TreatWrite™
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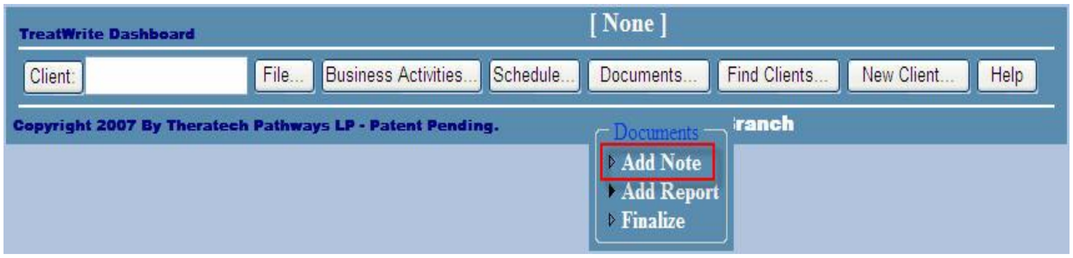
Creating Daily Treatment Notes

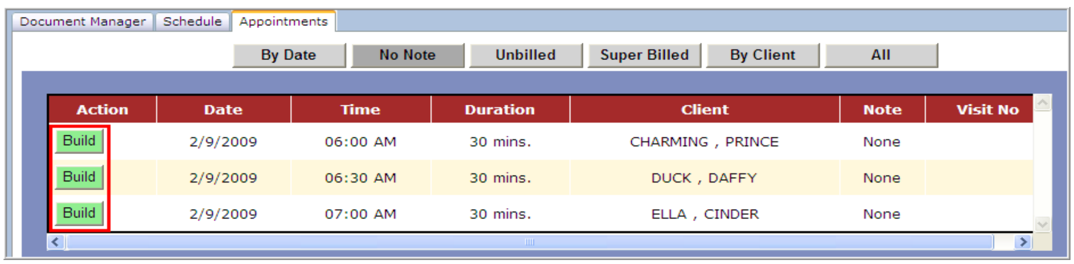
Step 1. CREATING THE NOTE: Open a client file to the Document Manager, 1) select Add Note from the Documents tab of the toolbar, or 2) use the 'Build' designation from the Appointments view function after you hae scheduled an appointment.

1



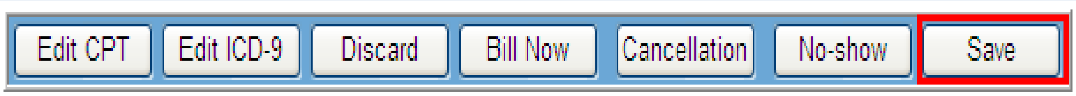
Toolbar

2

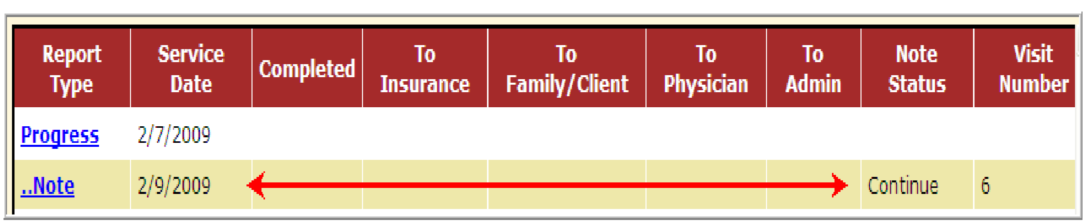


View Appointments

Step 2. SAVE THE NOTE: After you create a note you need to select 'Save' from the top of the note to put the note in each client's file.

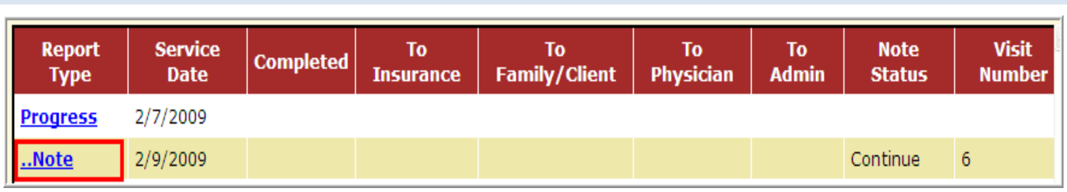


A saved note registers as 'Continued' on the Document Manager and the Appointments calendar.



Step 3. EDIT THE NOTE: Click on 'Note' from the Document Manager or 'View' from the Appointments calendar to recall and edit the note..

