

# How to use the Transfer to Progress Notes Option in Scheduler Quick Guide

If your organization has a subscription to Scheduler and Progress Notes you will be able to set up a connection between them for faster note-taking. This is available for both individual and group notes. The following steps will guide through the process.

## Step 1. A Clinician creates an appointment in Scheduler

**New Appointment**

Staff\*: John B. Trainer

Facilitator\*: John B. Trainer

Clients: Able, Anna

New Client Clear List Add From Group

Max Attendance: 1

Template: Narrative/Non-DUI Evaluation

Session Type: Narrative/Non-DUI Evaluation

Location: (AOBH) Orion Behavioral Health

Event\*: Narrative/Non-DUI Evaluation

Start Time\*: 10/05/2020 9:00 AM 7 min 45 min 90 min

End Time\*: 10/05/2020 11:00 AM 15 min 60 min 120 min 30 min 75 min

Color:  

Transfer

Transfer To Billing  Transfer To Progress Notes

Recurrence

Recurrence

Daily Recur every 1 week(s) on

Weekly  Sunday  Monday  Tuesday

Monthly  Wednesday  Thursday  Friday

Yearly  Saturday

No end date  End after 6 occurrences  End by 10/28/2020

Save Cancel

It is important to check this box {Transfer to Progress Notes} to ensure the appointment transfers a notice to the Progress Note module

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**Step 2.** Upon completion of the appointment the client is checked-in by the clinician. Please ensure only the Transfer to Progress Notes has been checked. To check-in, the appointment click the red check icon.



- 1) Click [Check-in] button
- 2) Verify the Check-In List then [Save]

Appointment Check-In

Client Check In

Select Client:

Select Check In Status:

Attended

No Show

Canceled

Confirmed

Left Message

Office Canceled

Rescheduled

Check In

Appointment Details

Event: Narrative/Non-DUI Evaluation

Session Type: Narrative/Non-DUI Evaluation

Start: 10/05/2020 09:00 AM

End: 10/05/2020 11:00 AM

Facilitator: John B. Trainer

Location of Service: (AOBH) Orion Behavioral Health

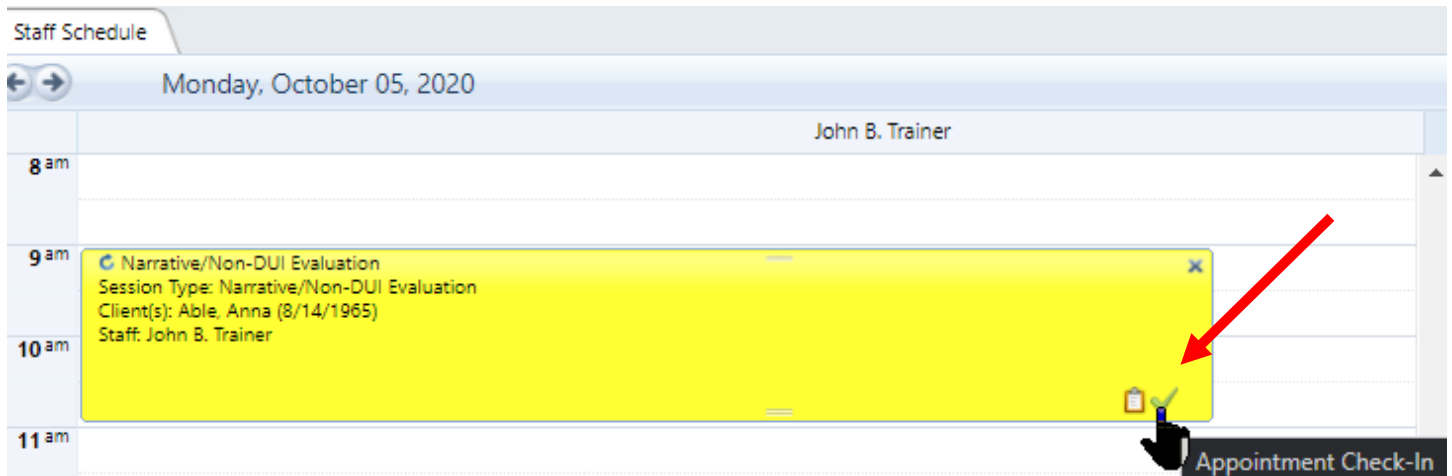
Check-In List

Client Name	Check In Status	Transfer to Billing	Transfer to Progress Notes	Comments	Delete
Able, Anna	Attended	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

