

Missing Appointments and Notes Report

Last Modified on 03/28/2022 9:04 am EDT

Path: Main Menu > Reports Menu > Reports > Missing Appointments and Notes

About

The Missing Appointments and Notes Report provides data on appointments and Notes written for a client for a given date range. This report can be used to determine which appointments don't have Notes or which Notes don't have appointments.

Run the Missing Appointments and Notes Report

1. Navigate to the Missing Appointments and Notes Report by following the path above.
2. In the Preview Parameters panel complete the following fields:
 - **Start Date** and **End Date:** Defaults to the current month. Click the calendar and select a date or type a date into the field. If this field is left empty, all data is retrieved.
 - **Case Status:** Defaults to All selected (3) which includes Pending, Active, and Discharged cases. Click into the field and select or deselect the checkboxes for Pending, Active, and Discharged.
 - **Missing:** Defaults to All. To specify what's missing, select one of the following:
 - **All:** Includes appointments without Notes, Notes without Appointments, and Notes with appointments.
 - **Notes:** Includes appointments that are missing Notes.
 - **Appointments:** Includes Notes that are missing appointments.
 - **Both:** Includes both appointments that are missing Notes and Notes missing appointments.
 - **Clients:** If left blank, all clients are included. Click into the field and type to search for a client or clients and select the checkbox(es). The clients that are visible are the clients the user has access to.
 - **Locations:** If left blank, all Locations are included. This is the Scheduler appointment Location and is used to filter the appointments. Click into the field and type to search for the Location(s) and select the checkbox(es).
 - **Resources:** If left blank, all Resources are included. Click into the field and type to search for the Resource(s) and select the checkbox(es). This is used to filter appointments.
 - **Appointment Status:** If left blank, all appointment statuses are included. Click into the field and type to search for the Appointment Status(es) and select the checkbox(es). This is used to filter appointments.
 - **Activities:** If left blank, all Activities are included. Click into the field and type to search for the Activity or Activities and select the checkbox(es). This is used to filter appointments.
 - **Providers:** If left blank, all Providers are included. Click into the field and type to search for the Provider(s) and select the checkbox(es). This is used to filter Notes.
 - **Separate Clients:** Defaults to No, which shows multiple patients on one page. Click the drop-down and select Yes if you'd like each individual client on their own page.
3. Click the **Submit** button. The data is displayed.

Example of the report when selecting "All" from the Missing search criteria:

Note	Date	Status	Started By	Billing Times
Client ID:	2206	Client Name:	Demo guy	1
DATE	3/8/2022	15-Minute Med Check with emuserone @ 09:00 on 3/8/2022 for 30 minutes at Default		
Client ID:	2216	Client Name:	Inactive test Inactive test	2
DATE	3/7/2022	New Patient with ndhandapani @ 10:30 on 3/7/2022 for 30 minutes was Attended at Loc 4		
Misc Note	3/7/2022	Finalized	[Redacted]	11:00-06:30
Misc Note	3/7/2022	Finalized	[Redacted]	
Client ID:	2322	Client Name:	Test Bedson	3
DATE	3/3/2022	Notes without appointment		
Nurse Note	3/3/2022	Draft	[Redacted]	
DATE	3/7/2022	Notes without appointment		
Nurse Note	3/7/2022	Finalized	[Redacted]	

Number	Data Displayed
1	For this example, the report shows an appointment that does not have an associated Note.
2	For this example, the report shows an appointment that has two Notes associated.
3	For this example, the Notes are shown that do not have appointments associated with them.

Note: Hover over the icons at the top of the report to see a description of what each icon does. From here, you can page through the report, toggle multi-page mode, zoom, export, print, and search.

