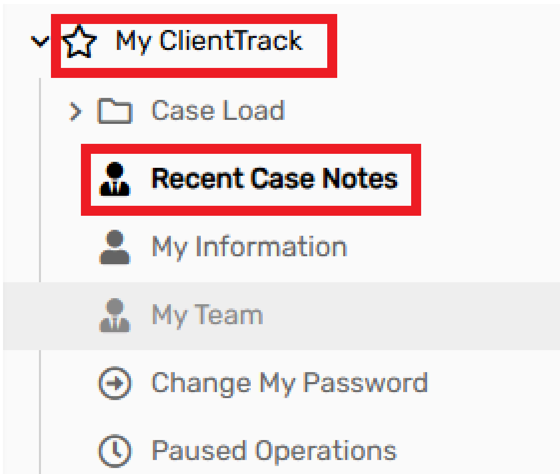
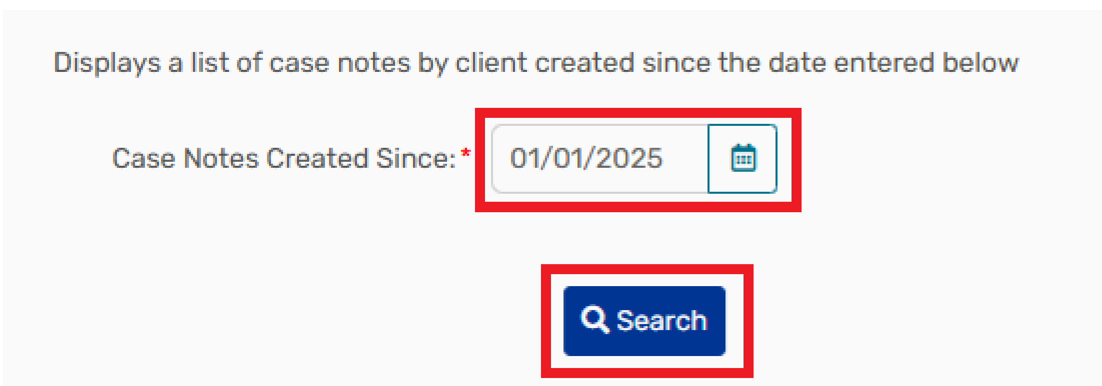
How to Guide: Recent Case Notes Tool

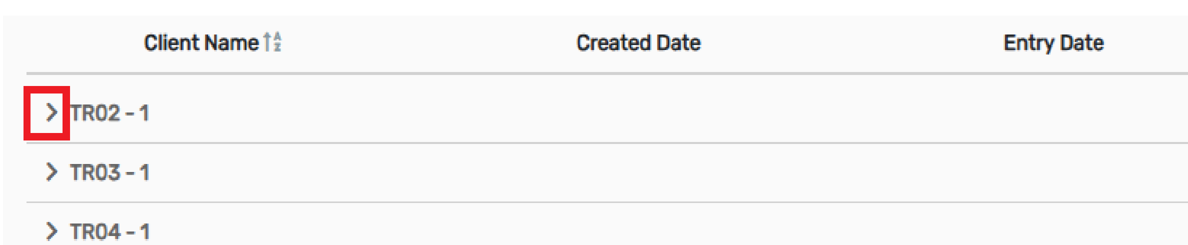
1. From the home workspace select “My ClientTrack” and then “Recent Case Notes”



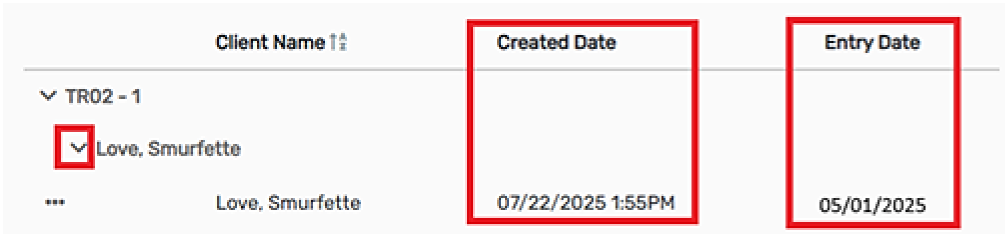
2. Then select the earliest creation date for the case notes that you would like to review



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



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



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.