

SETTING PRESET FILTERS

Users are now able to Preset Filters on the Patient Agreements, Needs Follow Up, Billing Submission and Missing ICD-10 tabs. The new feature assists users by allowing them to save commonly used filters to make workflows more efficient. Follow the instructions below on how to Preset filters.

On the selected tab, users should first select the appropriate filters to preset. Users can set multiple presets to accommodate all the different filtering needed based on their workflows. Any selected filters will be highlighted in **Green**. Once all filters are selected, **Save New Preset**.

The screenshot shows the 'Patient Agreements' interface. At the top, there are tabs for 'Patient Agreements', 'Needs Follow Up', 'Billing Submission', and 'Missing ICD-10'. Below the tabs, there is a 'Filter by' section with a search bar and a list of filter categories: 'Incomplete', 'All Clinics', 'All Providers', 'All Creators', 'All Payment Types', 'All Categories', 'All Dates', and 'All Additional Filters'. A red box highlights the 'All Clinics' filter, which is currently selected. Below the filter list, there is a 'Search Presets' section with an 'Edit Preset' button and a 'Save New Preset' button. A red box highlights the 'Save New Preset' button, and a mouse cursor is shown clicking on it. The main content area displays 'Displaying patient agreements 1 - 10 of 117 in total' and a pagination control.

A pop-up box will appear asking for users to assign a Preset name. Fill out the Preset name box and select **Save New Preset**.

The screenshot shows a 'Save New Preset' pop-up box. It has a title bar with a close button (X). Below the title bar, there is a 'Preset name' field with a red box around it. Below the name field, there is a 'Summary' section with the text 'All Patient Agreements matching CSA Orthopedics (South)'. At the bottom of the box, there are two buttons: 'Cancel' and 'Save New Preset'. A red box highlights the 'Save New Preset' button, and a mouse cursor is shown clicking on it.

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All preset filters will now be available in the **Select a Saved Search** box at the top of the filters. Select name of the preset and it will auto-default to the selections set.

Patient Agreements New Patient Agreement

Patient Agreements Needs Follow Up Billing Submission Missing ICD-10

Select a Saved Search

Select a Saved Search

Incomplete PA's CSA Main

Search...

Incomplete

All Clinics

All Providers

Displaying patient agreements 1 - 10 of 117 in total Expand All

1 2 3 ... > >>

Repeat these steps as needed to create multiple presets. NOTE: Preset filters apply to the specific tab they are created under. Users will need to create unique preset filters under each tab as needed.