

The following information shows you how to enter patients into TreatWrite.

**Step 1. CREATE A NEW PATIENT RECORD:** Select the desired report type from Add a New Patient on the homepage.

[Speech Therapy](#)

[Occupational Therapy](#)

[Physical Therapy](#)

**Step 2. ENTER BASIC INFORMATION:** Enter information fields populating the daily treatment notes from the Patient Tab.

Enter the following:

- Patient name (Last, First)
- DOB (MM/DD/YYYY)
- Age (click in the box)

**Step 3. SAVE:** Select Save from the Quick Click's box in the upper right hand corner of the window.

**Step 4. AUTHORIZE VISITS:** The first time you save a client record the Authorizations Box pops up. Enter the number of visits in the client's Care Plan. Don't know? Enter 20 visits in the ending visit date and any known date range information. Use 999 for privately paying clients. Then click '**Calculate**' and then '**Authorize**'. You may adjust this information any time from the Business Activities section of the toolbar.

**Step 5. DOCUMENT MANAGER CONFIRMATION:** You will see the Document Manager after you select 'Authorize' from the Authorization box. This confirms you have successfully entered your client into TreatWrite.

Report Type	Service Date	Completed	To Insurance	To Family/Client	To Physician	To Admin	Note Status	Visit Number
Evaluation	7/30/2008							

**Step 6. FIND YOUR CLIENT:** Client files are available from the Find Patient Menu of the toolbar, and from My Patients on the homepage.

**Step 7. COMPLETING DATA FIELDS THAT APPEAR ON NOTES:** Click on the blue word "Evaluation" to open the document and enter the following onto the appropriate fields in the Patient Data tab. Use NA if the field does not apply.

- Insurance company
- Group #
- Subscriber ID (SID) or SS#
- CPT code(s)
- ICD code(s)

**Step 8. ADD REFERRAL SOURCE NAME:** Click on the Speech, OT, or PT tab and enter the following:

- Referral source

**Step 9. SAVE NEW INFORMATION:** Select Save from the Quick Click's box in the upper right hand corner of the window.