



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.

Progress Notes - S-27200499/C:37200139
File Options Help
Case Name: Collins,Kristy Case Initiation Date: 4/24/2009

Search Progress Notes

From Event Date: 8/21/2009 To Event Date: 8/21/2009 Type: ...
 Author: Family Part: Method: ...
 Entered By: Other Part: Purpose: ...
 District/Agency: Focus: Location: ...

Refresh List Search

Event Date	Note Status	Type	Method	Location	Participant	Other Participant	A
5/26/2009	Final	Casework Contact, Coll	Face To Face	Foster Home	Collins,Kimberly, Collins,F	Foster/Adoptive Parent	W
5/20/2009	Final	Casework Contact	Phone		Collins,Kristy		W
5/8/2009	Final	Collateral Contact	Phone			Foster/Adoptive Parent	W
5/5/2009	Final	Casework Contact	Phone		Collins,Kristy		W
5/1/2009	Final	Casework Contact, Coll	Face To Face	Case Address	Collins,Kristy	School Staff	W
4/28/2009	Final	Casework Contact	Face To Face	Case Address	Collins,Kristy		W
4/28/2009	Final	Family/Primary Discharg	Face To Face	LDSS Office/Field Office	Collins,Kimberly, Collins,F		W

New Using View Note New Note Edit Note Copy Note Select All Print Note(s) Close

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



If a stage has more than 200 progress notes entered, you can view them by clicking on the arrow at the bottom right side of the screen.

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 Part** 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.

For example, if **District/Agency** is selected as primary **Sort By** field and **From Event Date** as the secondary (“**Then By**”) field, the progress notes displays in the order listed in the grid at right.

District/Agy	From Event Date
A01	4/20/08
A01	5/02/08
A02	4/19/08
A02	5/10/08
A06	4/10/08
A06	5/10/08
A06	5/18/08
A09	4/3/08

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 if 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

<p>NYS OFT Customer Care Center # 1.800.697-1323</p>
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