THERAPIST ONBOARDING

We're excited that you've chosen to partner with us to optimize and streamline your daily work. Once your Organization Administrator has done all the background AccuPoint setup, you can begin to utilize AccuPoint with your everyday workflow!

NOTE: The checklist and links match the checklist found here.

Start Here!

- [ ] Watch AccuPoint Triangle Video

Agenda, Calendar & Appointments

- [ ] Set your Calendar Availability
- [ ] Set Calendar Appearance & Preferences
- [ ] Scheduling Navigation & Filters
- [ ] Schedule Appointments
  - [ ] Client Appointments
  - [ ] Recurring Appointments
  - [ ] Group Appointments
  - [ ] Telehealth Appointments

Notes

- [ ] Case & Notes Overview
- [ ] Create Notes - Sign a Note, Edit a Note
- [ ] Add a Client Diagnosis
- [ ] Add a Treatment Plan
- [ ] Supervise & Review Notes

Client Billing

- [ ] Add Client Insurance to Client Profile
- [ ] Create Client Invoice
- [ ] Accept a Client Payment (Cash or Check)
- [ ] Accept Insurance Payment
- [ ] Accept Credit Card Payment (if subscribed)

AccuPoint & Catalyst Integration

- [ ] Catalyst Integration Overview

Client Portal

- [ ] Client Portal Overview
- [ ] Invite Clients to Client Portal
- [ ] Setup your Client Portal Notifications
- [ ] Utilize Client Portal Intake Forms
- [ ] Utilize Secure Messaging in Client Portal
- [ ] Utilize Client Portal Self-Schedule
- [ ] Learn about Client Portal from Client's side

Telehealth

- [ ] Learn about Telehealth Workflow
- [ ] Learn about Telehealth from Client's side