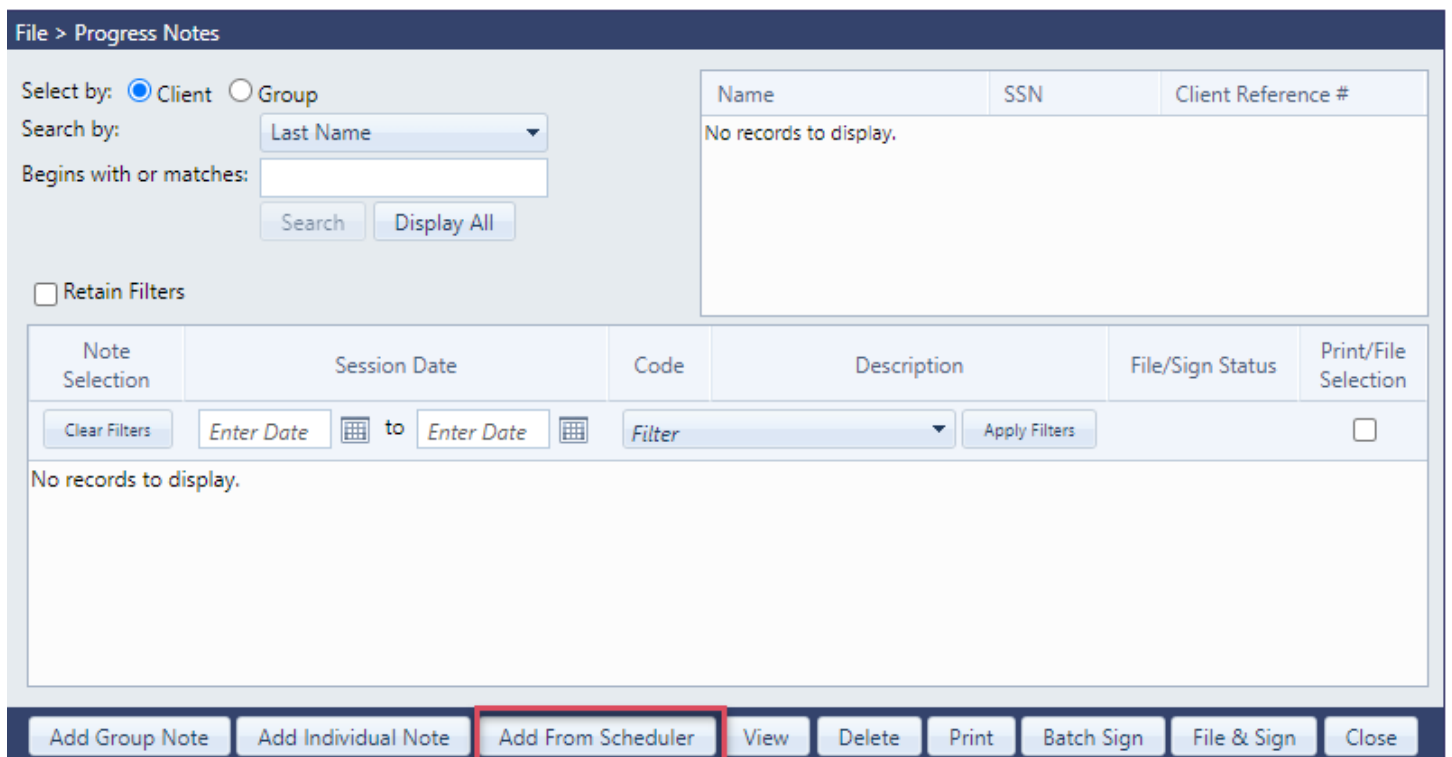
Print Attendance Sheet Save Cancel

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Verification of a green check shows the appointment has been checked in



**Step 3.** Upon opening the Progress Notes click the [Add from Scheduler]. This will give you a list of all the clients you created appointments and checked in.



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**Step 4.** When you are ready create notes select the client or clients click the [Next] button

File > Progress Notes > Appointment Transfer

Appointment Filters

To filter the appointment list below, please add one or more filters via the button on the right.

