


Completing a CLS Note (Non EVV) in OnTarget Desktop



Learn how to efficiently navigate the OnTarget portal to document clinical sessions. This guide walks you through setting appointment times, filling out mandatory fields, and saving your progress for streamlined record keeping.

- 1 Navigate to <https://ontargetclinical.com/login.jsp#>

A screenshot of the OnTarget login interface. It features the OnTarget logo at the top right and a "Welcome back!" message. Below the message, there are two input fields: "Username" with the text "care.giver" and "Password" with masked characters. A "Forgot Password?" link is located below the password field. A green "Log in" button is positioned at the bottom right of the login area.

2 Click "Login"





Welcome back!

Enter your credentials to access your account.

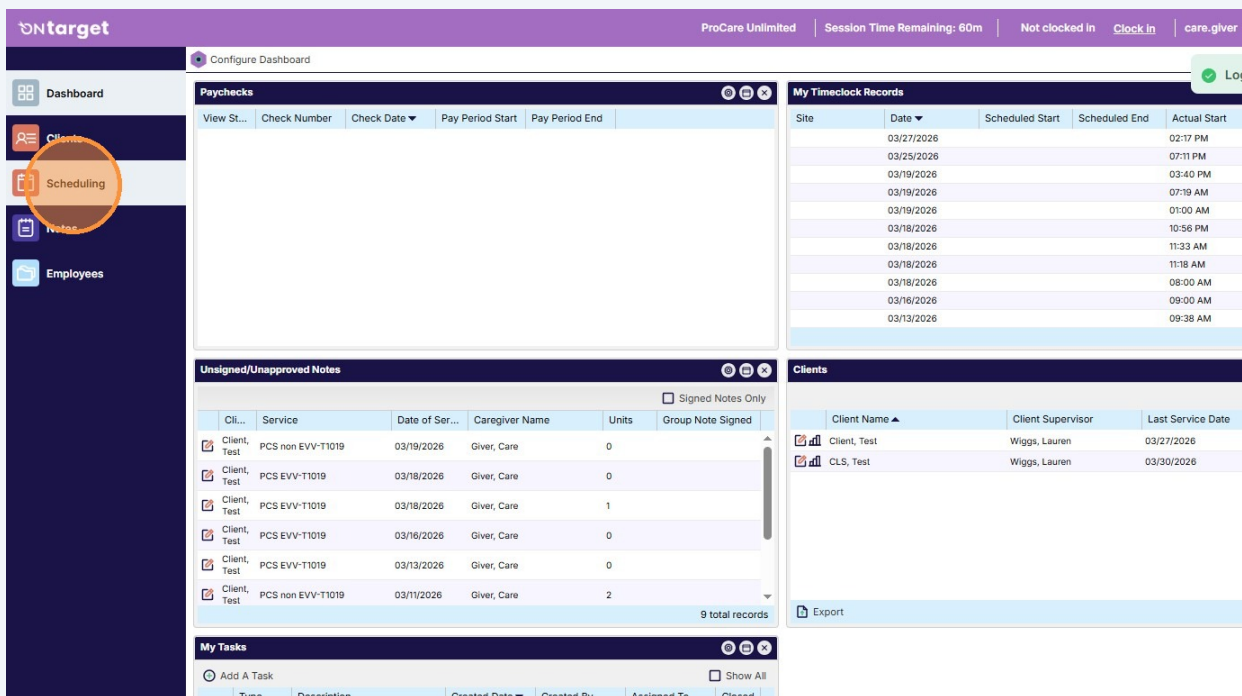
Username:

Password:

[Forgot Password?](#)

[Log in](#)

3 Click "Scheduling"



ONTARGET ProCare Unlimited | Session Time Remaining: 60m | Not clocked in | [Clock in](#) | care.giver

Dashboard | **Scheduling** | Notes | Employees

Paychecks

View St...	Check Number	Check Date	Pay Period Start	Pay Period End
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My Timeclock Records

Site	Date	Scheduled Start	Scheduled End	Actual Start
	03/27/2026			02:17 PM
	03/25/2026			07:11 PM
	03/19/2026			03:40 PM
	03/19/2026			07:19 AM
	03/19/2026			01:00 AM
	03/18/2026			10:56 PM
	03/18/2026			11:33 AM
	03/18/2026			11:18 AM
	03/18/2026			08:00 AM
	03/16/2026			09:00 AM
	03/13/2026			09:38 AM

