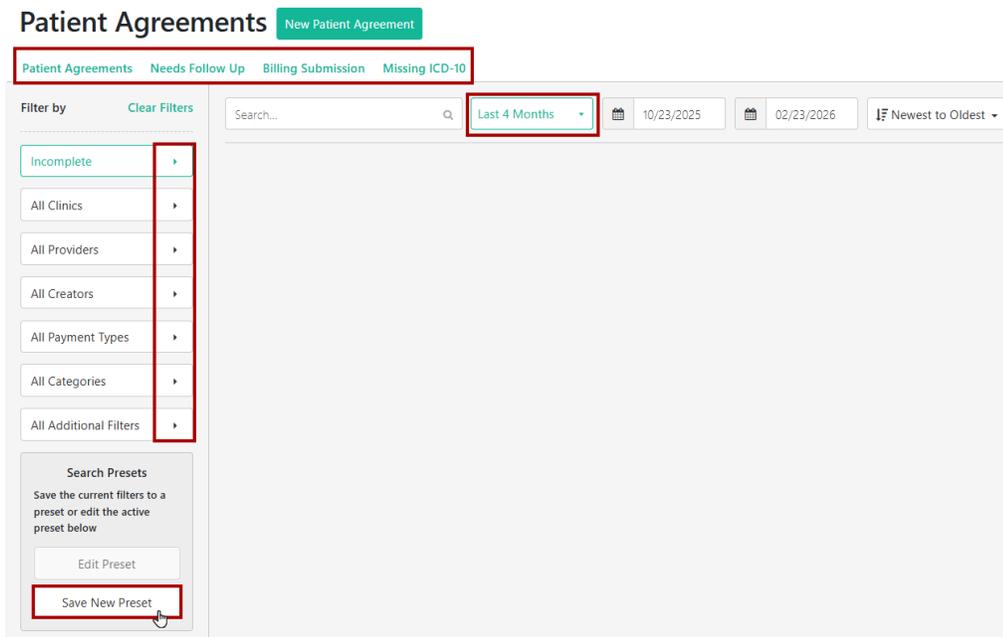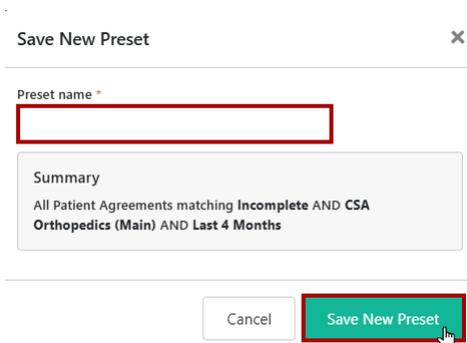## SETTING PRESET FILTERS

Users have the ability to Preset Filters on the Patient Agreements, Needs Follow Up, Billing Submission and Missing ICD-10 tabs. The 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**.

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

SETTING PRESET FILTERS

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

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.