

How to Search for a Clinical Note

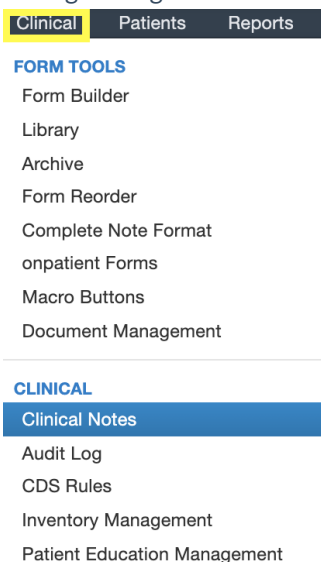
07/08/2024 7:59 pm EDT

You may access the Clinical Report Tool to search through your clinical notes, for example, if you want to search for clinical notes that need to be locked.

The Clinical Report Tool will allow you to search for clinical notes by:

- Office Name
- Provider Name
- Lock Status
- Patient Name
- Username
- Keyword
- Date Range

To begin using the Clinical Report Tool, mouse over **Clinical** in your navigation bar and select **Clinical Notes**.



Once you select **Clinical Notes**, you will reach the **Clinical Report Tool**. You may use any or all of the filters to filter your results, leaving unused filters blank. For larger volumes of offices and providers, selections are collapsed within their corresponding sections for better accessibility. To reveal those selections, click on the **Offices** or **Doctors** section.

[Edit Selection](#)

Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled

[Edit Selection](#)

SOAP Notes Clinical Report

Offices [Edit Selection](#)
Eastern Office, Main PG Office, Mountain Office, Telehealth

Doctors [Edit Selection](#)
Dr. James Smith

Locked Status Need supervising Need rendering Exclude Cancelled, No-Show, and Rescheduled **View Last:** Day Week Month Year

Patient's Name User's Name Contains Text 11/09/2021 11/16/2021 [Refresh](#)

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Patient	Date & Time	Rendering Provider	Supervising Provider	Locked (Rendering Signed)	Supervising Signed Off	
Sample Patient	11/16/2021 12:10 PM	James Smith	None	Signed by Sample Doctor	Not Needed	View Note
Sample Patient	11/10/2021 09:05 AM	James Smith	None	No	Not Needed	Start Note
Sample Patient	11/11/2021 09:20 AM	James Smith	None	No	Not Needed	Start Note
Sample Patient	11/09/2021 11:45 AM	James Smith	None	No	Not Needed	Start Note

Patient's Name User's Name Contains Text 11/09/2021 11/16/2021 [Refresh](#)

View Last: Day Week Month Year