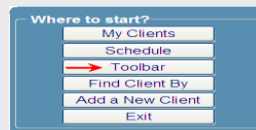


LOCATING BRANCH LEVEL PATIENT RECORDS

STEP 1 Enter your system via your personal logon information

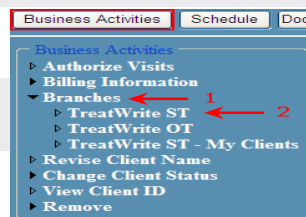
STEP 2 Select Toolbar from the Homepage



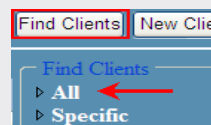
STEPS 3 - 5 Click on Business Activities on the TreatWrite Dashboard/Toolbar

Select the Branches option

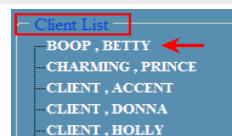
Click on the Main Branch title from the listed options



STEP 6 Locate the Find Client tab on the Dashboard: <Select All>



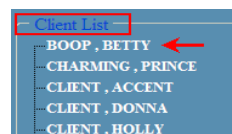
STEP 7 Locate the Branch Level patient file list



OWNING RECORDS AS A SUPERVISOR (Must be done before assigning to a student/assistant)

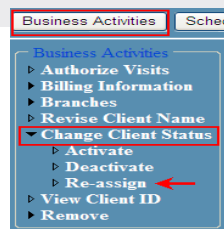
STEP 1 Follow the above instructions to Locate Branch Level Patient Records

STEP 2 Select the desired record from the Branch level list of company/university patient files

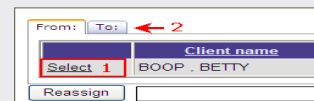


STEPS 3 & 4 While looking at the selected file Document Manager, select Business Activities from the Toolbar

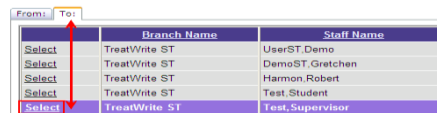
Select 'Change Client Status': <Reassign>



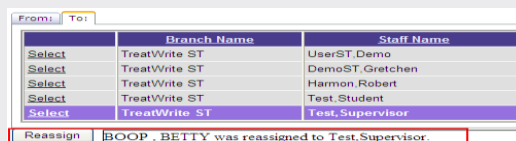
STEP 5 Click on 'Select' and the 'To'



STEP 6 Click on your name



STEP 7 Review the new records assignment selection listed at the bottom of the popup window.

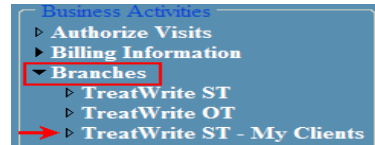


STEP 8 Repeat steps in this section for each patient record

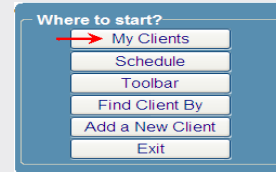


ASSIGNING RECORDS TO YOUR STUDENTS (Supervisor must 'own' the record)

STEP 1a Return to your personal files by selecting My Clients from the Branches menu



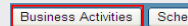
STEP 1b Enter your system via your personal logon information: 'My Clients'



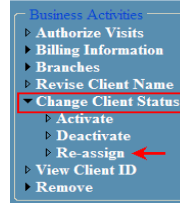
STEP 3 Select the file you wish to assign to a student



STEP 4 While looking at the selected file Document Manager, select Business Activities from the Toolbar



STEP 5 Select 'Change Client Status': <Reassign>

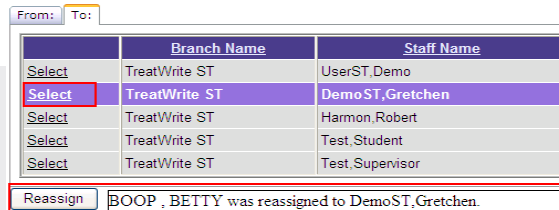


STEP 6 Click on 'Select' and the 'To'



STEPS 7 & 8 Click on the student's/assistant's name

Review the new records assignment selection



STEP 9 Repeat steps in this section for each record assigned to a student

- NOTES:
- 1) Records will reflect the signature of the assigning supervisor.
 - 2) Supervisor assignments may be changed anytime by following the above procedures.