



Welcome to ClinicNote!  
This onboarding guide is designed to help you get started.

Use the hyperlinked videos by holding “Ctrl” + clicking on the link with your mouse.

## Support

1. [Support Page](#)
  - ✓ These how-to videos include step by step written instructions.
  - ✓ Start here when you have a question.
  - ✓ **Each support page includes “important things to note”, read these!!!**
2. [Submit a Ticket](#)
  - ✓ This is the best way to reach ClinicNote.
  - ✓ **Include as much information as possible.** This will give us context to your question and allow us to help more effectively.
3. Emergency Situations: Call Anna at 563-650-8933.

## Getting Started

1. [Logging in for the first time](#) (3 min 1 sec)
  - ✓ Use Chrome browser ONLY.
2. [Change password](#) (29 sec)
  - ✓ 8-32 characters, include an alpha and numeric character.
3. [Create E-signature & Title](#) (1 min 9 sec)
  - ✓ Open ClinicNote on an iPad & sign using a stylus.

## Activity timer: [To continue working](#)

Following HIPAA regulations, after being logged in for 15 minutes, a popup message will appear to ensure you are still actively working. If you don’t click “continue session” you will be logged out but your work in notes, reports, and forms will automatically save to your todo list.

## Schedule

1. [Change view](#) (1 min 46 sec)
2. [Make or edit appointments](#) (2 min 18 sec)
3. [Mark attendance](#) (1 min 8 sec)

**Notes, Reports, Forms:** Items that work the same across Notes, Reports, & Forms.

1. [Selecting a supervising therapist](#)
2. [Save or submit](#) (2 min 12 sec)
3. [Add student & supervisor signature](#) (3 min 30 sec)
4. [Todo List](#) (1 min 45 sec) – Save to your own to do list or submit to another therapist.

**Notes:**

1. [Create a SOAP note](#) (2 min 27 sec)
2. [Add goals](#) (3 min 21 sec)
3. [Track Changes](#) (7 min 17 sec)
  - ✓ **Students should NOT turn track changes on when they first create their note.** They will turn it on when the note has been submitted back to them from their supervisor.
  - ✓ Once track changes has been utilized in a text block, it is "activated" in that text block regardless of if the track changes button is turned on or off.
  - ✓ For the PDF note to be accurate, all comments must be Accepted or Rejected.
4. [Mark goal complete](#) (1 min 38 sec)
  - ✓ Also, [edit/delete goals](#) and [edit/delete quantitative data fields](#). (students may not have access to this.) ONLY delete a goal or quantitative data field if it was made by mistake. When in doubt, mark the goal complete.

**Reports:** [Reports](#) (2 min 10 sec)

- ✓ Gray sections in the report designate text that was pulled from the client file. **If you type in the gray sections and click “Refresh Data,” your work will disappear.** We suggest typing only in white sections when starting your progress reports earlier in the semester.
- ✓ [Create tables](#) & [format your text](#) within the report.

**Forms:** [Forms](#) (2 min 52 sec)

**Client List:**

1. To view client: Click “View Client List”
  - ✓ This shows a complete list of the clients you have access to at your clinic.
  - ✓ Each client has their own folder in the client list.
  - ✓ Anything you create or upload for a client will be listed in this module.
2. Click on client name to expand, which shows an overview of the client including blue tabs with drop down options. They are as follows:
  - a. Notes - daily SOAP notes
  - b. Reports - i.e. progress reports, lesson plans, attendance reports, etc.
  - c. Files - Upload files to save in this specific client’s file. Make sure to give each file a unique name so that new files don’t overwrite old files.
  - d. [Contact Notes](#) - a place for you to document when you reached out to clients by phone or email