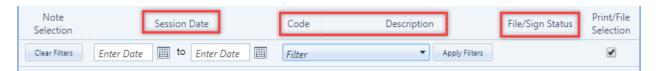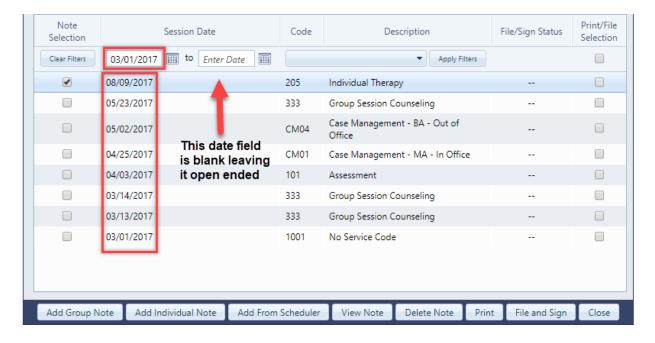# Progress Notes Filters

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.



**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.

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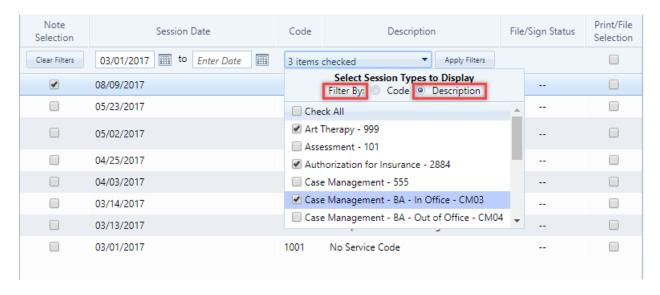
**[Filter by: Code]** Allows for ease of finding notes by specific code by display all session types in code number sequence. Simply select the sessions you want to filter on then click the [Apply Filter] button to narrow down your list

| Note Selection | Session Date | Code | Description | File/Sign Status | Print/File Selection |
|---|---|---|---|---|---|
| Clear Filters | 03/01/2017 ▦ to *Enter Date* ▦ | 4 items checked ▼ Apply Filters | | | ☐ |
| ☑ | 08/09/2017 | | **Select Session Types to Display**<br>Filter By: ⦿ Code ○ Description | -- | ☐ |
| ☐ | 05/23/2017 | ☐ Check All | | -- | ☐ |
| ☐ | 05/02/2017 | ☑ 1001 - No Service Code | | -- | ☐ |
| | | ☐ 101 - Assessment | | | |
| ☐ | 04/25/2017 | ☑ 205 - Individual Therapy | | -- | ☐ |
| ☐ | 04/03/2017 | ☑ 2884 - Authorization for Insurance | | -- | ☐ |
| ☐ | 03/14/2017 | ☐ 333 - Group Session Counseling | | -- | ☐ |
| ☐ | 03/13/2017 | ☑ 400 - Music Therapy | | -- | ☐ |
| ☐ | 03/01/2017 | 1001 | No Service Code | -- | ☐ |

**[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 |
|---|---|---|---|---|---|
| Clear Filters | 03/01/2017 ▦ to *Enter Date* ▦ | 3 items checked ▼ Apply Filters | | | ☐ |
| ☑ | 08/09/2017 | | **Select Session Types to Display**<br>Filter By: ○ Code ⦿ Description | -- | ☐ |
| ☐ | 05/23/2017 | ☐ Check All | | -- | ☐ |
| ☐ | 05/02/2017 | ☑ Art Therapy - 999 | | -- | ☐ |
| | | ☐ Assessment - 101 | | | |
| ☐ | 04/25/2017 | ☑ Authorization for Insurance - 2884 | | -- | ☐ |
| ☐ | 04/03/2017 | ☐ Case Management - 555 | | -- | ☐ |
| ☐ | 03/14/2017 | ☑ Case Management - BA - In Office - CM03 | | -- | ☐ |
| ☐ | 03/13/2017 | ☐ Case Management - BA - Out of Office - CM04 | | -- | ☐ |
| ☐ | 03/01/2017 | 1001 | No Service Code | -- | ☐ |

# 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 happen you simple click the heading to change the sort order to ascending. Click it again and sort order changes back to descending. All four headings in the progress notes module have this ability.\