

## **What to do in TheraNest: High Overview**

Do 3 things every time you see a client:

- 1) Schedule a new appointment
- 2) Write a progress note
- 3) Charge the client & take payment

### **Schedule a new appointment**

- 1) Make sure their name pulls up from TheraNest
- 2) Make sure the service type is correct
- 3) Make sure the day/time is correct

### **Write a progress note**

- 1) Connect the note to the appointment
- 2) Write with BIRP format in mind
- 3) Save and Sign

### **Charge the client & take payment**

- 1) Create a New Invoice (within the ledger)
- 2) Save and accept payment
- 3) Email to (or print for) the client