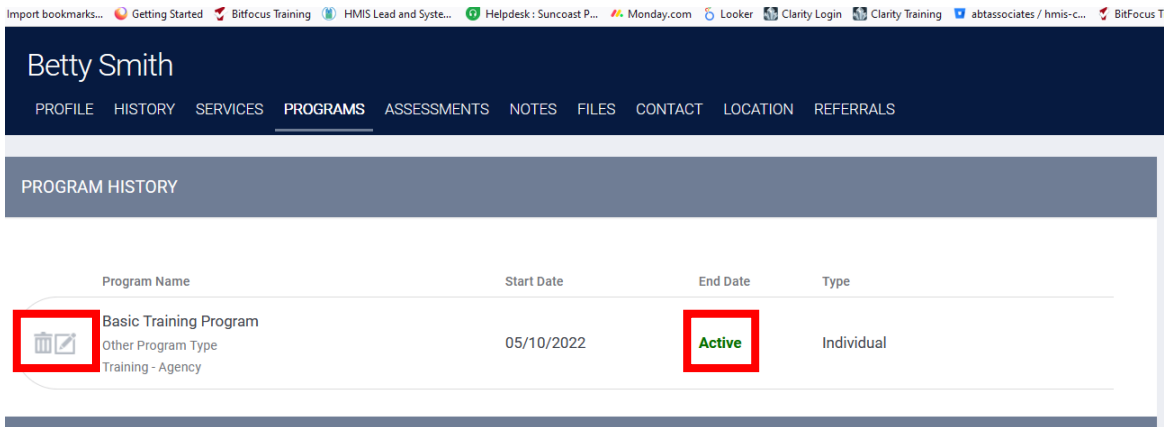


Step-by-Step: Add Program Notes

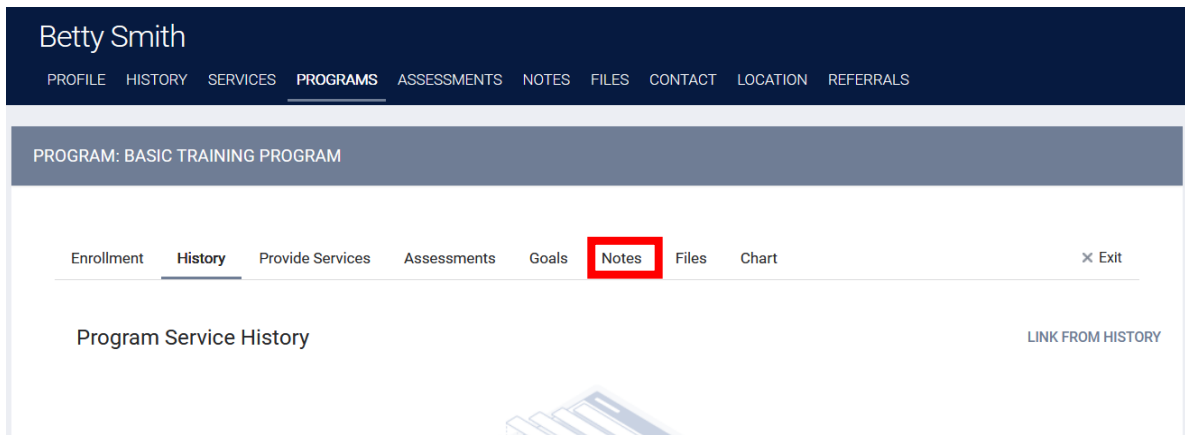
1. Log into CSIS.
2. Search for the client or utilize your Caseload screen to locate your client.
3. Click on the **“PROGRAM”** text along the top of the screen



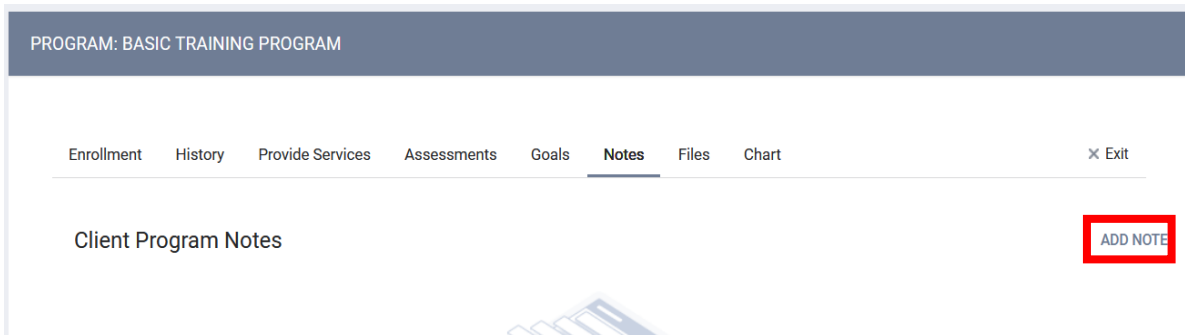
4. The client’s Program History screen will appear. In the Program History selection, select the active program you wish to update client status/information in by hovering mouse on program and clicking the pencil to the left of the program



5. The programs service history screen will appear. Click on the **“Notes”** text along the top of the screen



6. Clicking on the **“Add Note”** text to the right.





7. Enter “**Title**” and select “**Category**” from drop down. You can also time track here as well as in the case management service if your agency does so.

After typing your notes, select “**Private**” to keep the notes private within your agency.

Click on “**Add Record**” at the bottom of screen.

Betty Smith

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Enrollment History Provide Services Assessments Goals **Notes** Files Chart × Exit

CLIENT NOTES

Title _____

Category Select ▼

Agency Training - Agency

Date 05/12/2022 **Time Tracking** Select ▼ Select ▼

Note

B **I**

Private

ADD RECORD **CANCEL**