Accessing the Progress Notes Window

1. Select a CPS Investigation stage (INV) or Family Services stage (FSS) from your workload.

2. Select the Progress Notes link on the NAVIGATION PANE.
   - In an Inv stage, the Child Protective Record Summary (CPRS) window displays with the Progress Notes tab active.
   - In an FSS stage, the Progress Notes window displays. When you close the window, you return to your workload.

The Progress Notes window is comprised of three sections:
- the Search Progress Notes fields at the top of the window,
- the search results grid in the middle, and
- buttons along the bottom.

When the Progress Notes window contains more than one entry, a grid appears.

Use the Search and Sort options to reduce the number of progress notes that display in the grid for research, review or printing purposes.

Searching Progress Notes

The fields at the top of the Progress Notes window are the criteria by which you may conduct a search. You may select one, several or all of the fields as search criteria to search for specific notes. Except as noted, you may only select one value in each field used for search criteria. Search criteria fields include the following:

- **Date Range**
  To search for notes that fall between specific dates, click on the checkbox in the From Event Date field and use the pull down calendar to choose the start date of the search. Click on the checkbox in the To Event Date field and choose the end date of the search. Each field defaults to today's date.
  To search for a specific event date, use the same date in both fields. To search on an open-ended date, enter a date in only one of the date fields and leave the other one blank.

- **Type**
  To search by type of contact, click on the ellipsis button to the right of the Type field. The pop-up list displays all the types of contacts available. Click in the check box for one or more of the desired values.

- **Author**
  To search by author, click on the Author field. The drop-down list displays all the persons who have authored a progress note in the stage.

- **Family Participant**
  To search by family participant, click on the Family Participant field. The drop-down list displays all persons listed in the person list or stage composition.

- **Method**
  To search by method of contact, click on the Method field. The drop-down list displays all the methods of contact available.
• **Entered by**
  To search by entered by, click on the **Entered By** field. The pop-up list displays all the workers who have entered a Progress Note within the stage.

• **Other Participant**
  To search by other participant, click on the **Other Part** field. This field is used to search for specific notes based on a category (not the name) of other participants selected (e.g., School Staff, Medical, Probation).

• **Purpose**
  To search by purpose, click on the **Purpose** field. The drop-down list displays all the purposes available.
  
  *For a list of conditionally required purposes in the drop-down list and for instruction on when some of these choices are available, use the F1 key to reach Help and click the hyperlink for Purpose.*

• **District/Agency**
  To search by District or by Agency, click on the **District/Agency** field. Enter the three digit District or Agency code.
  
  *The available codes can be found in the Dist Agy column on the grid. Scroll to the right to display this column.*

• **Focus**
  To search by the person who was recorded as the focus of a progress note, click on the **Focus** field. All members of the person list or stage composition appear in the drop-down list.

• **Location**
  To search by the location of the contact, click on the **Location** field. The drop-down list displays all the locations available.

**Refresh List Button**

Clicking the **Refresh** button removes all search criteria and refresh the list so that all progress notes once again display. This button enables once a search has been conducted.

**Sorting Progress Notes**

By default, progress notes are sorted in ascending order by **Event Date**. There are two additional methods to sort notes:

• In the **Search Results** grid, click on the heading of the column by which you wish to sort. The list displays in ascending order.
• Select Sort from the **Options** menu to open the **Sort Notes** window. Select up to three sort fields and ascending or descending order for each sort.

<table>
<thead>
<tr>
<th>District/Agy</th>
<th>From Event Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>A01</td>
<td>4/20/08</td>
</tr>
<tr>
<td>A01</td>
<td>5/02/08</td>
</tr>
<tr>
<td>A02</td>
<td>4/19/08</td>
</tr>
<tr>
<td>A02</td>
<td>5/10/08</td>
</tr>
<tr>
<td>A06</td>
<td>4/10/08</td>
</tr>
<tr>
<td>A06</td>
<td>5/10/08</td>
</tr>
<tr>
<td>A06</td>
<td>5/18/08</td>
</tr>
<tr>
<td>A09</td>
<td>4/3/08</td>
</tr>
</tbody>
</table>

The list of progress notes can be searched, sorted or both.

**Previewing and Printing Progress Notes**

Once progress notes have been searched and/or sorted, you can easily print the resulting notes.

1. Select the notes you want. Hold down the **Ctrl** key while clicking on the desired notes to select them or click on the **Select All** button to highlight your entire list of search results.
2. Click the **Print Note(s)** button. *This action does not print the selected notes – it opens the Print Notes window.*
3. Select Data Fields and Narrative or Data Fields Only.
4. Select desired font size and click the **OK** button. The print preview displays. Scroll down to read the notes.

  *The Find button on the print preview window can be used to locate specific words in the narratives.*
5. Print notes (if desired) by clicking the **Print** button. Click the **Close** button, then the **Cancel** button to return to the Progress Notes window.

**Reminder:** *In all areas of CONNECTIONS, you can press F1 for help*

**Resources:**

CONNECTIONS Step-By-Step Guides:
http://ocfs.state.nyenet/connect/jobaides/

CONNECTIONS Regional Implementation Staff:
http://ocfs.state.nyenet/connect/contact.asp

CONNECTIONS Application questions:
ocfs.sm.conn_app@ocfs.state.ny.us *(NOTE: address contains an underline)*

CONNECTIONS Communications
CONNECTIONSCommunications@dfa.state.ny.us

**NYS OFT Customer Care Center #**
1.800.697-1323