

Is there a way to print a client's progress notes in bulk?

Question:

Is there a way to print a client's progress notes in bulk?

Solution:

Yes, you can only print bulk notes for an individual client. In the screenshot below you would pull up a group, then select a client to see all of their note descriptions. Next check all or some Print/Selection boxes and print. Repeat these steps for each client in the group.

Open Progress Notes

Step #1 – Select a group

Step #2 – Select a client in the group

Step #3 – Check all Print/File Selections you wish to print

Step #4 – [Print] button

The screenshot shows the 'Progress Notes' interface. At the top, there is a 'Select by' section with radio buttons for 'Client' and 'Group'. The 'Group' option is selected, and a dropdown menu shows 'Gambling Outpatient Group'. Below this is a 'Retain Filters' checkbox. A client list is displayed with columns for Name, SSN, and Client Reference #. The list includes Rose, s, Paul, hal, Kelly, Sally, r, Mark, and i, Lisa. Below the client list is a table of notes with columns for Note Selection, Session Date, Code, Description, File/Sign Status, and Print/File Selection. The table contains several rows of notes, with the first row selected. The 'Print/File Selection' column has checkboxes for each row, and the 'Print' button at the bottom is highlighted with a red box. Red arrows and numbers 1-4 indicate the steps: 1. Select 'Group', 2. Select a client, 3. Check 'Print/File Selection' boxes, 4. Click 'Print'.

Note Selection	Session Date	Code	Description	File/Sign Status	Print/File Selection
<input checked="" type="checkbox"/>	10/01/2018	1470	IOP Intake	Signed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/28/2018	952	Individual -Basic Outpatient	Signed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/25/2018	1452	Individual -IOP	Signed	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/19/2018	1070	Gambling Admission (Intake)	--	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/17/2018	1152	FAC Individual	--	<input checked="" type="checkbox"/>
<input type="checkbox"/>	09/10/2018	125	Jail Evaluation	--	<input checked="" type="checkbox"/>

An alternative option would be to purchase a Chart Management subscription to electronically file and sign all your documents. This would place all created documents in one place for review and auditing purposes as well as save on printing and storage of documents.

For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!