Set Filters

Clear Filters

Select Check-Ins (Click headers to sort)

Client Name	SSN	Client Reference #	Note Created	
Date: 10/05/2020, 9:00 AM Session Type: Narrative/Non-DUI Evaluation Event: Narrative/Non-DUI Evaluation				
Status: Attended				
Able, Anna	***_**_**22	AA19659222	No	<input checked="" type="checkbox"/>

Remove from List Cancel Next >

**Step 5.** The top portion of the Progress Note will auto-fill with data brought over from the checked-in appointment. All you would need to do type in the note then decided to [Save and Close] or [Save and Sign Off].

File > Progress Notes > Add Note

Note Info

Client: Able, Anna Level of Care: - Level II.1 - Co-occurring intensive outpatient

Clinician: John B. Trainer Co-Facilitator:

Session Type: 205 - Narrative/Non-DUI Evaluation  Sort by Description

Session Date: 10/05/2020  Time: Start: 9:00 AM to End: 11:00 AM Duration: 2:00

Diagnosis:

Note:

TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note

TEST Note TEST Note

TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note TEST Note

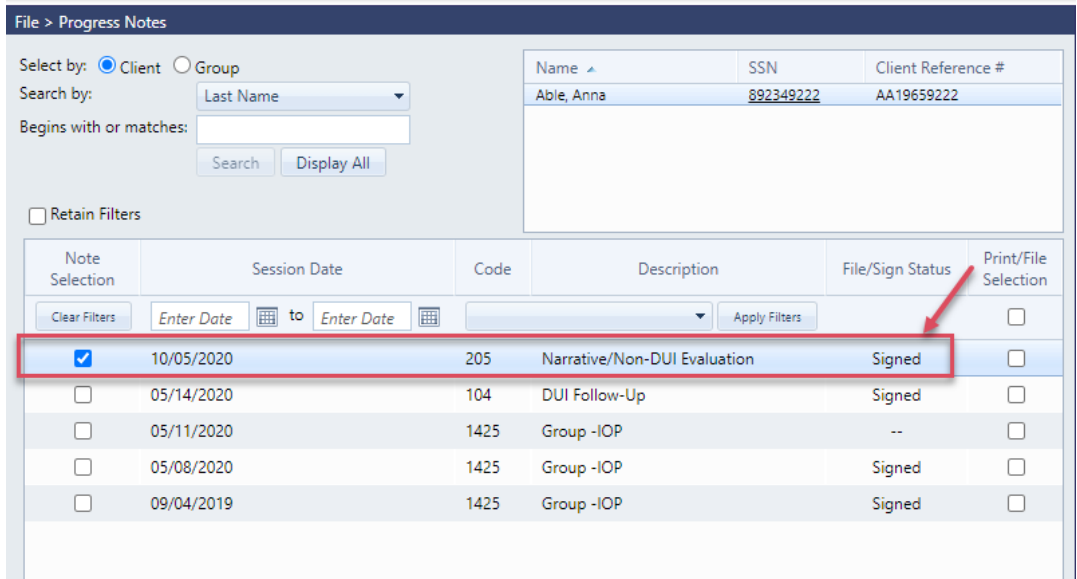
TEST Note TEST Note

< Back Statements Save and Sign Off Save and Close Save and Back to List Cancel

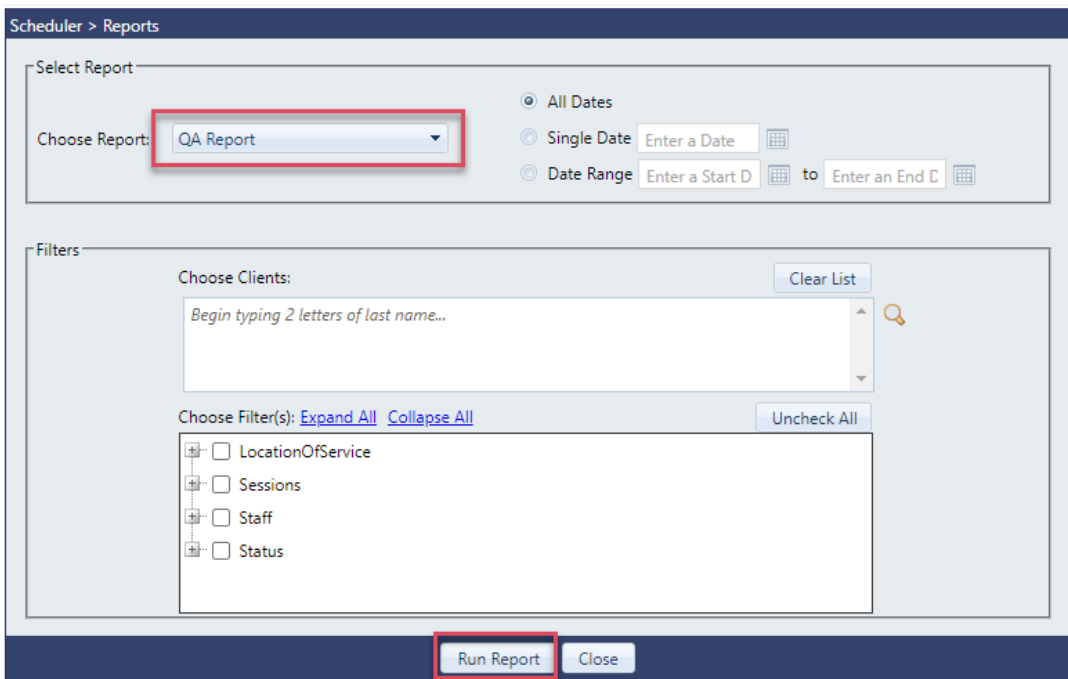
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## If you bill for services this will also help your biller create Quality Assurance Documentation/Billing Report

**Billing Benefit #1** – When the clinician follows these steps above then the biller will see a confirmed list Progress Note signed off by clinicians in Billing Transfer.



**Billing Benefit #2** – When the biller runs the Scheduler QA Report, selects a clinician then clicks the [Run Report] button they will see a report where it shows each client’s status and transfer Progress Note completed by that clinician.



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## Quality Assurance Documentation/Billing Report All Dates

