

Progress Notes Filters

Progress notes can be filtered by Session Date, Code Number with Description and File/Sign Status. One or more filters can be used at a time. The more filters used, the more you results will be filtered down.

The screenshot shows the filter interface with the following elements:

- Note Selection**: Clear Filters button.
- Session Date**: A red box highlights the 'Session Date' label. Below it are two calendar icons and the text 'to Enter Date'.
- Code**: A red box highlights the 'Code' label.
- Description**: A red box highlights the 'Description' label.
- File/Sign Status**: A red box highlights the 'File/Sign Status' label.
- Print/File Selection**: Print/File Selection button with a checkmark.
- Filter**: A dropdown menu labeled 'Filter'.
- Apply Filters**: A button to apply the selected filters.

Session Date Filter: The date range filter allows for ease of finding notes that occurred in a specific date range. Dates may be entered by typing or by using the associated calendar control. The dates must be in a valid format (MM/DD/YYYY) for the filter to function. A blank box in the filter field will act as a boundless filter, for example if the first field you entered of 03/01/2017 and not a date in the second, it would display all notes for the client on and after 03/01/2017.

The screenshot shows the following table of notes:

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	08/09/2017	205	Individual Therapy	--	<input type="checkbox"/>
<input type="checkbox"/>	05/23/2017	333	Group Session Counseling	--	<input type="checkbox"/>
<input type="checkbox"/>	05/02/2017	CM04	Case Management - BA - Out of Office	--	<input type="checkbox"/>
<input type="checkbox"/>	04/25/2017	CM01	Case Management - MA - In Office	--	<input type="checkbox"/>
<input type="checkbox"/>	04/03/2017	101	Assessment	--	<input type="checkbox"/>
<input type="checkbox"/>	03/14/2017	333	Group Session Counseling	--	<input type="checkbox"/>
<input type="checkbox"/>	03/13/2017	333	Group Session Counseling	--	<input type="checkbox"/>
<input type="checkbox"/>	03/01/2017	1001	No Service Code	--	<input type="checkbox"/>

Buttons at the bottom: Add Group Note, Add Individual Note, Add From Scheduler, View Note, Delete Note, Print, File and Sign, Close.

Progress Notes Filters

[Filter by: Code] Allows for ease of finding notes by specific code by display all session types in code number sequence. Simply select the sessions you want to filter on then click the [Apply Filter] button to narrow down your list

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input type="button" value="Clear Filters"/>	03/01/2017 <input type="button" value="Calendar"/> to <input type="text" value="Enter Date"/> <input type="button" value="Calendar"/>	4 items checked <input type="button" value="Apply Filters"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	08/09/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	05/23/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	05/02/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	04/25/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	04/03/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/14/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/13/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/01/2017	1001	No Service Code	--	<input type="checkbox"/>

Select Session Types to Display

Filter By: Code Description

Check All

1001 - No Service Code

101 - Assessment

205 - Individual Therapy

2884 - Authorization for Insurance

333 - Group Session Counseling

400 - Music Therapy

[Filter by: Description] Allows for filtering the notes by specific session types in alphabetical order. Simply select the sessions you want to filter on then click the [Apply Filter] button to narrow down your list

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input type="button" value="Clear Filters"/>	03/01/2017 <input type="button" value="Calendar"/> to <input type="text" value="Enter Date"/> <input type="button" value="Calendar"/>	3 items checked <input type="button" value="Apply Filters"/>			<input type="checkbox"/>
<input checked="" type="checkbox"/>	08/09/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	05/23/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	05/02/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	04/25/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	04/03/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/14/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/13/2017			--	<input type="checkbox"/>
<input type="checkbox"/>	03/01/2017	1001	No Service Code	--	<input type="checkbox"/>

Select Session Types to Display

Filter By: Code Description

Check All

Art Therapy - 999

Assessment - 101

Authorization for Insurance - 2884

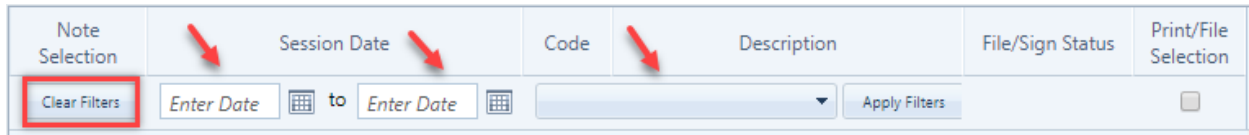
Case Management - 555

Case Management - BA - In Office - CM03

Case Management - BA - Out of Office - CM04

Progress Notes Filters

Clear Filter Button: The [Clear Filter] button will clear all filters that have been entered and display all the notes for the selected client. It will however retain the sort order in the progress notes grid.



Sorting Notes using the Heading Filters: When moving your mouse under each heading you will notice it changes to a point hand. When this happens you simply click the heading to change the sort order to ascending. Click it again and the sort order changes back to descending. All four headings in the progress notes module have this ability.

