

**Audit Tools in Central Reach**

1. Pull up individual child’s record in Central Reach
2. Go to Notes and Forms Widget



1. Hover curser over widget until Create Note appears. Click on Create Note button



1. Click on Add New



1. Click on ACT Child Record Audit Tool



1. The document title will appear, however, it will not autogenerate the region/team. Add region/team to Title



1. Click on Client Information section and add I-Teams ID and Service Coordinator



1. Click Next to move to the Initial Phone Call/Initial Visit section or Click on Change Section to move to the audit tool that is being completed.
2. Click on Save when all audit tools are completed at that time.
	1. **Do not click on Save and Lock unless you do not want this to be a running record. This will not allow any further audits to be added to this file and another one will need to be created for subsequent audits for this child.**
3. Once Saved, this will add to files and any time you need to complete a new audit, click on it in the Notes and Form section



1. Click on the file folder to the far right and it will open the document in files. Share with your region/team.





1. Example of what you will see within the audit tools:

