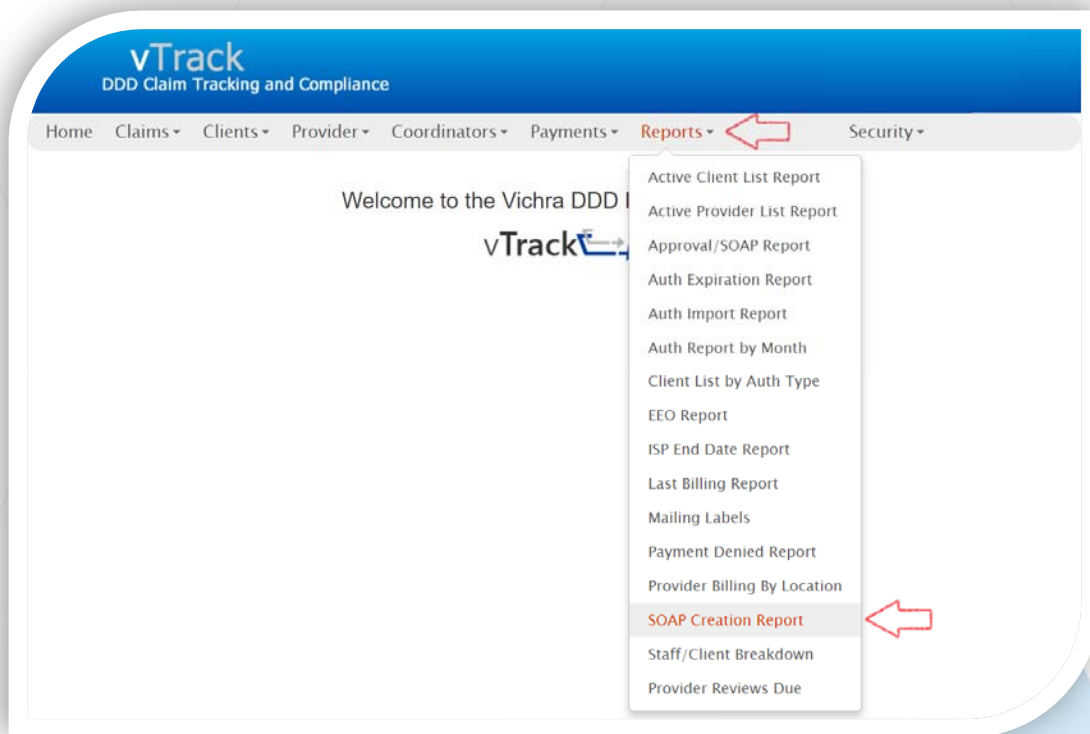


How to Use the SOAP Note Creation Report

This report will display a list of client's appointments with notes attached. The output data can be simplified by using the following report filters: Creation Date Range, Client, Bill Type, Provider, and Service.

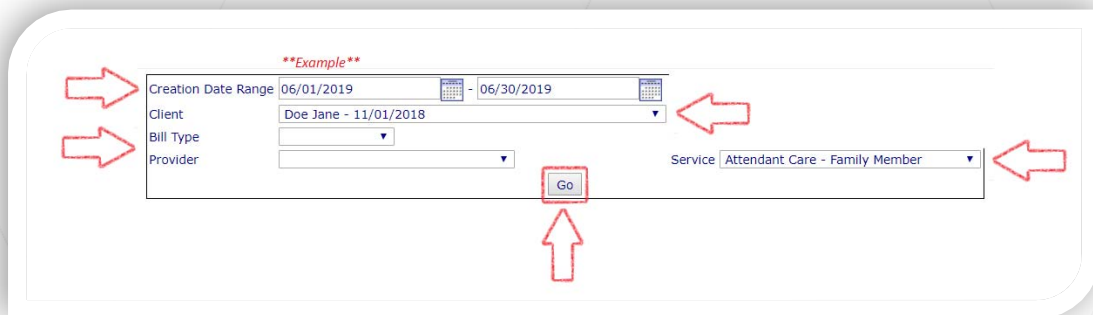
1. **Navigate to the Reports Drop-Down Menu**
 - Select-> SOAP Creation Report



2. Input Creation Date Range and Search Criteria

- Enter-> Creation Start Date
- Enter-> Creation End Date
- Select-> Client from the drop-down menu
- Select-> Bill Type from the drop-down menu
- Select-> Provider from the drop-down menu
- Select-> Service from the drop-down menu
- Click-> Go

****Example****



The screenshot shows a search form with the following fields and values:

- Creation Date Range: 06/01/2019 - 06/30/2019
- Client: Doe Jane - 11/01/2018
- Bill Type: (blank)
- Provider: (blank)
- Service: Attendant Care - Family Member

A "Go" button is located below the Provider field. Red arrows point to the date range, Client, Bill Type, Provider, and Service fields, and the Go button.

****Please note: If any fields are left blank or a filter is not selected, all records for that criteria selection will appear****


3. Viewing Your SOAP Creation Report

- A list of appointments with notes attached will appear

SOAP Note Creation Report					
Creator	Creation Date/Time	Provider	Client	Event Date	Status
demo	06/28/2019 13:06	Teddy Doe	Jane Doe	01/20/2019 08:00	Completed

- Click-> Provider's name to open the Provider's portal
- Click-> Event Date to open the appointment containing the note

SOAP Note Creation Report					
Creator	Creation Date/Time	Provider	Client	Event Date	Status
demo	06/28/2019 13:06	Teddy Doe	Jane Doe	01/20/2019 08:00	Completed



****For additional support, please contact us at vTrack@Vichra.com****