Unsigned/Unapproved Notes

Cli...	Service	Date of Ser...	Caregiver Name	Units	Group Note Signed
<input checked="" type="checkbox"/>	Client, Test	PCS non EVV-T1019	03/19/2026	Giver, Care	0
<input checked="" type="checkbox"/>	Client, Test	PCS EVV-T1019	03/18/2026	Giver, Care	0
<input checked="" type="checkbox"/>	Client, Test	PCS EVV-T1019	03/18/2026	Giver, Care	1
<input checked="" type="checkbox"/>	Client, Test	PCS EVV-T1019	03/18/2026	Giver, Care	0
<input checked="" type="checkbox"/>	Client, Test	PCS non EVV-T1019	03/13/2026	Giver, Care	0
<input checked="" type="checkbox"/>	Client, Test	PCS non EVV-T1019	03/11/2026	Giver, Care	2

9 total records

My Tasks

Add A Task Show All

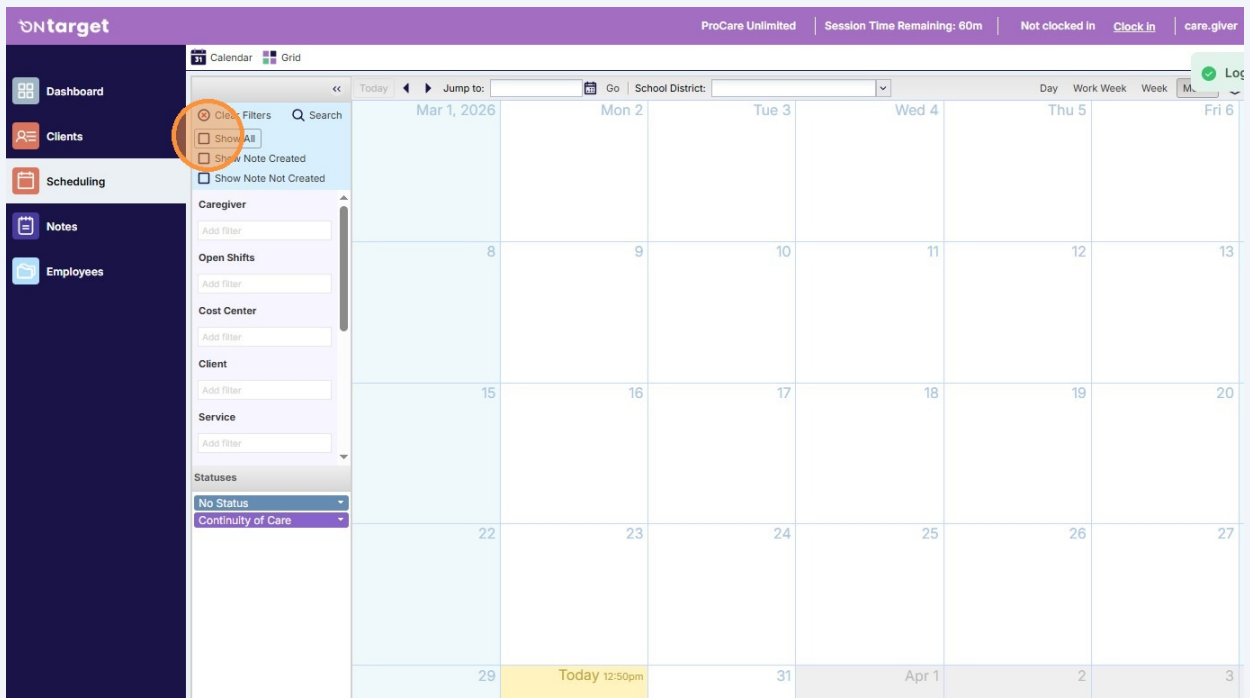
Type	Description	Created Date	Created By	Assigned To	Closed
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Clients

