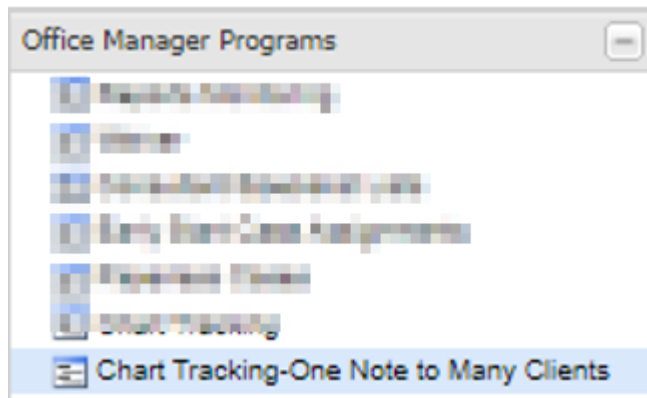




# Chart Tracking-One Note to Many Clients

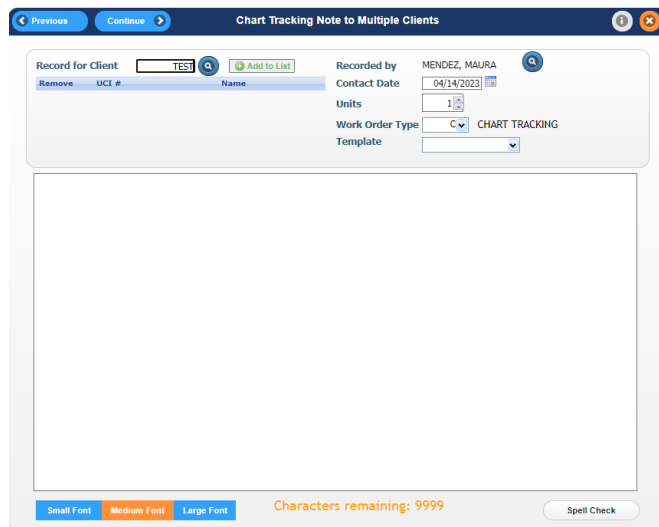
Chart Tracking - One Note to Many Clients is a useful tool for support staff and office managers when they are completing the same process for a number of clients. It provides the ability to enter one note to many clients.

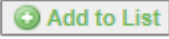
The **Chart Tracking-One Note to Many Clients** can be accessed from the Navigation under the **Office Manager Programs** menu.

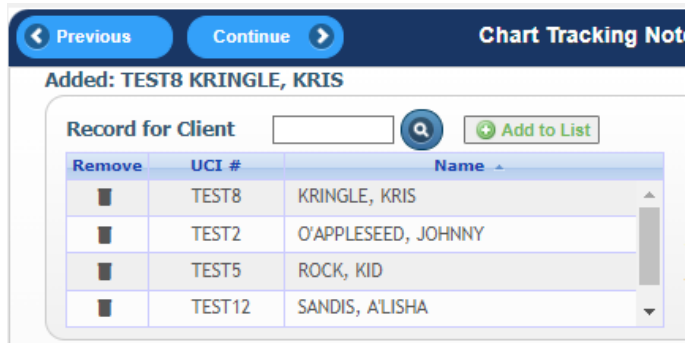


The Chart Tracking Note to Multiple Clients screen will display.


Enter the UCI# or search for a UCI# using  icon. Then click on the  button.



Clicking the  button will add the UCI# to the list of clients where the note record will be created.



Once all records have been added, verify that all records are correct.

The **Filter & Find** feature is available by right clicking on the header of the grid. If needed, records can be removed from the list by clicking on the  button.

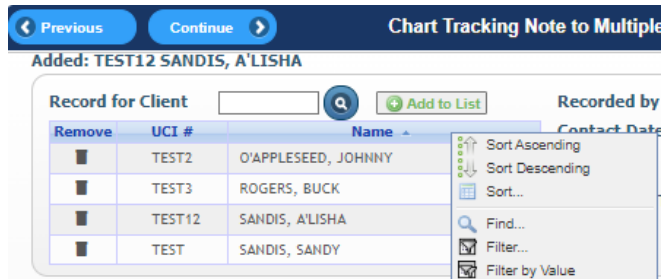
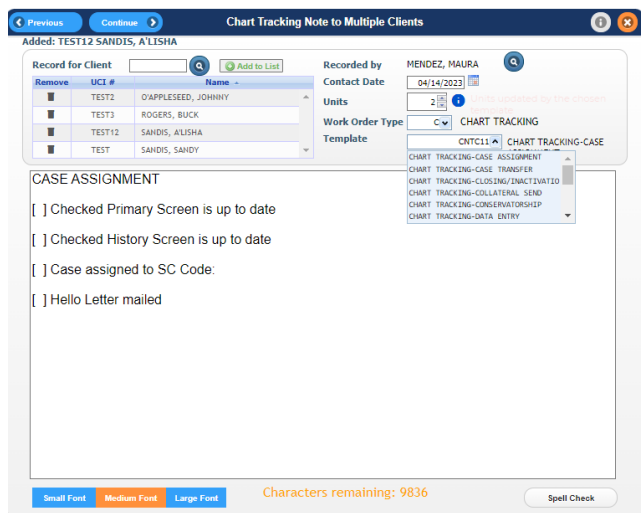


Chart Tracking Notes can be manually entered. A template can also be used, if available, by selecting a template from the dropdown arrow next to the Template field.



