

# PRINTING PROGRESS NOTES

1. Select Program from the Program Dropdown menu on the Home Page

The screenshot shows the Home page of the CAES system. At the top, there is a navigation bar with 'AWARDS', a search box, and links for 'HOME', 'CALENDAR', 'MESSAGES', and 'REPORTS'. The user is identified as 'Sue P.'. Below the navigation bar, there are several filters: 'Program Group', 'All Program Types', 'Division', 'All Agencies', 'HMS Options', and 'All HMS Project Type'. A red arrow points to the 'Program:' dropdown menu, which is currently set to 'Training - Case Management'. On the left side, there is a sidebar with a 'Home' icon and a list of menu items: 'Census', 'Charts', 'Administration', and 'FootholdConnect'. The main content area is titled 'Census Activities' and contains four buttons: 'Intake/Admission', 'Discharge', 'Housing', and 'Profile'.

2. Select Report Menu on the Top Navigation Bar

The screenshot shows the Home page of the CAES system. A red arrow points to the 'REPORTS' link in the top navigation bar. The rest of the page is identical to the previous screenshot, showing the navigation bar, filters, sidebar, and main content area.

3. Select "All" from the Show Reports Menu on the left side bar

The screenshot shows the Reports page of the CAES system. A red arrow points to the 'All' option in the 'Show Reports' menu on the left side bar. The main content area displays a table of reports with columns for 'Name', 'Module', and 'Description'. The table is filtered by 'All Columns'.

Name	Module	Description
Absences Report	Human Resources	Contains employee absences information for a selected employee, including seniority date, absence dates and types, days out, time off request and approval dates, approver, and total absences.
Acuity Scores ReportBuilder	Fiscal / Program	Used to generate customized reports of basic client demographics and detailed acuity scores information.
Administrative Information Report	System Setup	Contains program configuration information, including program location and program officers information.
Agency Program Information	System Setup	Contains agency program information, including program name, program group, residence units, LS3 monthly average, DAS housing capacity, and NY/NY housing capacity information.
Agency Programs ReportBuilder	System Setup	
Allergies ReportBuilder	Medical	

- Type "Progress Notes" into the Search Field and hit Enter on your keyboard

Program: Training - Case Management

Search: progress notes Filter by: All Columns

Name	Module	Description
Contact Lapse Audit Report	Services	Contains contacts lapse information for a selected program, including service coordinator, consumer, date on which the last contact was documented, number of days since the date last documented, other progress note writers for a consumer (if applicable), and the number of progress notes written by the coordinator in the last 15 days.
Contacts Log Report	Services	Contains contacts log entries for a selected consumer and date range, including contact date, length, service type, and worker name information, as well as the total number of contact hours, contacts, and notes for the consumer, worker, or date, and the overall total number of contact hours, contacts, and progress notes.
Employment Contacts Log Report	Employment	Contains employment related contacts log entries for a selected consumer and date range, including contact date, length, service type, and worker name information, as well as the total number of contact hours, contacts, and notes for the consumer, worker, or

- Scroll through the list of reports to find Progress Notes Report

progress notes

Employment Progress Notes Report	Employment	Contains employment related progress notes for a selected consumer and date range, including note text, writer, note type, contact duration and type, and if applicable, goal and objective/method or service. This report may also contain group notes for the selected consumer when applicable.
Note Viewing Report	Services	Contains information on users who have viewed consumer progress notes in a selected program in the last 5 days, including consumer, writer, note type, encounter date and time, date on which the note was written, date on which the note was viewed, and note views.
Progress Notes Report	Services	Contains progress notes for a selected consumer and date range, including note text, writer, note type, contact duration and type, and if applicable, goal and objective/method or service. This report may also contain group notes for the selected consumer when applicable.
Progress Notes ReportBuilder	Services	Used to generate customized reports of basic client demographics and detailed client services data as recorded using progress notes.
Progress Notes Utilization Report	Utilization	Contains progress notes summary information based on a variety of selection criteria.
Service Contacts ReportBuilder	Services	Used to generate customized reports of basic client demographics and detailed client services information collected using group notes, group activity attendance records, progress notes, and the contacts log (basic or supportive services checklist)

- Click on Progress Notes Report to display the Progress Notes Report Selections Page. You can now Select the Consumer Name and Date Range then click on the SHOW NOTES button to view

Training - Case Management Progress Notes Report Selections

Writer: All Writers Consumer: All Consumers Date Range: From: 11/29/2017 To: 12/13/2017

Roster Archives

Merge with Group Notes

Include Medical Appointment Notes

Select Individual Note Sections

Insert Printing Page Break After Every Note

All Progress Notes

Keyword Search: \_\_\_\_\_