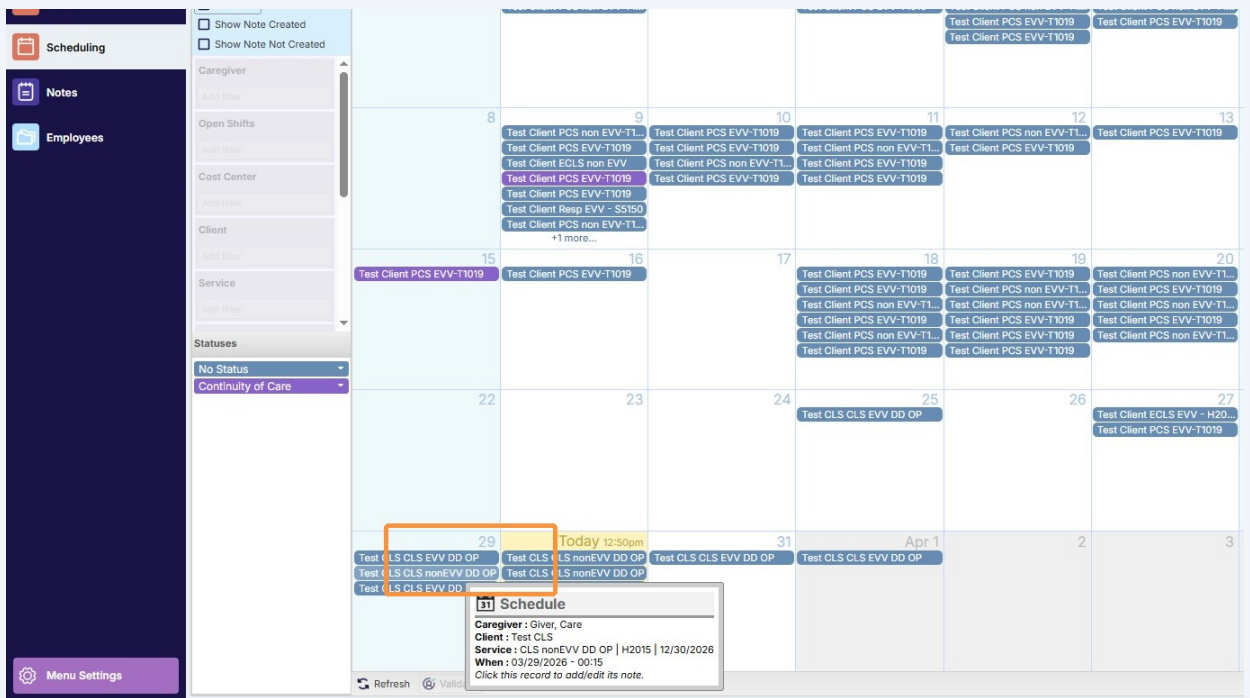
Client Name	Client Supervisor	Last Service Date
<input checked="" type="checkbox"/> Client, Test	Wiggs, Lauren	03/27/2026
<input checked="" type="checkbox"/> CLS, Test	Wiggs, Lauren	03/30/2026

[Export](#)

4 Click "Show all"



5 Click on the shift you want to complete.



6 Enter your Start Time (Ensure AM and PM are noted)

The screenshot shows the 'New Note' form in a scheduling application. The 'Start Time' field is highlighted with an orange circle and contains the text 'e.g.: 08:00 AM'. The form includes fields for Client, Service Date, Service, Client Record Number, Insurance ID, Date of Birth, Template, End Time, and Duration. A workflow diagram on the right shows steps: Work In Process (WIP), Signed, Approved, Billed, and Adjust. A 'Service Unit Utilization' chart shows a bar for 'Remaining' units.

7 Enter in the End Time of your Shift (Make sure to note AM or PM)

The screenshot shows the 'New Note' form in a scheduling application. The 'End Time' field is highlighted with an orange box and contains the text 'e.g.: 08:00 AM'. The form includes fields for Client, Service Date, Service, Client Record Number, Insurance ID, Date of Birth, Template, Start Time, and Duration. A workflow diagram on the right shows steps: Work In Process (WIP), Signed, Approved, Billed, and Adjust. A 'Service Unit Utilization' chart shows a bar for 'Remaining' units.

8 Click "Create Note"

The screenshot shows the 'New Note' form with the following fields:

- Note Information:** Note ID, Title, Status, Date, Time, Location, Category, Priority, Assign To, Assign From, Assign To Role, Assign From Role, Assign To Department, Assign From Department, Assign To Location, Assign From Location, Assign To Category, Assign From Category, Assign To Priority, Assign From Priority, Assign To Status, Assign From Status.
- Client:** CLS, Test
- Service Date:** 03/29/2026
- Service:** CLS nonEvv DD OP | H2015 | 12/30/2026
- Client Record Number:** 2343
- Insurance ID #:** 12345641
- Date of Birth:** 02/01/2026
- Template:** CLS
- Start Time:** 08:00 AM
- End Time:** 8:15am
- Duration:** 12:03
- Schedule:** CLS nonEvv DD OP 00:15
- Caregiver:** Giver, Care
- Supervisor:** Wiggs, Lauren

The 'Create Note' button is highlighted with an orange circle. A flowchart on the right shows the process flow: Work in Process (WIP) -> Signed -> Approved -> Billed. A bar chart below shows 'Service Unit Utilization' with categories: Remaining (green), Billed (blue), and In Process (red).

