If you leave Checkpoint, you will want to download your client data. Below is how we suggest you do so.

Suggested Organizational Structure

When you export your data and documents from Checkpoint, we recommend that you follow our suggestions below. Before you begin, create a folder on your desktop background and name it something like, "Checkpoint Documents". Within Checkpoint Documents you will need to create a folder for each of the following:

- Staff Information
- Client Information
- Session and Claim Information
- Library Documents

The above structure will allow you to store Checkpoint documents efficiently so they can easily be found later. Make sure you save your items to the appropriate folder during the process.

Staff Information

Within this folder create 3 more folders named:

1. **Staff Credentialing:** Place the staff credential report here.
2. **Staff Demographics:** Place the staff demographics report here.
3. **Staff Attachments**: You may want to create a new folder for each staff member with the staff's name as the folder name. Place the Staff Attachments here.

Client Information

Within this folder create 2 more folders named:

1. **Client Attachments:** Place the Client attachments here. You may want to create a new folder for each client with the client's name as the folder name.
2. **Client Demographics:** Place the Client Demographics report here.

Session/Claim Information

Within this folder create 4 folders named:

1. **Claim Report:** This is where you will enter the Claims Accounting report.
2. **Progress Notes:** This is where you will enter the Progress Note PDFs. Create a folder for each client.
3. **ERA Report:** This is where you will enter the ERA report.
4. **Library:** Enter all library documents here.

This is how your new Desktop Folder outline will look.

- Checkpoint Documents
    - Staff Information
        - Staff Credentialing: Place the staff Credential Report here.
- Staff Demographics: Place the staff Demographics Report here.
- Staff Attachments: Create a new folder for each staff member with the staff's name as the folder name. Place the Staff Attachments here.
- Client Information
    - Client Attachments: Place the Client attachments here. Create a new folder for each client with the client's name as the folder name.
    - Client Demographics: Place the Client Demographics Report here.
- Session Claim Information
    - Claim Report: This is where you will enter the Claims Accounting report.
- Progress Notes: This is where you will enter the Progress Note PDFs. Create a folder for each client.
- ERA Report: This is where you will enter the ERA Report.
- Library
    - Library Documents

Now begin the process of exporting

Step 1: Retrieve Client Attachments (If you have such)

- Go to Menu Clients.
- Click on the Attachment icon for the first client.
- Once on the Docs & Dates page you will notice either a or in the list of documents.
    - If you see then there is no action needed for this client. Move on to the next one.
    - If you see then click this icon to view the attachments.
- To download the first attachment, click the icon and then the icon to download.
- You will need to repeat this step for each attachment.

Step 2: Retrieve Staff Attachments (If you have any)

- Go to Menu Staff.
- Once on the Staff List page you will notice either or beside each staff.
    - If you see, then there is no action needed for this Staff. Move on to the next one.
    - If you see, then you will want to click this icon to view the attachments.
- To download the first attachment, click the icon, which will then prompt you to specify where you want to save the attachment.
    - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.
- You will need to repeat this step for each attachment.

Step 3: Retrieve Client Information

- Go to the Reports menu.
- Then click the link labeled, "Demographics".
- On the Demographics Report filters page, enter the following parameters in order to retrieve ALL your client information:
    - Office: All
    - Lead Staff: All

    - Client Team: All
    - Client: All
    - Client Billing Ready: All
    - Client Status: All
    - Activated: Blank to Blank
    - Age: Blank to Blank
    - Prim Ins Provider: All
    - Payer: Blank
- Click "Run Report".
- Click the Export button at the top left of the screen.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so that you can retrieve it later.
    - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

<u>Step 4:</u> Retrieve Staff Information

- Go to the Reports menu.
- Then click the tab labeled, "Staff".
- Then click the link labeled, "Staff Report".
- On the Staff Report filters page, click the Run Report button.
- Click the Export button at the top left of the screen.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so that you can retrieve it later.
    - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

<u>Step 5:</u> Retrieve Staff Credentialing information.

- Go to the Reports menu.
- Then click the tab labeled, "Staff".
- Then click the link labeled, "Staff Credentialing Report".
- On the Staff Credentialing Report filters page, change the Staff Status field to "All".
- Click the Run Report Button at the bottom.
- Click the Export button at the top left of the screen.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so that you can retrieve it later.

- NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

<u>Step 6:</u> Retrieve Claim/Session Information

- Go to the Reports menu.
- Then click the tab labeled, "Claims/Financial".
- Then click the link labeled, "Claims Accounting".
- On the Claims Accounting Report filters page, change:
  - Session Status: All
  - Select the following check boxes to the right:
    - Details
    - Clients
    - Staff
    - Offices
- Click the Run Report Button at the bottom.
- Click the Export button at the top left of the screen.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so that you can retrieve it later.
  - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

<u>Step 7:</u> Retrieve ERA Information

- Go to the Reports menu.
- Then click the tab labeled, "Claims/Financial".
- Then click the link labeled, "ERA Report".
- On the ERA Report filters page:
  - Enter a date parameter for either Session Date, Payment Date, or Data Entry Date.
    - This is required before moving forward.
    - Enter a From Date far enough back so that it includes ALL ERAs in Checkpoint.
  - Click the Run Report Button at the bottom.
- Click the Export button at the top left of the screen.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so that you can retrieve it later.
  - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

Step 8: Retrieve Library Documents

- Go to the Library menu.
- Find the documents in your library that you wish to retrieve and click the icon to download.
- You will then be prompted to open or save the file to your computer. Save the file to your computer so you can retrieve it later.
    - NOTE* - It would be good practice to create designated folders to contain each document downloaded during this process.

Step 9: Retrieve Progress Notes

- Begin by clicking the Forms menu.
- Click on the link labeled, "Client Progress Notes - View and Print Multiple Notes".
- For best organization run this report for each Client separately. You may choose to run the report for all clients at once but be prepared for a very large file and a less organized print-out.
- To run the report for each client:
    - Select the client's name from the client drop down.
    - Enter the Session Date "from and to" fields to a wider range than you need. This will allow for all sessions to appear. For example: 01/01/2000 to today's date. The 01/01/2000 date should be long before your first session entered.
    - Session status should be set to "All."
    - Click Generate Form(s)
- You will now see the list of PDFs containing each progress note.
- Either print or save the documents to your computer for future reference.