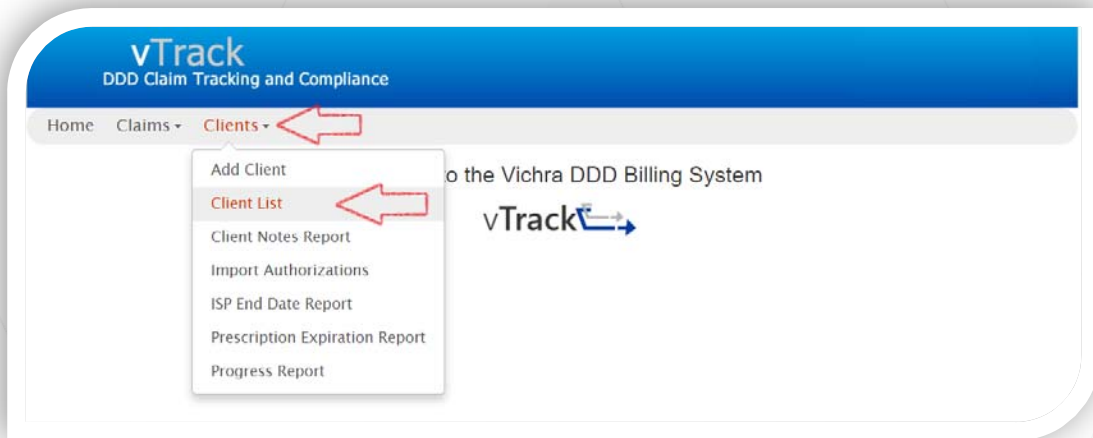
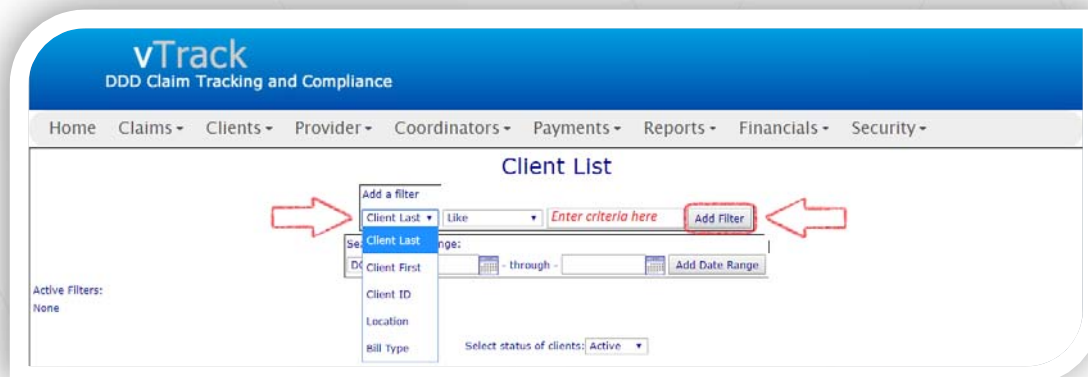


## How to Enter Client Notes

1. **Navigate to the Clients Drop-Down Menu**
  - Select-> Client List



2. **Use Filters to Locate the Client**
  - Select-> Search Criteria from the filter drop-down menu
  - Enter-> Corresponding criteria from your drop-down menu selection
  - Click-> Add Filter



- Click-> Edit to open the client's portal

vTrack  
DDD Claim Tracking and Compliance

Home Claims Clients Provider Coordinators Payments Reports Financials Security

### Client List

Add a filter  
Client Last Like Add Filter

Search by date range:  
DOB - through - Add Date Range

Active Filters:  
Client Last Like "Torrez" Remove

Select status of clients: Active

Total found: 1

<input type="checkbox"/>	View/ Edit	Client Last	Client First	Client ID	DOB	Location	Bill Type
<input type="checkbox"/>	Edit	Torrez	Terri	122222222	01/01/2011	Tucson	TPL + DDD

