



### Accessing the Progress Notes window

1. Select a CPS Investigation stage (INV) or Family Services stage (FSS) from the *Assigned Workload* (the Progress Notes button enables)
2. Click on either the **Tasks...** button or the **Progress Notes** button.

When using the **Progress Notes** button.....

- In an **Inv** stage, the *Child Protective Record Summary (CPRS)* appears with the *Progress Notes* window open.
- For an **FSS** stage, only the *Progress Notes* window is displayed. While in this window, clicking on the *Close* button will return you to the *Assigned Workload* window. In order to access the case, click on the **Tasks** button.

The Progress Notes window is comprised of three sections:

- the Search Progress Notes fields at the top of the tab,
- the Search Results grid in the middle, and
- buttons along the bottom.

Progress Notes - S:27201735/C:37200448

File Options Help

Case Name: Collins,Kristy Case Initiation Date: 4/24/2009

**Search Progress Notes**

From Event Date:  8/18/2009 To Event Date:  8/18/2009 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
4/28/2009	Draft	Casework Contact	Face To Face	Case Address	Collins,Kristy		w
4/28/2009	Draft	Family/Primary Discharge	Face To Face	LDSS Office/Field Office	Collins,Kristy; Collins,K		w

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

When the Progress Notes screen has more than one entry, a grid appears. Using the Search and Sort options allows workers to reduce the number of Progress Notes to research or review.



Only the most recent 200 notes will appear on the grid. If a case 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 a search can be conducted. A worker can select one, several or all of the search criteria to search for specific notes. Progress Notes can be searched, sorted or both.

Search Criteria fields include the following:

- **Date Range**

To search between specific dates, check the checkbox in the **From Event Date** field and use the pull down calendar to choose the start-date of the search. Check the checkbox in the **To Event Date** and choose the end date of the search. Each field defaults to today's date unless another date is chosen.

*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 **Type** field. The pop-up list displays all the types of contacts available.

- **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 Stage Composition.

- **Method**

To search by method of contact, click on the **Method** field. The drop-down list displays all the methods of communication available with the family and/or child(ren).

- **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 of Progress Notes.

*For a list of conditionally required purposes in the drop-down list and for instruction on when some of these choices will be available use the **F1 Field Level Help** button 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 code for a specific District or Agency can be found in the column to the right of the Author column on the Progress Notes window. Scroll to the right to reveal 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 stage composition appear in the drop-down list. Highlight the name of the desired person.

- **Location**

To search by the location of the contact, click on the **Location** field. The drop-down list displays all the Locations available in the CONNECTIONS application. Click on one to select it.

**NOTE:** Any of the above search criteria can be used in combination to further refine a search.



### Refresh List Button

Clicking the Refresh button will remove 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 on the toolbar 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 will display in the order listed in the grid at right.

District/Agency	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

### 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 (*available as of 10/10/08*) and click **OK**. 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](mailto:ocfs.sm.conn_app@ocfs.state.ny.us) (NOTE: address contains an underline)  
 CONNECTIONS Communications  
[CONNECTIONSCommunications@dfa.state.ny.us](mailto:CONNECTIONSCommunications@dfa.state.ny.us)

NYS OFT Enterprise Help Desk # 1.800.697-1323
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