# QUICK START GUIDE

# Treatment Board

## Discharge & Check Out

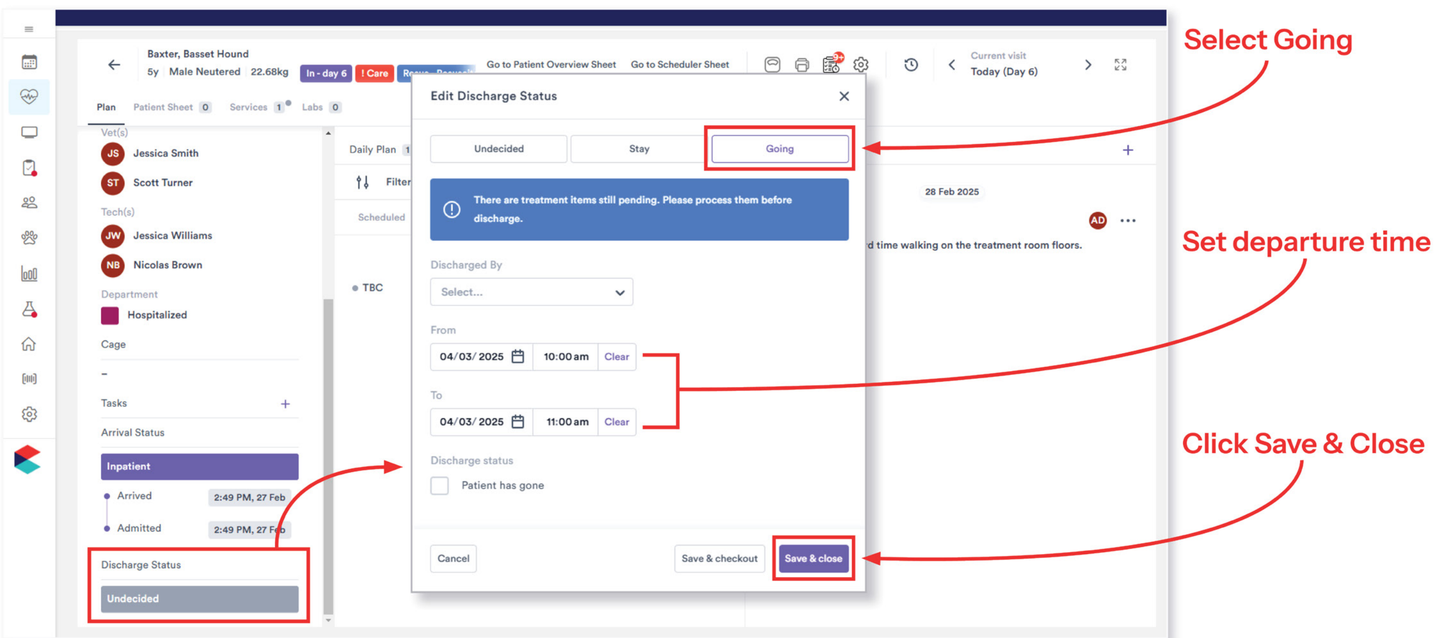
When a patient has completed treatment, they are ready to be discharged and then checked out from the Treatment Board. All completed services, labs, and medications will be added to client's invoice.

# Discharging the Patient

When all treatments have been administered to the patient, they are ready to be discharged. To prepare a patient for discharge:

- Review the patient plan and mark outstanding items as **Done** if they have been completed and need to be invoiced.
- Click the **Discharge Status** in the bottom left of the **Plan** details section.
- Select **Going** (*this will expand the discharge status)*.

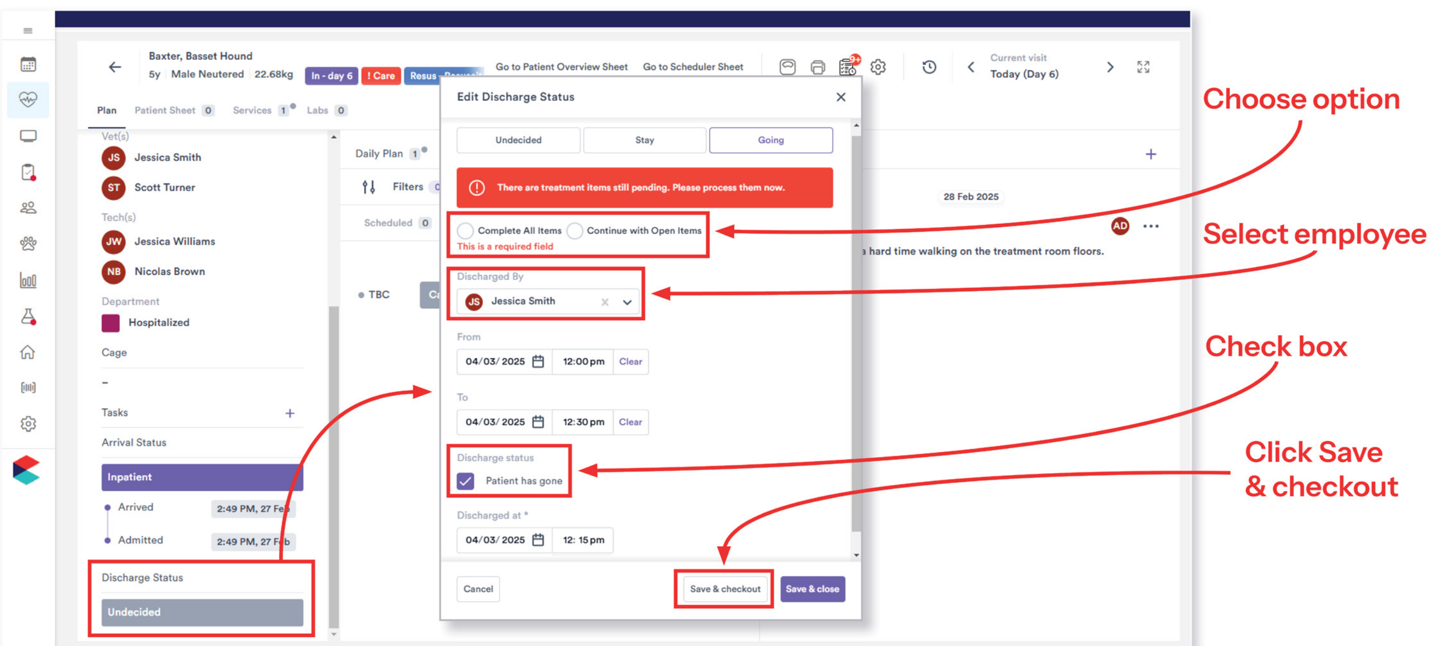
  *A banner will display if there are outstanding treatment items. Please process items prior to discharge.*
- Using the **From** and **To** fields, select the date and time range that the patient is **expected to be discharged**.
- Click Save & Close



# Checking the Patient Out

When the patient is ready to depart the practice, you can check them out.

- Click the **Discharge Status** in the bottom left of the **Plan** details section.
- Select the employee that is discharging the patient from the **Discharged By** drop-down menu.
- Check **Patient has gone**.
- If there are outstanding items, you will have two options:
  - **Complete All Items:** automatically mark incomplete items as **Done.** This will add items to the invoice.
  - **Continue with Open Items:** leave incomplete items open. This will not add items to the invoice.
- Select how you would like to proceed and Click Save & checkout




- Continue checking the client out.
  *Services, labs, and medications completed within the Treatment Board will be added to the invoice.*