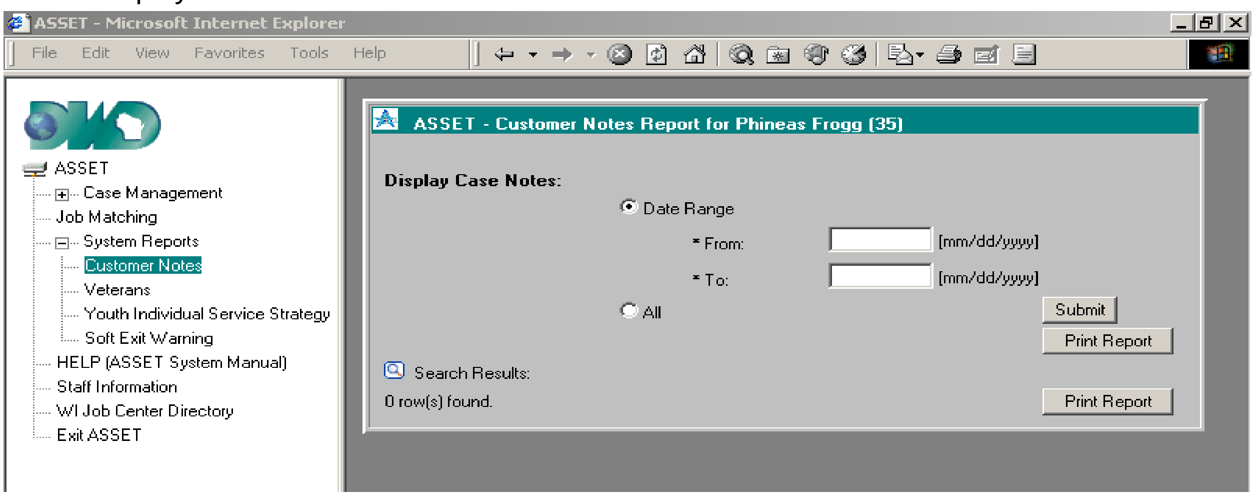
ASSET Users' Guide

ASSET SYSTEM REPORTS

5-2 CUSTOMER NOTES

The **Customer Notes Report** gives a case manager an opportunity to create a listing of Customer Notes in a format where a worker can see all the narratives and print the notes in their entirety.

To access the Customer Notes Report, open the Systems Reports by clicking on the plus sign (+) on the Menu Tree. Next, click on the Customer Notes Report option. Begin by selecting a customer from the list of Previously Searched for Customers, or find a new customer using the Search function. Once a customer is selected click on that individual's PIN. The following page is then displayed:



This options box allows the worker to choose how the report is to be created. These are the fields.

FIELD	DESCRIPTION
• **Date Range**	Click on this radio button if only specified notes need to be retrieved. Enter the dates (From and To) of the Customer Notes desired. The date format must be correct.
• **All**	Click on this radio button if all the Customer Notes associated with this customer are to be retrieved.

Click on the Submit button and a page is returned with all the Customer Notes requested. The Print Report button allows for the printing of all the selected notes.

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