

## TheraNest Orientation

TheraNest is our Electronic Health Records (EHR) system. On this system, we:

- Store client information
- Schedule appointments
- Write progress notes (and keep all documentation)
- Charge clients and accept payments

### **Store Client Information**

- Most information will be entered by the client when they sign up for the portal.
- “Details” Tab has
  - Address & Contact info – VERY IMPORTANT
  - Check the Consent for Communications form to make sure we have their permission to contact them. If not, check the boxes on the right side as necessary.
  - “Set Payment Amount” field (left side) – should have your fee
  - Demographic Info - especially birthday & gender (do not enter a SSN)
  - Please choose the referral source
    - If the person/entity who referred the client is not listed, please email the referral source to Jessie and she will enter it.
- “Bill to/Insurance” Tab
  - Bill To address (if different from their usual address)
  - This is where you add/delete credit card numbers
- To enter a diagnosis code: Once in a client’s “file”
  - Go to “Notes” (between top icons and tabs)
  - Use “Initial Assessment & diagnostic codes”

### **Schedule appointments**

- Double click on the calendar, then enter:
  - Their name (it will come up as you type it)
  - Choose the service type (almost always Individual therapy 45 minutes or Family Therapy)
  - Choose the date & time
  - Room number
  - Save

### **Write Progress Note**

Choose the “Notes” tab, choose the Progress Notes tab

- Go to the “Appointment” field on the left and choose the correct appointment. (The service date must be the same date as the appointment or it will not come up in the menu.)
- You may choose to fill out the “mental status” fields, but they are not necessary.
- Only fill out the Risk Assessment section if it is salient. If there is risk, be thorough.
- See Progress Notes Cheat Sheet to learn how to fill out the rest of the note.
- Click Save & Sign, then sign the document.

## TheraNest Orientation

### **Charge Client & Accept Payment**

Anything related to money in TheraNest is handled in the client's "Ledger" tab.

- First, click "Create New Invoice" to tell TheraNest that we want to bill the client.
  - If all is correct, the correct date of service will show up in a blue hyperlink.
  - **Do not add an invoice item.**
  - Verify the date of service and total amount
- Second, choose "Save & Accept Payment" to tell TheraNest that we are receiving payment.
  - Verify payment amount
  - Choose payment method (Cash, check or credit/debit card)
  - Then press save
- Third, give or email the client the invoice
  - Choose the "Fully Paid Invoices" tab
  - On the date of service you just accepted payment on, choose "Select an Action"
  - Choose "Email to Client"  
OR- if your client did not opt in to receive invoices via email – print it and give it to them.  
OR – if your client wants to submit it to insurance, choose "Email Superbill to Client"

*\*When you accept Cash or Checks (and after you enter the payment into TheraNest), please fill out the Cash/Check tag (located in the workroom drawer), paperclip it to the payment and place the cash/check and tag in the money box.*

To enter Credit Card information:

After you've chosen to accept payment, choose Credit Card as the payment option.

- A blue link appears that says: Enter Card Details
  - Enter name on card, CC number, Expiration date, and billing zip code
  - Click "Save payment details for later use."
  - Then enter the CVC.
  - Click save.

### **Check to make sure all 3 things are connected**

Every appointment should have an invoice and a progress note attached to it. Double check that you've completed and attached all 3 things by looking on the calendar. A session block should show a little paper symbol (indicating an attached progress note) and a green circle with the word "Billed" (indicating an attached invoice).

## TheraNest Orientation

### Therapy Groups

- For TheraNest training on how to use the Group Client features, view this video <https://www.youtube.com/watch?v=LRFeogbX1aU>

### Setting up your TheraNest Calendar

- Look at the top right of the TheraNest screen (just to the left of Log Out). Click your name and choose “Calendar Preferences”
- Under General Preferences, choose
  - Email me when someone else changes my schedule
  - Show only client initials in Calendar and staff email alerts
  - Show only client initials in synced calendars (Google, iCal, etc.)
- You can Sync with a calendar that you choose.
- Under Calendar Appearance Preferences, adjust ordering of therapists in calendar view, and to change “start” and “stop” hours.
- Adjust filters (location, service types, staff)
  - Limit staff to just therapists
  - Select *every* service type
  - Click “Apply & Save Filters” (or be frustrated)