

# How to Add and Print a Client Document

CLIENT: (#30)

### Client View

General Data: (edit)

First Name:	Devaprasad	Social Security:	
Last Name:	Kantharaj	Birthdate:	
Address Line 1:	20 Blissville Road	Case Managed:	active
Address Line 2:	3rd Floor	Case Manager:	L. Carena
Town:	Norwich	Intake Date:	September 5, 2001
Phone Number:	(860) 899-1364		

Assessment: (assessments)

Assessment Date:	April 23, 2008	Score:	7.00
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Note: (edit)

Client cannot climb stairs, make appts. for first floor.

client view  
client services  
client case notes  
client goals  
client documents  
household view  
client directory

Click here to get to the 'client documents' screen

CLIENT: Devaprasad Kantharaj (#30)

### Client Documents

Documents... (add)

Date	Staff	Document
02/02/2007	JM	Client Case Management Participation Agreement

client view  
client services  
client case notes  
client goals  
client documents  
household view  
client directory

Click here to begin the process of adding a document

CLIENT: Devaprasad Kantharaj (#30)

### Add Document

Document: Client Application Form with Confidentiality Statement  
Client Case Management Agreement  
Client Case Management Participation Agreement  
Client Confidentiality Statement

Entered: 05/16/2008

Notes:

save cancel

Click on the document you want to add from the list of available agency documents

Change the date if necessary (defaults to current date)

Click here to save the document...



## How to Add and Print a Client Document (continued)

The screenshot shows the 'Client Documents' interface. At the top, it says 'CLIENT: Devaprasad Kantharaj (#30)'. Below that is a table with columns 'Date', 'Staff', and 'Document'. The table contains two rows of data. A red box on the right contains the text 'Document was successfully added for the client'. A red box on the left contains the text 'Click here to access the document' with a red arrow pointing to the 'Client Application Form with Confidentiality Statement' document.

Date	Staff	Document
02/02/2007	JM	Client Case Management Participation Agreement
05/16/2008	DK	Client Application Form with Confidentiality Statement

Document was successfully added for the client

Click here to access the document

The screenshot shows the 'Edit Document Info' interface. It displays the document name 'Client Application Form with Confidentiality Statement' and the date '05/16/2008'. There is a 'Notes' field containing the text: 'Filed signed document in client folder. Made a copy of the signed document and gave to client.' Below the notes field are buttons for 'print', 'save', 'cancel', and 'delete'. A red box on the right contains the text 'Optionally enter a note here' with a red arrow pointing to the notes field. A red box on the left contains the text 'Click here to print a copy of the document' with a red arrow pointing to the 'print' button. A red box on the bottom right contains the text 'Click here to save the note you entered and/or any changes you made to the note or date' with a red arrow pointing to the 'save' button.

Optionally enter a note here

Click here to print a copy of the document

Click here to save the note you entered and/or any changes you made to the note or date