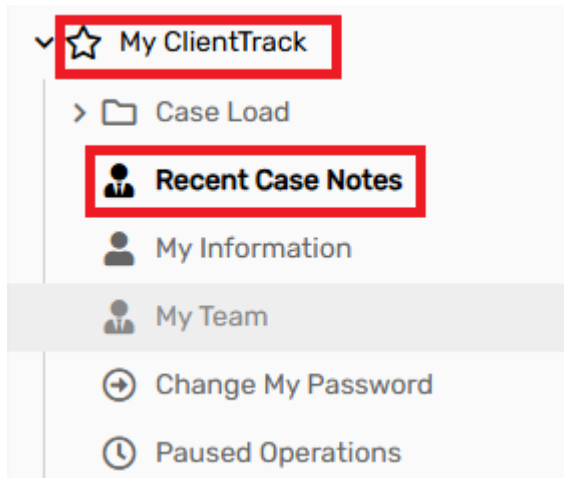


How to Guide: Recent Case Notes Tool

1. From the home workspace select “My ClientTrack” and then “Recent Case Notes”



2. Then select the earliest creation date for the case notes that you would like to review

A screenshot of a search interface. At the top, it says 'Displays a list of case notes by client created since the date entered below'. Below this is a label 'Case Notes Created Since: *' followed by a date input field containing '01/01/2025' and a calendar icon. The entire input area is highlighted with a red rectangular box. Below the input field is a blue button with a magnifying glass icon and the text 'Search', also highlighted with a red rectangular box.

3. Select the arrow next to the case manager whose case notes you would like to review

Client Name 	Created Date	Entry Date
 TR02 - 1		
 TR03 - 1		
 TR04 - 1		

4. Next expand the case note for the client for additional information

Client Name ↑↓	Created Date	Entry Date
▼ TR02 - 1		
▼ Love, Smurfette		
*** Love, Smurfette	07/22/2025 1:55PM	05/01/2025

In this example we can see when the case manager entered the case note on 7/22/25 (Created Date) and backdated the record to 5/1/25 (Entry Date).

Something to keep in mind is that the ClientTrack system is on central time (CST), so if you are on eastern time (EST) you will need to add an hour to the “Created Date” to know exactly when the record was created.

This tool can be a helpful way to track data entry timeliness by comparing the date the record was created to the date that the case manager selected.

Please email your respective helpdesk at hmishelpdesk@ihcda.in.gov or dvhelpdesk@ihcda.in.gov for further assistance.