1



Document Manager

Creating Daily Treatment Notes

2

Action	Date	Time	Duration	Client	Note	Visit No
View	2/9/2009	06:00 AM	30 mins.	CHARMING , PRINCE	Continue	6
View	2/9/2009	06:30 AM	30 mins.	DUCK , DAFFY	Continue	5
Build	2/9/2009	07:00 AM	30 mins.	ELLA , CINDER	None	

View Appointments

Step 4. Use the SOAP note format. You may copy and paste from any Word document into Treat*Write*. Helpful information about writing SOAP notes is located in the Online Help from the Help Menu of the toolbar.

Step 5. Select 'Bill Now' to finalize or freeze the note contents in preparation for invoicing and for creating a subsequent note. Bill Now notes register as Super Bill on the Document Manager. Each subsequent note will be a copy of the previous note.

Edit CPT | Edit ICD-9 | Discard | Bill Now | Cancellation | No-show | Save

Report Type	Service Date	Completed	To Insurance	To Family/Client	To Physician	To Admin	Note Status	Visit Number
Evaluation	12/8/2008							
..Note	2/3/2009						Super Bill	2

Document Manager after Bill Now

Discarding Notes

DISCARDING NOTES: Select 'Discard' from the top of the daily note. You may not discard a super billed note, or discard a note from the appointments calendar.

Edit CPT | Edit ICD-9 | Discard | Bill Now | Cancellation | No-show | Save

Cancellations and No Shows

CANCELLATIONS AND NO SHOWS: Select the appropriate designation from the top of the daily note. Your selection will register on that client's Document Manager.

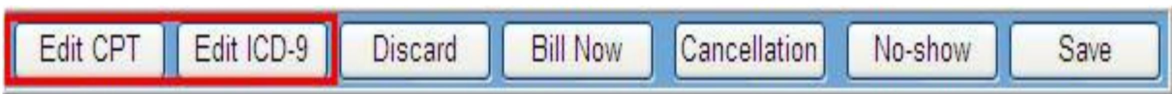
Edit CPT | Edit ICD-9 | Discard | Bill Now | Cancellation | No-show | Save

Creating Daily Treatment Notes

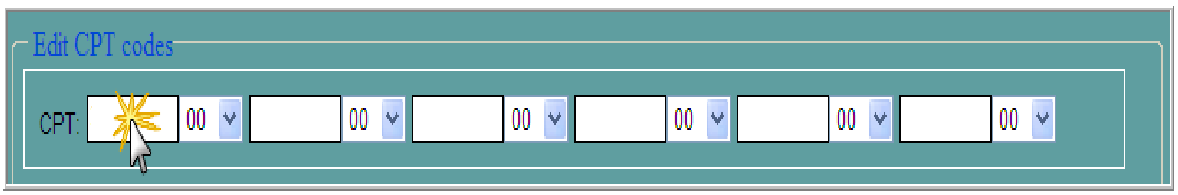
Changing CPT and ICD9 Codes

CHANGING CPT AND ICD9 CODES: 1) Select the type of code you want to change, 2) click in the desired edit boxes, 3) add or remove codes from the coding page, say Add, then OK or Cancel to return to the code edit view, 4) Select OK to place the code changes on the note, and then Close the code edit box.

1



2



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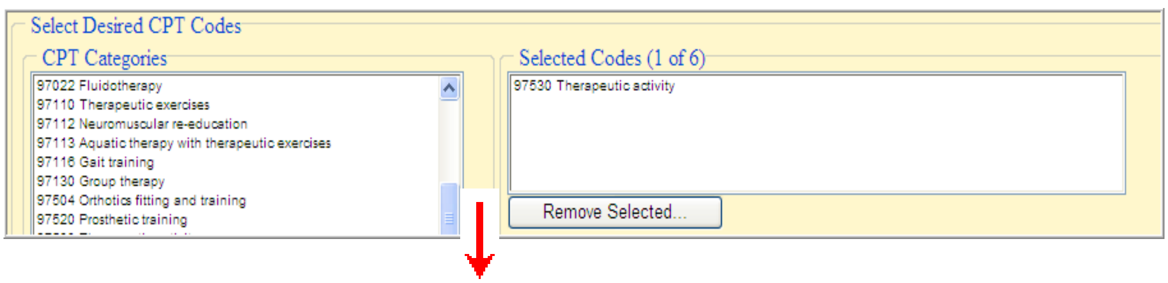
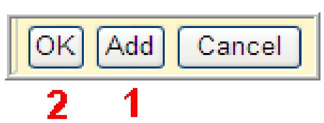
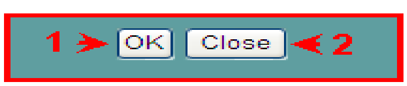


4





More helpful information about creating daily notes is located in the Online Help and in the Treat*Write* Manual located on the Help Menu of the toolbar.