



CALIFORNIA THERAPY SERVICES

THERAPY SYNC AGENCY INSTRUCTIONS

Therapy Sync is extremely easy to use for both therapists and agencies! This is a 3-page guide highlighting the key features of the software and what you can expect to see. You will have full access to all notes (with patient fsignature), communication reports, MD orders, and patient's schedules. Printing notes could not be easier and is detailed in the following instructions.

HOME PAGE

The screenshot displays the Therapy Sync Agency Home page. The top navigation bar includes a 'Print Note' icon (highlighted with a red box), 'Mail', and 'Support' icons, along with the user profile 'John Doe, Agency Staff'. The left sidebar contains a menu with 'TEST AGENCY', 'HOME', 'PRINT NOTE' (highlighted with a red box and a '9' notification), 'REFERRALS', 'PATIENTS', 'MAIL', 'INVOICES', 'AGENCY MANAGEMENT', and 'DOCUMENTS'. The main content area shows 'Test Agency Home' with a date/time of 'Feb 28 | 2:43 PM'. It features an 'ALERTS / REMINDERS' section with 'Shared Therapist Credentials' and a count of '14'. Below is a 'SCHEDULE (2/24 - 3/02)' section with a weekly view calendar showing 'No Times Scheduled' for 'Sample Patient Standard in Los Angeles'. A 'SEND REFERRAL' button and a 'PRINT NOTES' button (with a red box) are visible. At the bottom, there is a 'PATIENTS' section with a dropdown menu and a 'RETRIEVE' button, and a 'DID YOU KNOW?' section with a note about note status.

Schedule: Use either the daily or weekly view to see all scheduled patient visits.

Do not use Send Referral. We handle that for you! Simply send us the requested information from the Referral Instructions form and we enter all referrals.

Patients: Click this to search for both active and inactive patient's charts.

Print Notes: Simply click one of the Print Notes buttons and it will bring you to the Print Queue page.

Shared Therapist Credentials: Simply click and it will bring you to the Credential Sharing Page.

PRINT QUEUE PAGE

CALIFORNIA THERAPY SERVICES

Print Note (14) | Mail | Support | John Doe Agency Staff

Print Queue

Sep 26 | 5:32 PM

[Back to Tools/Reports](#)

Use the search options to print paperwork for agencies. After pulling the desired documentation, hit the Print All button. The documentation will pop-up in a new windows for you to print.
(must have pop-up blocker turned off)

To print notes that were completed prior to migrations use this link: [Go To Archive](#)

PATIENT: -- All Patients --

Show Inactive Patients

DATE RANGE: 09/19/2018 to 09/26/2018

PRINTED STATUS: Non-Printed Only Printed Only Both

[VIEW NOTES](#)

IMPORTANT: Once you have hit "Print All", all notes will be updated to printed

Search: Mark notes as printed [PRINT ALL](#) [PRINT PDF](#)

Date	Patient	Therapist	Paperwork Type		Print Note
9/11/2018	Patient, Sample	PT, Sample (PT)	Therapy Order	VIEW	PRINT
8/1/2018	Patient, Sample	PT, Sample (PT)	Communication Report	VIEW	PRINT
6/22/2018	Patient, Sample	PT, Sample (PT)	Communication Report	VIEW	PRINT
4/12/2018	Patient, Sample	PTA, Sample (PTA)	Communication Report	VIEW	PRINT

View: Click this button to view the paperwork.

Print All: Click this button and it will print all unprinted notes. Once the notes print they will disappear from the print queue.

PATIENTS PAGE

TEST AGENCY

All Patients Sep 26 | 5:38 PM

From here you can view all active and inactive patients for your current agency branch.
[Patient Improvement Report](#)

Displaying all Active patients from Test Agency

Search: Patient Status: Active Inactive Both

Patient ^	Agency ^	Address	City ^	State ^	Zip ^	Phone
Patient, Sample	Test Agency	1232323 Street	Los Angeles	CA	90025	(555) 555-5555
Patient, Sample	Test Agency	1234 Street	Los Angeles	CA	90025	(000) 000-0000

Previous 1 Next Show 25 entries
Showing 1 to 2 of 2 entries

Search: Simply type a few letters of the patient's name and they will populate. You may view both active and inactive patient charts.

SHARED CREDENTIALS

Shared Credentials

Mar 1 | 11:21 AM

[Back to Dashboard](#)

View all therapist credentials shared with your agency below. Each credential will only be available for viewing until the designated availability date.
(must have pop-up blocker turned off)

Therapist ^	Credential Type ^	Available Until ^	
Pevnick, Zach	Hepatitis B	3/7/2019	REMOVE
Pevnick, Zach	Resume	3/7/2019	REMOVE
Pevnick, Zach	Auto Insurance	3/7/2019	REMOVE
Pevnick, Zach	Abuse Reporting	3/7/2019	REMOVE
Pevnick, Zach	HIPAA	3/7/2019	REMOVE
Pevnick, Zach	Background Check	3/7/2019	REMOVE
Pevnick, Zach	Flu Vaccination	3/7/2019	REMOVE
Pevnick, Zach	Physical	3/7/2019	REMOVE
Pevnick, Zach	Competency	3/7/2019	REMOVE
Pevnick, Zach	Professional Liability Insurance	3/7/2019	REMOVE
Pevnick, Zach	Driver's License	3/7/2019	REMOVE
Pevnick, Zach	Professional License	3/1/2019	REMOVE
Pevnick, Zach	Tuberculosis	3/1/2019	REMOVE
Pevnick, Zach	CPR	3/1/2019	REMOVE

Credential Type:

Click this button to view the paperwork.

Available Until:

Each credential will only be available for viewing until the designated available date.

Remove:

Delete credential from dashboard.