
Utah Ryan White Part B Program
ClientTrack
Client Case Notes User Guide



UTAH DEPARTMENT OF
HEALTH

Division of Disease Control & Prevention

Bureau of Epidemiology

Ryan White Part B Program

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1. ABOUT THIS USER GUIDE

The purpose of this document is to provide ClientTrack users the information they need to access, read, and write client case notes.

The term “Program” will be used referring to the Utah Ryan White Part B Program.

2. ADMINISTRATION FUNCTION CONTROL

The workgroup UDOH Admin is the only workgroup that has the permissions to control the Client Case Notes functionality. This function is found by following the pathway below.

1. Home workspace
2. Setup Data Management menu group
3. Additional Setup flyout menu
4. Case Note Types by workgroup

3. CASE NOTES

ClientTrack has a central location for all users to add and view notes detailing actions taken and information about the client, eligibility, case management, services, etc. Case notes are set up with each workgroup having different permissions to be able to read and/or write case notes. Therefore, all users may not be able to see all notes.

I. Client Workspace

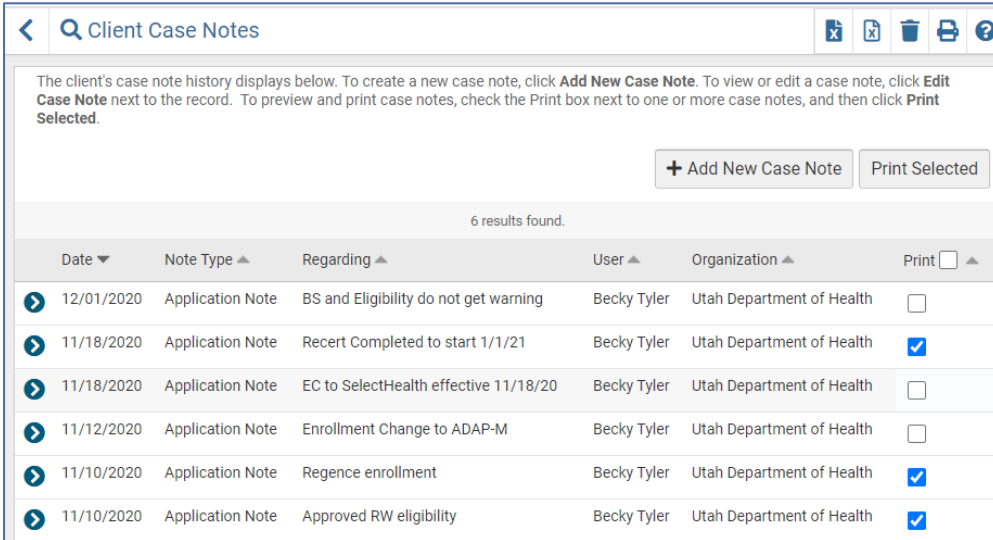
The Case Notes are accessed from the Client Workspace menu options. Click Case Notes to view and add new notes.

A. Case Notes History

Case notes history displays with a brief summary, date, and who entered the notes.

1. **Action Date:** The date the user entered the notes.
2. **Service Date:** The date the service took place.
3. **Note Type:** Depending on the workgroup you are logged in as, allows you to read specific note types.
4. **Regarding:** Subject the note is about.
5. **User:** The user who entered the note.
6. **Organization:** The organization the user is associated with.

7. **Print:** Print box to check then print one or multiple notes at a time.



The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, and then click **Print Selected**.

6 results found.

