TreatWrite®

QUICK REFERENCE

MANAGING CLIENT RECORDS

Adding a New Client	Home: <Add a New Patient> OR Toolbar:<New Patient> <Add Evaluation Report> <Select report type>
Coding	Patient Data: <Click in CPT / ICD9 code box> <Select code(s)> <Add> <OK>
Adding Tests from Menu	Tests Administered: <Menu> <Check to select> <Add> <OK>
Adding Non-menu Tests	Tests Administered: <Type test on blank line>
Adding Lines for More Tests	< + >
Deleting Tests and Lines	Check box next to delete item. Select < - >
Clinical Progress Tracker Menu	Clinical Progress Tracker: <Menu> <Check to select function> <Add> <OK>
Adding Non-menu Functions	Clinical Progress Tracker <Type function on blank line>
Adding Lines for More Tests	< + >
Deleting Functions and Lines	Check box next to delete item. Select < - >
Legend	<Select severity rating radial button for desired 5 or 7 point scale>
Finalizing Reports	Client Document Manager: <Open report (complete all fields)> <Documents> <Finalize>
Adding a Progress Report	Client Document Manager: (Finalize previous report): <Documents> <Add Report> <Progress>
Adding a Discharge Summary	Client Document Manager: (Finalize previous report): <Documents> <Add Report> <Discharge>

APPOINTMENTS and NOTES

Adding Appointments	Schedule <Calendar> <Select patient name> <Select date> <Select time range> <Add>
Viewing Appointments	Schedule <View appointments> <Select view option> OR Calendar <View> <Select view option>
Building a Daily Note	Schedule OR Calendar <View appointments> <Select view option> <Client name> <Build>
Adding a Daily Note	Document Manager / Toolbar: <Doucments> <Add note>
Group Appointments	Schedule: <Calendar> <Select client name> <Select date> <Select time range> <Add> <Repeat>

TRACKING DOCUMENTS

Document Manager	Home: My Patients OR Find Patients Menu: <Click on patient name>

SAVING RECORDS

Saving Client Reports	Quick Clicks / File Menu: <Save>
Saving Daily Notes	Open Note: <Save button on note page> (Do not use Quick Clicks)
Saving Templates	Open Template: <Templates> <Save new template> OR <Update template>

BILLING

Bill from Daily Note	Open Note: <Save> <Bill Now>
View Billing Summary	Toolbar-Business Activities: <Billing Information> < Select billng summary> <Select date>
Exporting Billing Summary	Locate the export key: <Select export type> <Enter>
Printing Billing Summary	Locate print icon and click
Emailing Billing Summary	Daily Invoice: <Email tab> <Supply address and information as needed> <Send>

TRANSMITTING RECORDS

Printing Documents (Windows)	Open document: <File> <Print/Send> <Select document> <Browser file> <Print preview> <Print>
Printing Documents (Macintosh)	Open document: <File> <Print/Send> <Select document> <Browser file> <PDF> <Mail PDF>
Emailing Documents	Open document: <File> <Print/Send> <Select document> <Send to> <Gmail>

TEMPLATES

Create from Blank Template	Templates: <Create Blank> <Yes>
Create from Client Record	Open Patient Evaluation Report: <Templates> <Create from patient> <Name template> <Save new template>
Editing Templates	Toolbar-Templates: <Open templates for editing> <Select template (make edits)> <Update template>
Removing Templates	Toolbar-Templates: <Open templates for editing> <Select template> <Remove current template>

ASSIGNING RECORDS

Re-assign (Send)	Client file: <Business Activities> <Change patient status> <Reassign> <Select> <To> <Select> <Reassign>
Re-assign (Take)	Business Activities:<Branch> <Select branch> <Find patients> <All> <Select patient> <Business Activities>
Re-assign (Take, con't.)	<Change patient status> <Reassign> <Select> <To> <Select> <Reassign> <Branch> <My Branch> <Find clients>

BUSINESS ACTIVITIES

Authorizing Visits	First Evaluation Save: <Enter # visits authorized> <Enter authorization dates>
Deactivate Clients	Open Patient File: <Business Activities> <Change patient status> <Deactivate>
Reinstate Clients	Find Patients: <Inactive> <Select client> <Business Activities> <Change patient status> <Re-activate>
Removing Record	Inactive Patient File> <Select patient> <Business Activities> <Remove record>
Removing Report	Open Patient File: <Open report> <Business Activities> <Remove report>
View Client ID	Open Patient File: <Business Activities> <View client ID>