Delete Selected

V

- Click-> Notes tab

vTrack  
DDD Claim Tracking and Compliance

Home Claims Clients Provider Coordinators Payments Reports Financials Security

Terri Torrez

Client Info Authorizations Insurance Diagnoses Acct Summary Prescriptions Walvers Files Notes Changes

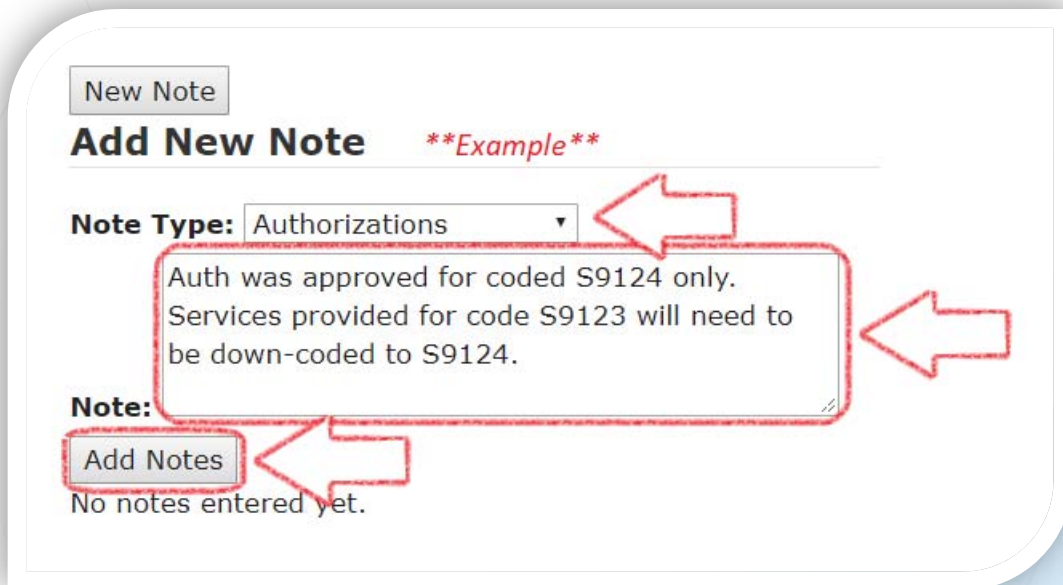


- Click-> New Note



- Select-> Note Type: from the drop-down menu
- Enter-> Note in the Note: box
- Click-> Add Notes

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- Success! The note has been entered

**vTrack**  
DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ Payments ▾ Reports ▾ Financials ▾ Security ▾

Terri Torrez

Client Info Authorizations Insurance Diagnoses Acct Summary Prescriptions Waivers Files Notes Changes

New Note

Date	Note Type	Note	Author
07/12/2019	Authorizations	Auth was approved for coded S9124 only. Services provided for code S9123 will need to be down-coded to S9124.	Example

### 3. Billing Notes

- Notes entered can also be viewed in the Add Claim Screen. This is helpful when hand keying claims

**vTrack**  
DDD Claim Tracking and Compliance

Home Claims ▾ Clients ▾ Provider ▾ Coordinators ▾ Payments ▾ Reports ▾ Financials ▾ Security ▾

**Add Claim**  
Show Last Claim

Client: Torrez Terri  
Service: [dropdown]  
AFC Modifier: [dropdown]  
Start Date: 07 / 12 / 2019 (mm/dd/yyyy)  
End Date: 07 / 12 / 2019 (mm/dd/yyyy)  
Time: [dropdown] --- [dropdown] UF [dropdown]  
Units: [dropdown] Abs Units: 0

Provider: [dropdown]  
Pay and hold?: [checkbox]  
Authorizations: Type: Research [dropdown]  
Primary: [dropdown]  
Secondary: [dropdown]  
Tertiary: [dropdown]  
DDD: [dropdown]  
Other: [dropdown]  
Location: Tucson [dropdown]  
Bill Type: TPL + DDD [dropdown]  
Incontinent?: [checkbox] Nutrition: [checkbox]  
DDD Therapy Code: [dropdown]  
Claim Notes: [text area]