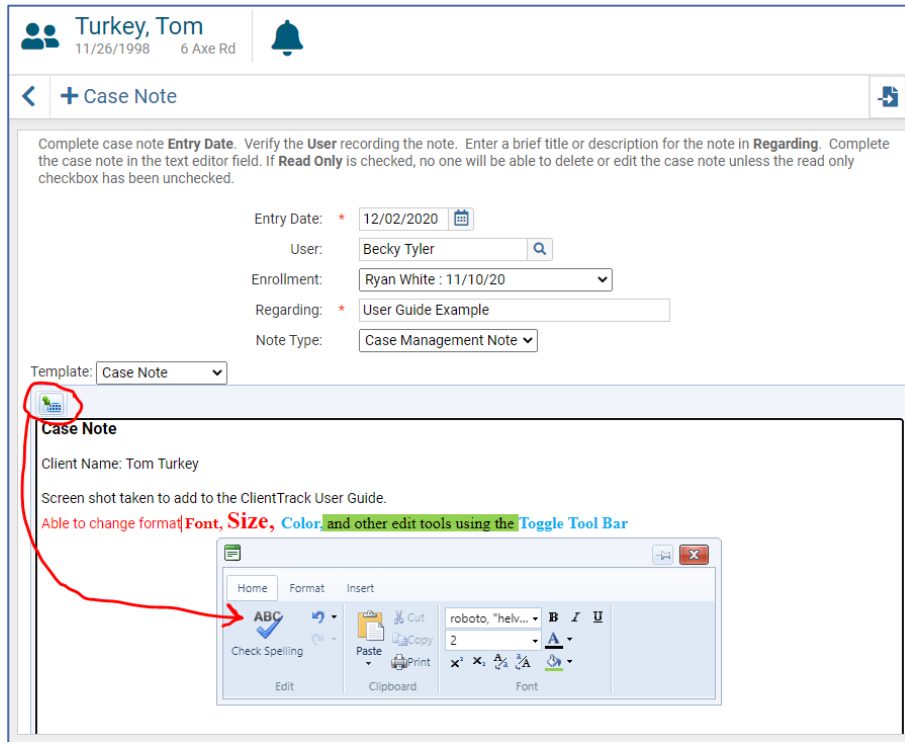
Date ▼	Note Type ▲	Regarding ▲	User ▲	Organization ▲	Print <input type="checkbox"/> ▲
12/01/2020	Application Note	BS and Eligibility do not get warning	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/18/2020	Application Note	Recert Completed to start 1/1/21	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>
11/18/2020	Application Note	EC to SelectHealth effective 11/18/20	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/12/2020	Application Note	Enrollment Change to ADAP-M	Becky Tyler	Utah Department of Health	<input type="checkbox"/>
11/10/2020	Application Note	Regence enrollment	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>
11/10/2020	Application Note	Approved RW eligibility	Becky Tyler	Utah Department of Health	<input checked="" type="checkbox"/>

B. Add Case Note

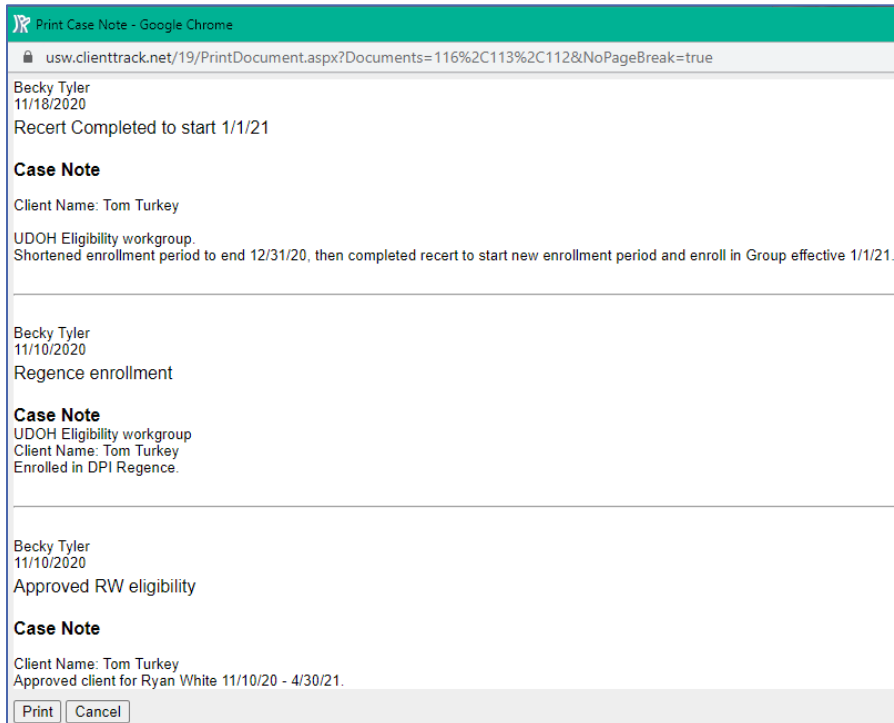
To add new notes, click the **Add New Case Note** button. Complete the boxes for the following:

1. **Service Date:** Auto defaults to today's date.
 - a. If the service was rendered on an earlier date, you may change the date to the date the service was rendered. However, the notes should be completed within 3 days of the service. There is a grace period day, allowing 4 days prior to the current date to allow for a holiday on a weekend.
 - i. Example, current date is 1/13/21, the only allowable dates to be entered in will be 1/9/21 - 1/13/21. If user enters date outside of the date rule, a warning displays: "Service date must be today or within the previous 4 days."
 - b. Future dates are not allowed.
2. **User:** Auto defaults to the user logged in.
3. **Enrollment:** Select from the dropdown box the enrollment the note is about. The program with the first day of eligibility for that program is listed.
4. **Regarding:** Enter the subject for the note you are entering.
5. **Note Type:** Select from dropdown menu the type.
6. **Template:** A template to select from dropdown menu for the type of note entering.
7. **Notes Text Box:** Text box to add notes. The text can be modified, change format, font, size, color, and other edit tools by clicking on the Toggle Floating Tool Bar button in the upper left corner of the text box.