9 Scroll down to the goals, complete the Intervention and the Assessment for each goal by entering an "x" under the appropriate intervention type and then the appropriate assessment as well. See Below:

The screenshot shows the 'New Note' form with the following fields:

- Client:** CLS, Test
- Service Date:** 03/29/2026
- Service:** CLS nonEvv DD OP | H2015 | 12/30/2026
- Client Record Number:** 2343
- Insurance ID #:** 12345641
- Date of Birth:** 02/01/2026
- Template:** CLS
- Start Time:** 08:00 AM
- End Time:** 08:15 AM
- Duration:** 00:15
- Schedule:** CLS nonEvv DD OP 00:15
- Caregiver:** Giver, Care
- Supervisor:** Wiggs, Lauren

The 'Goals' section is visible, with the following table structure:

Outcomes	Intervention								Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	N/A	
GOAL ID: 01 01 CLS staff will help teach Test money management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.													
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.													
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice													

The 'Intervention' column has 'IND' and 'VP' entered. The 'Assessment' column has 'X' entered. A tooltip shows 'Allowed keys: X'.

10 Click here.

Client: CLS, Test

Service Date: 03/29/2026

Service: CLS nonEvv DD OP | H2015 | 12/30/2026

Client Record Number: 2343

Insurance ID #: 12345641

Date of Birth: 02/01/2026

Template: CLS

Start Time: 08:00 AM

End Time: 08:15 AM

Duration: 00:15

Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	
GOAL ID: 01 01 CLS staff will help teach Test money management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x											
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.												
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice												

Member/Guardian Signature: Draw signature | Choose signature

Schedule: CLS nonEvv DD OP 00:15

Caregiver: Giver, Care

Supervisor: Wiggs, Lauren

(WIP) Amend

Signed Unapprove

Approved Adjust

Billed

Not Approved for Payroll

Service Unit Utilization

Total Units

This Service

11 Click here.

Client: CLS, Test

Service Date: 03/29/2026

Service: CLS nonEvv DD OP | H2015 | 12/30/2026

Client Record Number: 2343

Insurance ID #: 12345641

Date of Birth: 02/01/2026

Template: CLS

Start Time: 08:00 AM

End Time: 08:15 AM

Duration: 00:15

Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	
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Member/Guardian Signature: Draw signature | Choose signature

Schedule: CLS nonEvv DD OP 00:15

Caregiver: Giver, Care

Supervisor: Wiggs, Lauren

Not

Service Ur

Total

This S

12 Click here.

Client: CLS, Test
 Service Date: 03/29/2026
 Service: CLS nonEUV DD OP | H2015 | 12/30/2026
 Client Record Number: 2343
 Insurance ID #: 12345641
 Date of Birth: 02/01/2026
 Template: CLS
 Start Time: 08:00 AM
 End Time: 08:15 AM
 Duration: 00:15

Schedule: CLS nonEUV DD OP 00:15
 Caregiver: Giver, Care
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Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
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GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.												

Member/Guardian Signature: Draw signature | Choose signature

Not Approved for Payroll

Service Unit Utilization

Total: 1 Units

Legend: Remaining (Green), Billed (Blue), In Process (Red)

This Service: 1 In Process

13 Click here.

Scheduling

Notes

Employees

Client: CLS, Test
 Service Date: 03/29/2026
 Service: CLS nonEUV DD OP | H2015 | 12/30/2026
 Client Record Number: 2343
 Insurance ID #: 12345641
 Date of Birth: 02/01/2026
 Template: CLS
 Start Time: 08:00 AM
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 Duration: 00:15

Schedule: CLS nonEUV DD OP 00:15
 Caregiver: Giver, Care
 Supervisor: Wiggs, Lauren

Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	
management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x									x		
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.		x										
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Member/Guardian Signature: Draw signature | Choose signature

Not

Service Ur

Total: 1

This S

14 Click here.

Client: CLS, Test
 Service Date: 03/29/2026
 Service: CLS nonEUV DD OP | H2015 | 12/30/2026
 Client Record Number: 2343
 Insurance ID #: 12345641
 Date of Birth: 02/01/2026
 Template: CLS
 Start Time: 08:00 AM
 End Time: 08:15 AM
 Duration: 00:15

Schedule: CLS nonEUV DD OP 00:15
 Caregiver: Giver, Care
 Supervisor: Wiggs, Lauren

Override Automatic Assessment Values

Outcomes
 management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.

GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.

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Member/Guardian Signature: Draw signature | Choose signature

Not Approved for Payroll

Service Unit Utilization

Total: 1 Units

Legend: Remaining (green), Billed (blue), In Process (red)

This Service: 1 In Process

Outcomes	Intervention							Assessment			Comment	
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP		DEC
management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x									x		
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.		x							x			
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.				x								

15 The client/Guardian will need to sign here. They can either Draw the Signature or simply type in their name by choosing "choose signature"

Insurance ID #: 12345641
 Date of Birth: 02/01/2026
 Template: CLS
 Start Time: 08:00 AM
 End Time: 08:15 AM
 Duration: 00:15

Override Automatic Assessment Values

Outcomes
 management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.

GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.

GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.

Member/Guardian Signature: Draw signature | Choose signature

Service Unit Utilization

Total: 1 Units

This Service: 1 In Process

Outcomes	Intervention							Assessment			Comment	
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP		DEC
management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x									x		
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.		x							x			
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.				x								

16 They will type in their name below

Scheduling

Notes

Employees

Menu Settings

Insurance ID # 12345641

Date of Birth 02/01/2026

Template: CLS

Start Time: 08:00 AM

End Time: 08:15 AM

Duration: 00:15

Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	
management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x									x		
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.		x							x			
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.				x							x	

Member/Guardian Signature: Draw signature | Choose signature

Type name here...

Sign Note Save

17 Click "Save"

Scheduling

Notes

Employees

Menu Settings

Insurance ID # 12345641

Date of Birth 02/01/2026

Template: CLS

Start Time: 08:00 AM

End Time: 08:15 AM

Duration: 00:15

Override Automatic Assessment Values

Outcomes	Intervention							Assessment				Comment
	IND	VP	G	M	PP	HOH	R	N/A	SAM	IMP	DEC	
management skills, such as making transactions with a debit card and obtaining proper change when making cash transactions.	x									x		
GOAL ID: 01 02 CLS staff will assist Test with her laundry tasks. Staff will prompt Test to bring down dirty laundry to the laundry room, move laundry from washer to dryer, sort and put the laundry away.		x							x			
GOAL ID: 01 03 CLS staff will assist Test on meal preparation and kitchen skills. Staff assist Test with remembering and using the stove safely. Staff will guide Test to follow all steps when cooking, read labels, store food properly, practice kitchen safety and make healthy choices.				x							x	

Member/Guardian Signature: Draw signature | Choose signature

Member Signatur

Member Signatur

Member Signatur

Member Signatur

Sign Note Save

(WIP) Amend

Signed Unapprove

Approved Adjust

Billed

Not Approved for Payroll

Service Unit Utilization

Total Units

This Service

Remaining Billed In Process

18 Click "yes" to sign your note.

The screenshot shows a software interface with a sidebar on the left containing 'Clients', 'Scheduling', 'Notes', and 'Employees'. The main area displays a form with fields for 'Insurance ID #', 'Date of Birth', 'Template', 'Start Time', 'End Time', and 'Duration'. A 'Confirm' dialog box is centered on the screen, asking 'All goals have been addressed, would you like to complete the note by signing?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in orange. In the top right corner, a green notification box says 'Success: Note Successfully'. Below the dialog, there is a table with columns 'IND', 'VP', 'G', 'Assessment', 'MP', 'DEC', 'N/A', and 'Comment'. The 'Assessment' column contains 'x' marks. At the bottom, there is a 'Member/Guardian Signature' field with a 'Draw signature' option and a signature area containing the text 'Member Signatur'.

19 Type in your password to get into OnTarget (this is your signature), click "ok".

The screenshot shows the same software interface as in step 18. A 'Digital Signature required' dialog box is centered on the screen, asking 'I ATTEST that I am the staff member specified in this document and that it is my intent to place my electronically binding signature onto this document.' with a password field and 'Cancel' and 'OK' buttons. The 'OK' button is circled in orange. The 'Member/Guardian Signature' field now contains a handwritten signature 'Member Signatur'. In the top right corner, a flowchart shows 'Unapprove', 'Approved', 'Adjust', and 'Billed' buttons. Below the flowchart, a 'Service Unit Utilization' chart shows a bar for 'This Service' with a value of 1. The chart has a legend with 'Remaining' (green), 'Billed' (blue), and 'In Process' (red).