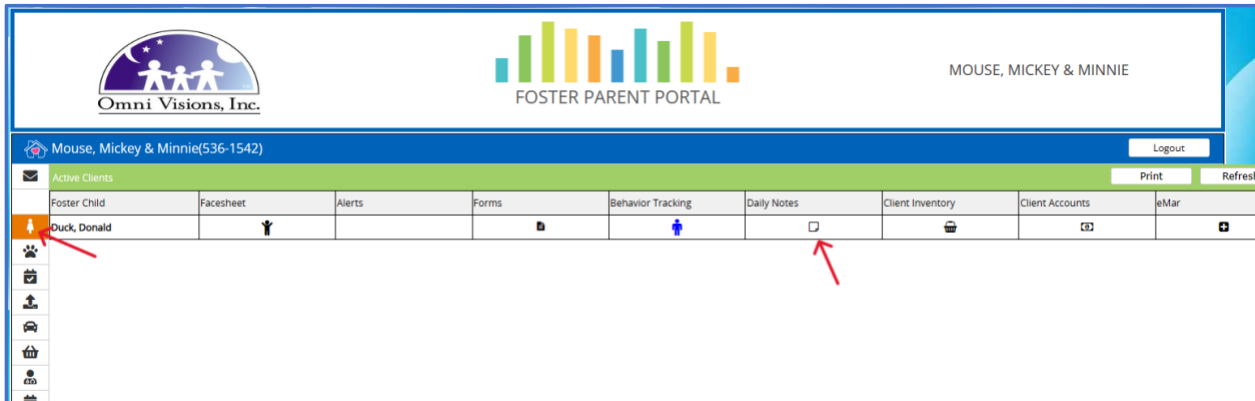
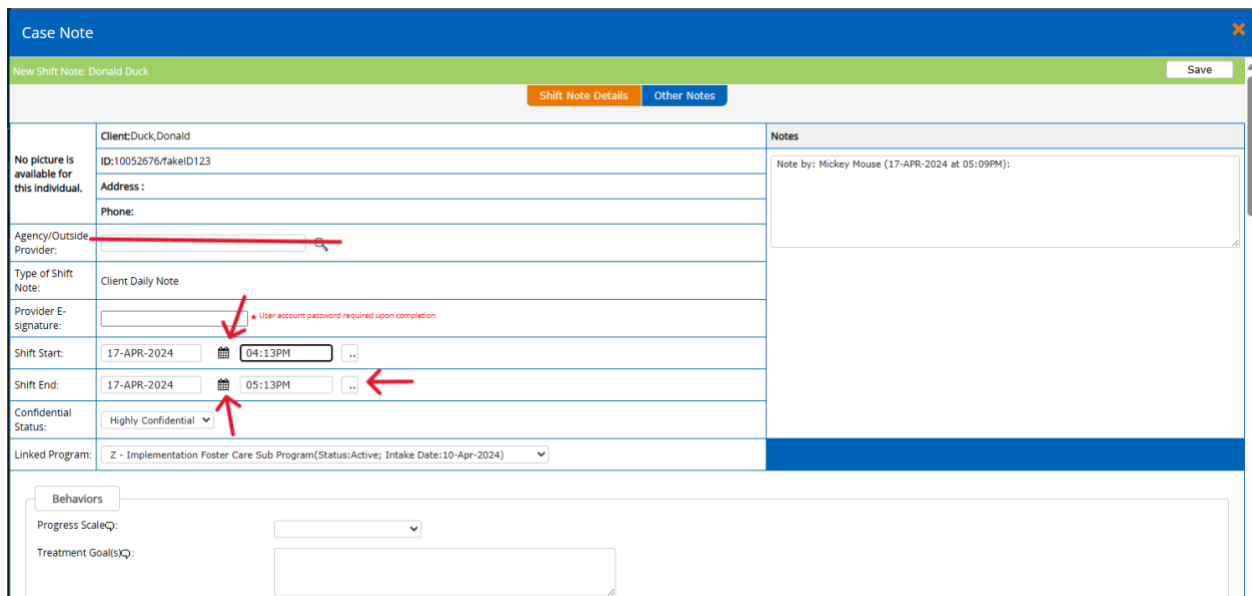


# Entering a Client Note

After logging in, you should start on the **Foster Kids** tab. That's the stick person icon in the menu on the left. Here, you should see listed all the kids placed in your home. Click the post-it note icon under **Daily Notes**.



Your kids name should appear here next to 'Client:'. You don't need to enter anything for 'Agency/Outside Provider'. Don't enter a 'Provider E-signature' until the rest of the note has been completed and saved. Enter a start and end date by clicking the calendars and choosing your date. Enter a start and end time as well. By clicking the ellipses to the right of the time boxes, it will automatically enter the current time and date. **Note: Date and Time formats are strictly enforced. Date formats that are accepted are DD-MON-YYYY, MM/DD/YYYY, MMDDYYYY, & MMDDYY. The only Time format accepted is HH:MMAM or PM. Spaces will not be accepted and the : will autofill if the HH has been entered correctly.**



Fill out the **Progress Scale** and enter **Treatment Goals**. **Interventions Used Today** are checkboxes, check all that apply.