If a template is selected, the number of units are automatically updated matching the units associated with the template.

**Note to Multiple Clients**

Recorded by: MENDEZ, MAURA

Contact Date: 04/14/2023

Units: 2

Work Order Type: C

Template: CNTC11 CHART TRACKING-CASE ASSIGNMENT

Units updated by the chosen template

The font size can be changed using the font size buttons:

Small Font Medium Font Large Font

Spell Check is also available to check for misspelled words.

CASE ASSIGNMENT

[ X ] Checked Primary Screen is up to date

[ X ] Checked History Screen is up to date

[ X ] Case assigned to SC Code:

[ X ] Hello Letter mailed

Small Font Medium Font Large Font Characters remaining: 9832 Spell Check

To proceed, click on the Continue button.

Chart Tracking Note to Multiple Clients

Added: TEST12 SANDIS, A'LISHA

Remove	UICE #	Name
	TEST2	O'APPLESEED, JOHNNY
	TEST3	ROGERS, BUCK
	TEST12	SANDIS, A'LISHA
	TEST	SANDIS, SANDY

Recorded by: MENDEZ, MAURA

Contact Date: 04/14/2023

Units: 2

Work Order Type: C CHART TRACKING

Template: CNTC11 CHART TRACKING-CASE ASSIGNMENT

CASE ASSIGNMENT

[ ] Checked Primary Screen is up to date

[ ] Checked History Screen is up to date

[ ] Case assigned to SC Code:

[ ] Hello Letter mailed

Small Font Medium Font Large Font Characters remaining: 9836 Spell Check

The next screen allows for reviewing and editing the notes. If no errors are found, click on the **Import All** button to proceed with adding the chart tracking note to all clients on the screen.

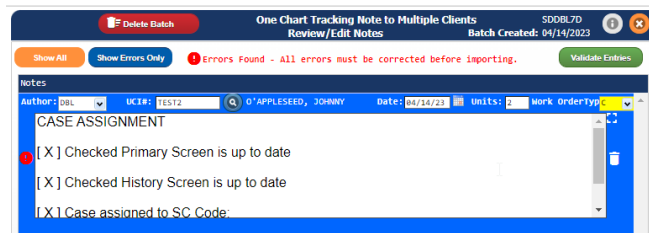
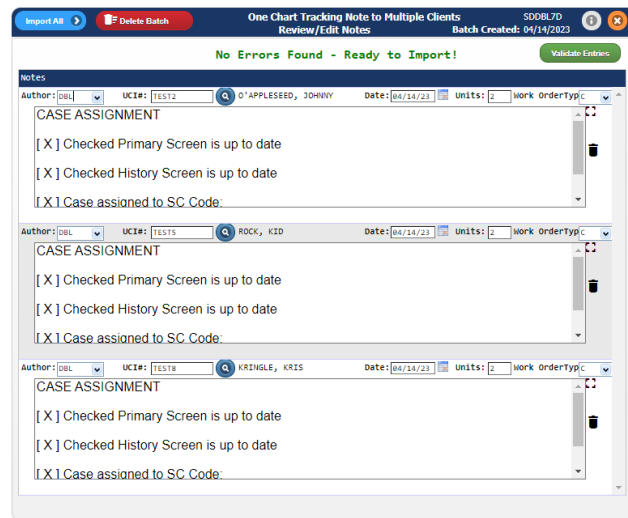
Clicking on the **Delete Batch** will take the user back to the previous screen and no notes will be added.

If errors are found, the system will not allow the importing of the notes until no errors are found. After corrections are made, click on the **Validate Entries** button.

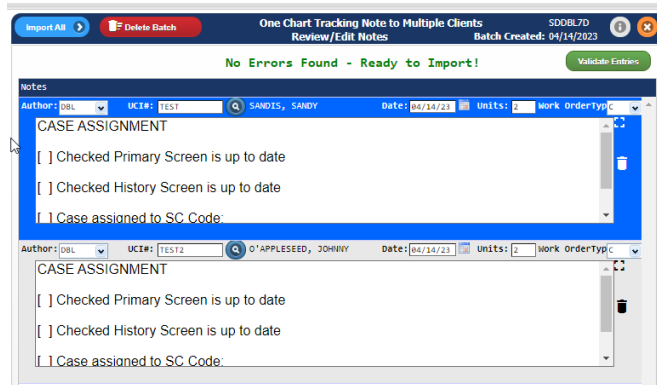
To only show notes with errors, click on **Show Errors Only**.

All notes can be displayed by clicking **Show All**.

Records can also be removed from the batch by clicking on the **Delete** button.



When ready to proceed, click on the **Import All** button.



The notes will display in the Chart Tracking history screen for each of the records included in the batch.