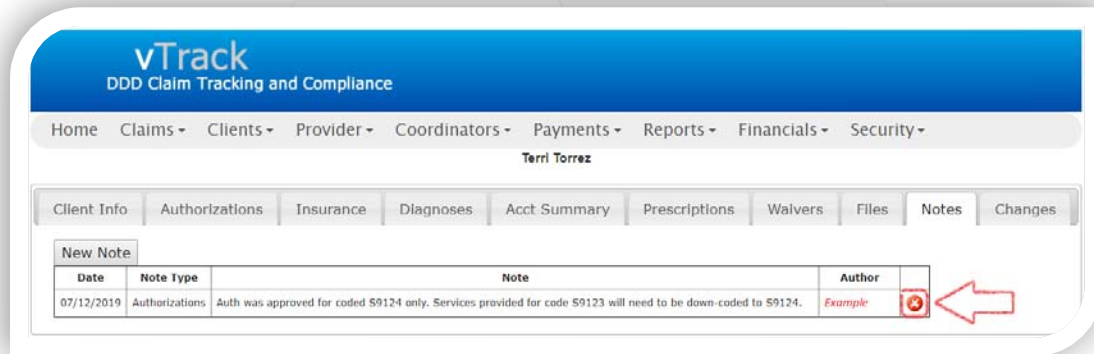
Date	Note Type	Note	Author
07/12/2019	Authorizations	Auth was approved for coded S9124 only. Services provided for code S9123 will need to be down-coded to S9124.	Raelee Vichra

Add Claim to Batch Add Single Claim  
Claims for this Client - Provider - Service

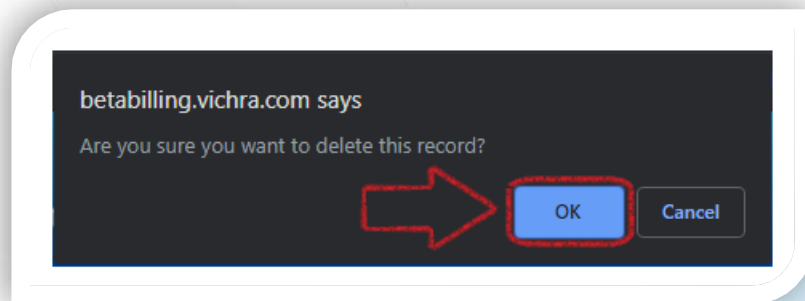


#### 4. Managing Notes

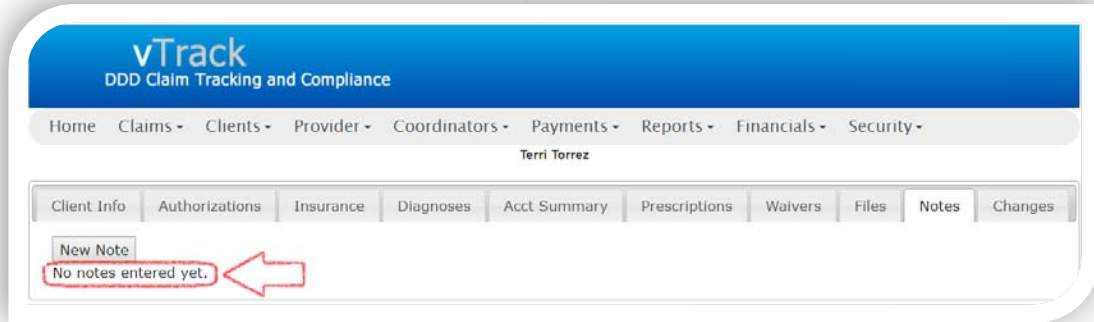
- ❖ *If there is an error or the notes need to be modified you will need to delete and re-enter the note*
  - Click-> The red X next to the note



- You will receive a pop-up asking you to confirm the deletion
- Click-> OK



- Success! The note has been deleted



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**\*\*For additional support, please contact us at [vTrack@Vichra.com](mailto:vTrack@Vichra.com)\*\***