The screenshot shows a 'Case Note' form with two main sections. The 'Behaviors' section includes a 'Progress Scale' dropdown menu set to 'Some Progress' and a 'Treatment Goals' text input field. The 'Interventions Used Today' section contains a list of intervention categories, each with a checkbox. The following table represents the data shown in the 'Interventions Used Today' section:

Intervention Category	Checked
Building a Therapeutic Relationship:	X
Daily Check-Ins:	
Teachable Moments:	
Praise:	
Tracking Behavior:	
Effective Instructions:	
House Rules:	
Awareness of Buttons:	
Behavior Contracts:	X
Do Overs:	
Use of Logical Consequences:	X
Use of Natural Consequences:	
Use of Strategies to Interrupt Conflict Cycle:	

**Delivery of Service** are also checkboxes, check all that apply.

The screenshot shows a 'Case Note' form with a 'Delivery of Service' section. This section contains a list of service categories, each with a checkbox. The following table represents the data shown in the 'Delivery of Service' section:

Service Category	Checked
Behavior Specialist:	X
Court:	
Crisis Intervention:	
DCS Contact:	
Doctor Visit:	
Family Contact:	
Home Visit:	
Mentor:	
No Activities/Contacts Today:	
PPS:	
RC Contact:	X
Respite:	
School Contact:	
Staffing/CFM:	
Therapy:	
Tutor:	
Report on Activities:	

Once your note has been completed, scroll back to the top and click **Save**. Once it's been saved at least once, enter your password in the box labeled **Provider E-Signature**, and click **Save** again.

The screenshot shows the 'Case Note' form for 'Donald Duck'. The form is divided into several sections:
 

- Client Information:** Client: Duck, Donald; ID: 10052676/fakeID123; Address and Phone fields are empty.
- Program:** Z - Implementation Foster Care Sub Program (Intake: 10-Apr-2024; Discharge Date: Still Active)
- Shift Note:** Author: Mickey Mouse
- Agency/Outside Provider:** Searchable field.
- Type of Shift Note:** Client Daily Note (indicated by a red arrow).
- Provider E-Signature:** A text input field with a red asterisk and the text 'User account password required upon completion' (indicated by a red arrow).
- Shift Start/End:** 17-APR-2024, 04:13pm to 05:13pm.
- Confidential Status:** Highly Confidential.
- Linked Program:** Z - Implementation Foster Care Sub Program (Status: Active; Intake Date: 10-Apr-2024).
- Behaviors:** Progress Scale: Some Progress.
- Notes:** A text area containing 'Note by: Mickey Mouse (17-APR-2024 at 05:09PM)'. A red arrow points to the 'Save' button in the top right corner.

You should then be taken to the second tab, **Signatures**. You'll see listed under **Signatures Collected**, the date and time and your name as a saved signature. If you need to add another signature from another user, you can choose the 'Other Welligent User?' radio button, type in the other user's username and password, then click E-Sign. You'll then see both signatures listed under **Signatures Collected**.

The screenshot shows the 'Signatures' tab of the 'Case Note' form. It includes:
 

- Buttons:** Print Note, Print Monthly Goal Grid, Share.
- Signature Form:**
  - Signature Type:** E-Signature (selected), Mouse Signature.
  - Logged in As:** Signee? (selected), Other Welligent User?.
  - Signature Title:** A dropdown menu (indicated by a red arrow).
  - User Account:** mickeymouse.
  - Password:** A text input field with a red asterisk (indicated by a red arrow).
  - Notes:** A text area.
  - Buttons:** Verify/Sign, E-Sign (indicated by a red arrow).
- Signatures Collected Table:**

Title	Date	Signed By	Delete?
Notes: autosigned	April 17, 2024 05:15PM	Mickey Mouse (E)	[Trash icon]

If you need to add the signature of someone who doesn't have a username and password, you can choose the 'Mouse Signature' radio button, choose a signature title or remove the signature title, enter the name of the person, and use your finger or stylus to physically sign the box on the right under 'Signature'. Click 'Save Signature' and you should see the new signature details appear under 'Signatures Collected'.

The screenshot shows a 'Case Note' interface with a blue header and a green footer. The main content area is titled 'Add Digital Signatures' and contains a form with two main sections: 'Signature Type' and 'Signature'. The 'Signature Type' section has two radio buttons: 'E-Signature' and 'Mouse Signature'. The 'Signature' section has a large empty box for the signature. Below the form is a 'Signatures Collected' table with columns for Title, Date, Signed By, and Delete?.

Title	Date	Signed By	Delete?
Notes: autosigned	April 17, 2024 05:15PM	Mickey Mouse (E)	🗑️