10/28/2020

Date Attended	Type of Session	Facilitator	Location of Service	Client	Client Ref #	Status	Transferred To		Claim Submitted
							Progress Note	Billing	
11/08/2018	DUI Evaluation	Ron S Admin	(AOBH) Orion Behavioral	Doe, Jane	N/A	Attended	Complete	Incomplete	N
01/18/2019	Mental Health Individual Counseling/Therapy	Ron S Admin	(AOBH) Orion Behavioral	Appleseed, Johnny	<u>2342343223</u>	Attended	Incomplete	Incomplete	N
01/18/2019	Mental Health Individual Counseling/Therapy	Ron S Admin	(AOBH) Orion Behavioral	Doe, Jane	N/A	Attended	Incomplete	Incomplete	N
01/18/2019	Mental Health Individual Counseling/Therapy	Ron S Admin	(AOBH) Orion Behavioral	Griffith, Laurie	N/A	Attended	Incomplete	Incomplete	N
	DUI Follow-Up	Ron S Admin	(AOBH) Orion Behavioral	Lare, Rose	PL19792121	Attended	Incomplete	Incomplete	N
04/22/2019	Counseling	Ron S Admin	(AOBH) Orion Behavioral	Tally, Sally	N/A	Attended	Complete	Incomplete	N
04/22/2019	Mental Health Individual Counseling/Therapy	Ron S Admin	(AOBH) Orion Behavioral	Tally, Sally	N/A	Attended	Complete	Incomplete	N
02/18/2020	Mental Health Individual Counseling/Therapy	Roy Able, BS, CADC	(AOBH) Orion Behavioral	Able, Anna	AA19659222	Attended	Incomplete	Incomplete	N
02/18/2020	Mental Health Individual Counseling/Therapy	Roy Able, BS, CADC	(AOBH) Orion Behavioral	Jones, Jack	JJ19872224	Attended	Incomplete	Incomplete	N
02/18/2020	Mental Health Individual Counseling/Therapy	Roy Able, BS, CADC	(AOBH) Orion Behavioral	Young, Jane	JY19872418	No Show	Incomplete	Incomplete	N
10/05/2020	Narrative/Non-DUI Evaluation	John B. Trainer	(AOBH) Orion Behavioral	Able, Anna	AA19659222	Attended	Complete	Incomplete	N

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For additional questions, contact AccuCare Support at 800-324-7966 or email [support@orionhealthcare.com](mailto:support@orionhealthcare.com) and we will be happy to assist you!