- Print Selected:** Check the note(s) to be previewed. This option opens a new window with the notes that were checked in complete detail all on one page. This way you do not have to open each note separately to view notes history. If you wish to print the notes, click the print button at the bottom of the page.



C. Note Types

There are different note types depending on the action taken and what workgroup you are logged into.

1. **Benefit Specialist Note:** Notes about Benefit Specialists activity. This may include, but not limited to, the action taken on Application, Recertification, and Self-Attestation, missing documentation, exception request, enrollment changes request, updates client reports etc.
2. **Eligibility Note:** Notes about all things regarding eligibility, approval, program enrolled in, client detail affecting eligibility, exception request detail, income calculation explanations for unusual cases, enrollment changes, restriction reason, early disenrollment, restart eligibility period, etc.
3. **Services Note:** Notes about all things regarding Supportive Services (EFA, Food Vouchers, Transportation, Dental, etc.), referrals, decisions, denial reason, missing documentation, client interactions (document client phone calls), etc.
4. **Case Management Note:** Notes about all things Case Manager activity. This may include, but not limited to, client contact, actions taken, referrals, etc.
5. **Note to Client:** Notes for the client to view through the Client Portal. For clients who have set up their online account for the Client Portal will be able to read notes written to them.
 - a. When this Note Type is selected, the warning "Notes to Client are visible to the Client through the Portal!" will be populated.
6. **Finance Note:** Notes about finance activity. This may include, but not limited to, premium payment notes, Premium Repayments, deposits, etc.
7. **Pharmacy Note:** Notes about pharmacy and medication services. This may include, but not limited to, pharmacy interactions, medication override, fill before due date, pre-auth etc.
8. **IDT Note:** Notes about Medical Case Management activity.

D. Workgroup Permissions

The workgroup you are logged in to determines what other workgroups case notes you can read and/or write.

1. **Benefit Specialist Workgroup:** If you are logged in under the Benefit Specialist workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Services notes, and Note to Client.
 - b. **Read Only:** Eligibility notes.
2. **Case Manager Workgroup:** If you are logged in under the Case Manager workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Services notes, Case Management notes, Note to Client, and IDT notes.
 - b. **Read Only:** Eligibility notes.
3. **CM Admin Workgroup:** If you are logged in under the CM Admin workgroup, you have access to:

- a. **Read and Write:** Benefit Specialist notes, Services notes, Case Management notes, Note to Client, and IDT notes.
 - b. **Read Only:** Eligibility notes.
4. **UDOH Admin Workgroup:** If you are logged in under the CM Admin workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Eligibility Notes, Services notes, Case Management Notes, Note to Client, Finance Notes, Pharmacy notes, and IDT notes.
 - b. **Read Only:** None (have read and write access for all workgroups).
5. **UDOH Eligibility Workgroup:** If you are logged in under the UDOH Eligibility workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Eligibility Notes, and Note to Client.
 - b. **Read Only:** None.
6. **UDOH Finance Workgroup:** If you are logged in under the UDOH Finance workgroup, you have access to:
 - a. **Read and Write:** Finance notes.
 - b. **Read Only:** None.
7. **UDOH Power Workgroup:** If you are logged in under the UDOH Power workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Eligibility Notes, Services notes, Case Management Notes, Note to Client, Finance Notes, Pharmacy notes, and IDT notes.
 - b. **Read Only:** None (have read and write for all workgroups).
8. **UDOH Services Workgroup:** If you are logged in under the UDOH Services workgroup, you have access to:
 - a. **Read and Write:** Benefit Specialist notes, Services notes, Note to Client, Finance Notes, and Pharmacy notes.
 - b. **Read Only:** Eligibility Notes.
9. **Pharmacy Workgroup:** : If you are logged in under the Pharmacy workgroup, you have access to:
 - a. **Read and Write:** Pharmacy notes.
 - b. **Read Only:** None