Montgomery County Department of Health and Human Services

Quick Guide to
Weekly Motel Update Case Notes

This worksheet presents step-by-step instructions for creating a Motel Update goal in ServicePoint 5, and entering Weekly Update notes under the goal.

Step One: Enter the Client Profile

In **ClientPoint**, search for the client for whom you want to create the **Motel Update**.

Enter the **Client Profile**.

Step Two: Go to the Case Plans Tab
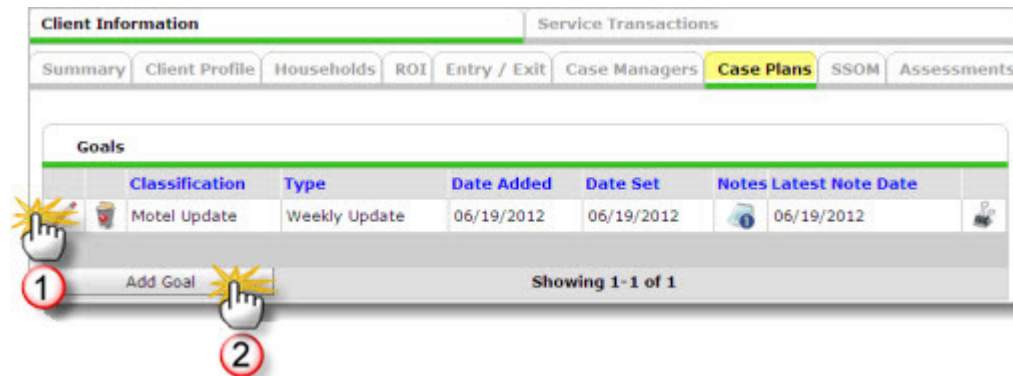
① If there **is** already a **Motel Update** goal, click the **pencil**.

► Go to **Step Four: Add Weekly Update Case Note**, below.

② If there **is not** already a **Motel Update** goal, click the **Add Goal** button.

► Go to **Step Three: Add Motel Update Goal**, below.

Step Three: Add Motel Update Goal

The **Motel Update** is a simple goal. You only need to complete the mandatory items shown in **bold** on the goal.

① Only include the **Head of Household** in the Motel Update goal.

② Select **Motel Update** from the Classification drop-down.

③ Select **Weekly Update** from the Type drop-down.

④ Select **In Progress** as the Overall Status of the goal.

⑤ Click the **Add Goal** button at the bottom of the screen.

Additional sections will appear at the bottom of the goal (see next page).

> **NOTE**: You only need to add the **Motel Update** goal once. You will add all future **Weekly Updates** under the same goal!

Step Four: Add Weekly Update Case Note

In the **Case Notes** section, click the **Add Case Note** button.

Enter the **Case Note**. When you are satisfied with the Case Note, click the **Save Case Note** button.

NOTE

Please enter and edit your case notes carefully.

Once you click the **Save Case Note** button, the Case Note becomes a permanent legal record that cannot be edited or deleted!