Therapy Brands

<table>
<tr><th colspan="3">TheraNest Calendar and Agenda– Feature Guide</th></tr>
<tr><th>Summary:</th><th>Details:</th><th>Educational Links:</th></tr>
<tr><td>Calendar/Agenda Introduction</td><td>Your Agenda keeps your day on track and is your primary location for adding progress notes and creating invoices. This ensures that the client, appointment, place of service, and invoice are aligned and connected for your complete and compliant EHR.

When you login into TheraNest your agenda is the first page you see.
Keeps you on track and is the primary location for adding progress notes and creating invoices.
</td><td>Agenda & Calendar Tabs</td></tr>
<tr><td>Setting Up Your Calendar Preferences and Availability</td><td>Set up your Calendar and Availability by clicking on your name in the top right corner.

Every staff member should set their own preferences and availability. Calendar Availability is when appointments can be scheduled. Times you are unavailable will be greyed out.
Preferences allows staff to customize how they see their calendar
Personalize your Agenda view with filters

Therapists should filter to their specific name.
Billers and Administrative staff may want to see all staff.
Supervisory review users may want to see the staff they supervise as well as their own clients.

Client contact cards provide quick access to contact details and messaging and balance information
Client Flags – NEW FEATURE
Prominent text and phone reminder statuses
Quickly see missing progress notes and invoices at a glance
</td><td>Configure your Calendar

Show Client Initials on Calendar & Alerts

Prevent Double Bookings

Client Flags

Sync TheraNest Calendar to Google Calendar

Sync TheraNest to Apple Calendar</td></tr>
<tr><td>Recommended/Best Practice Workflow</td><td>Clicking the “New Appointment” link from the Agenda will take you to the Calendar: Creating appointments begins in the Calendar. Once your practice information, location settings, place of service, service type and client details have been created, you will use the scheduling functions within the calendar to create client appointments.

By creating an appointment, progress notes, and invoice from the Agenda this will ensure all information is linked and connected to your client’s complete EHR

Creating an appointment via agenda

Click the green plus calendar icon (this will take you to the calendar to schedule.)

Add a progress note via agenda - When you create your Progress Note from the Appointment on the Agenda (linked to the Appointment), the appointment information will pull into the Progress Note.

Navigate to appropriate day and client appointment
Click “add progress note” button on right side
Ability to select the Standard Form, Soap Note, or a previously created Dynamic Progress Note

Create an invoice via the agenda - When the Invoice and Progress Note are linked to the same Appointment the DX will show on the Superbill properly.
</td><td>Link Progress Notes with Calendar Appointment

Configure your Calendar

Create a Progress Note

Create an Invoice</td></tr>
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	◦ Navigate to appropriate date and appointment ◦ Click "Add Invoice" button on right side	
Creating/Scheduling an Appointment	Create an Appointment: • Create an appointment from the Calendar or the Agenda by clicking the green plus calendar icon. ◦ Enter Client name - **click the client name that results in the search field; this is necessary to link the appointment to the Client's file** ◦ Select service type, staff member, location, date and time are required to schedule. • Appointment Variations ◦ Schedule with multiple service types ◦ Schedule Multi-Staff Appointments ◦ Schedule All Day/Multi day appointments ◦ All day or multi-day ◦ Non-Client Event • Schedule Recurring Appointments • Schedule a Group Appointment • Delete Single or Recurring Appointments	Schedule an Appointment Create a Non-Client Event Schedule Recurring Appointment Convert Appointment to a Telehealth Appointment Schedule a Group Appointment Manage Appointments
Appointment Reminders	Automatic Appointment Reminders are an Organization wide setting. • Can be set up by Clicking Organization > Appointment Reminders ◦ Enter Organization Name ◦ Reminders Schedule ◦ Callback Number • Edit Reminder Message- Placeholder Information in the appointment reminders are pulled directly from the calendar appointment. • Email Reminders- *included in subscription* • Phone Reminders – *additional nominal fee* • Text Reminders – *additional nominal fee*	Automatic Appointment Reminders Overview Setup Email Appointment Reminders Setup Phone Appointment Reminders Setup Text Appointment Reminders Enable Text Reminder Response Notifications
Summary	• To use TheraNest successfully, we suggest utilizing all of the parts and pieces of TheraNest. The three main parts are the Calendar, Billing, and Notes. • When the Invoice and Progress Note are linked to the same Appointment information can move freely between the two. • You can always look at your Calendar to see if your Appointment has a Note and an Invoice icon, indicating they are linked to the Appointment.	