

Creating Person Notes

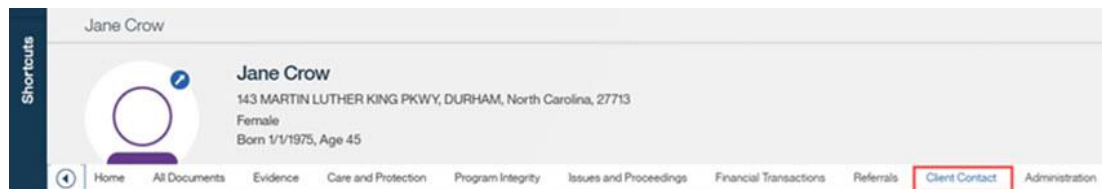
Last Updated: 03/13/2020

Overview

This job aid describes how to create notes on the Person page.

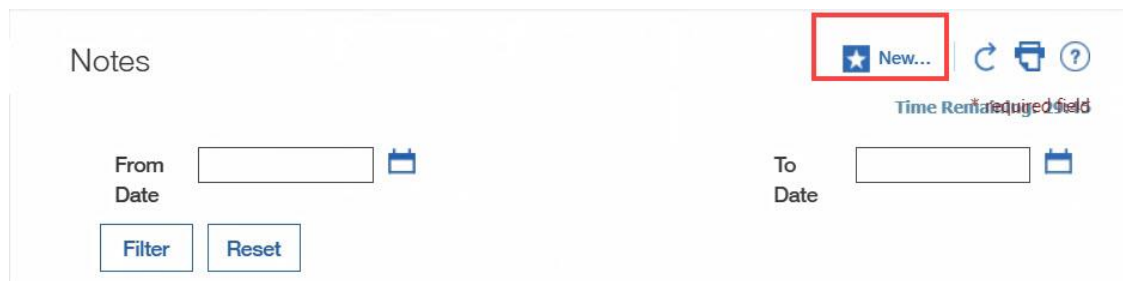
Step-by Step Instructions

1. Navigate to the Person page. Click the **Client Contact** tab.



Note: For navigation steps to the Person page, refer to Searching for Persons job aid.

2. The Notes page displays. Click **New**.



3. The New Note pop-up appears. Enter and Select applicable information then Click **Save**.

Note: Text must be entered when creating a note either in the summary or comment section or both.

New Note



Time Remaining: 29:47

* required field

Subject

Priority Sensitivity

Font Size

4. The Notes page displays the newly created note.

Jane Doe 201558899

Home All Documents Evidence Care and Protection Program Integrity Issues and Proceedings Financial Transactions Referrals **Client Contact** Administration Applications Compliance Time Limits Emplo...

Notes

From Date To Date

Subject	Last Update	Entered By	Date	Priority	Status
Testing	Testing only	NCFast USER88732	3/12/2020 15:40	Medium	Canceled
Testing	A new address given 03/11/2020	NCFast USER88732	3/12/2020 15:37	Medium	Active