All-in-One Office & Clinical Solution

Comprehensive, Smart and Easy-to-Use

The Basics
- One integrated all-in-one program for your office
- Inexpensive pricing is based on the number of clinicians and the activated features
- Integrated color-coded Graphic Scheduler with 5 min intervals for clinicians and staff.
- Direct Posting to Accounts from Scheduler
- Single or Batch Print 1500s, electronic EDI, and Patient Bills
- Authorization Alerts for Managed Care Patients based on authorization usage and expiry date
- Ultra-fast/Automated entry of Patient & Insurance Payments
- Keep scanned documents by patient with links in Medical Record
- EMR features includes notes, medical records and reports, with customizable templates and forms
- Customizable for Groups and Solo clinicians, different business configurations and different specialties
- Windows program for XP,Vista and Intel MACs
- Built-in live remote support

Ease and Speed of Use
- Full Screen Displays with Screen Access Buttons, toolbar with generic buttons and status bar visible at all times
- 3 Title Boxes (Corporate, Clinician, Patient) always show ownership of data on Screen
- All Names can be auto-selected by typing
- Selected Name is kept as different screens are opened
- Color-coding paradigm provides visual key
- Data is displayed in highly customizable super-grids
- All grids have pop-up menus that make it easy to find an action, and select one or more records to act upon
- All Grids open with a default range of records to minimize clutter, but history can be easily viewed over any selected date range
- Uses Windows fast keys
- Accounting Errors can be voided, with full roll-back and a voided record is kept in the transaction table
- Top-down design, many learnt defaults and smart updates tailor the program to your office, eliminate repetitive entry, learn parameters, and make the Program fast and easy to use
- Extensive Help and Help Notesl
- Includes utilities that eliminate need for other office programs
- The Opening/Appointments Screen is a true Desk-top or office-Control Center with Appointments, all Contact information, phone dialing and log, task manager and access to all screens
- The Scheduler has appointment search and Autobook
- Fast Book/Post Appointment with double click using defaults.
- Cut, Copy, Paste appointments
- Appointments can be marked as provisional, cancelled, waiting, missed etc.
- Appointments can be marked by treatment type
- Appointments clashing by clinician, room or patient are flagged
- Posting remembers all the previous settings so that this operation can often be done with a single click
- Sequential Postings can be done with a single click
- Simple, fast Patient Data Entry with auto-copy for Guarantor and Insured's data or a family member
- Templates and forms can be used in Medical Records to save time
- Auto-booking of Groups and auto-notes
- Follow-up tracking
- Business and Clinical Popup notelets for each patient

Patient Accounting
- 4 types of Patient Billing can be elected at Posting and saved as a default for each patient (except Missed):
  - Direct – full charge to Patient at time of posting.
  - Estimated – based on insurance allowed amount, co-payment, deductible and patient YTD totals
  - Deferred – Patient is only Billed after Insurance has paid
  - Missed – Patient is billed a fixed or proportional amount
- Patient Account balances reflect both amounts due from Patient and those expected from Insurance
- Patient Accounts have automatic aging
- Every patient or insurance bill can be reviewed and reprinted
- An integrated internet credit card capability
- An explanation box explains the rationale and payment history of each Patients or insurance billing record
- View by DOS or postdate

Insurance Billing
- Each Insurance Organization is only entered once with Providers Parameters such as In-network, IDs, and allowed Amounts (6 for Medicare) for each of the Providers CPT codes
- Each Insurance Plan is only entered once with contact information and whether Managed Care, co-payments, both variable and fixed, deductibles and maxima
- Each Patient can be assigned 3 Insurance Plans
- Archive of plans maintained for back billing
- Automatic authorization alerts
- Automatic tracking of insurance billing through the submission and payment stages
- Batch printing of paper or electronic (EDI) insurance bills
- Easy reprint of batch or individual bills
- Automated Entry of Payments from EOBs and ERAs
- All Delinquent insurance bills can be viewed and resubmitted

EMR
- Private Notes, Medical Records and Reports can be kept with separated access and locking
- 4 additional visible notes for separate topics
- Uses customizable templates
- Works with dictation or TabletPC
- Use and make your own checkbox forms with the Form Designer, and import the results into the record as prose
- Insert full DSM-IV or ICD-9 diagnosis from Diagnosis Screen.
- Insert patient's meds from Prescription Screen
- Insert "hyper-links" to lab-test results, handwritten notes, drawings, videos etc for immediate viewing

Prescriptions
- Electronic, paper and fax prescribing
- Indices of all meds, dosages etc
- Drug-drug interactions, allergies, monographs and notes
- Meds, dosages, regimens saved into a custom index making writing prescriptions, quick and easy
- Multiple meds on one script except for controlled substances
- Keeps lifetime printable record of all patients' meds.
- Records can be annotated
- Automatic renewal requests from pharmacy
- Lab Requests
- Adaptable to the different state formats
- Export a mail-merge list of patients on a specific med.
- Option to record med without printing

Continued Over

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Comprehensive

- Posts from Scheduler with single or multiple CPTs per visit
- Diagnostic Reports with DSM IV and ICD9
- EMR/Clinical Notes with templates, Private Notes and Reports
- View scanned records of any type by patient
- Contact Lists for the office and each user
- Email using your default email program
- Pop-up Notelets for each Patient, Contact, Plan, clinician, User
- Task/Workflow Manager, Expenses and Inventory for sales
- Zipped back-up and restore
- Patients can be Archived and Reactivated
- Multiple clinicians can make appointments and bill a Patient on their accounts from one patient record
- Phone, email and letter reminders
- Enter, print and record a Treatment Report
- Track referrals
- Export data to MS Outlook for syncing with PDAs and phones
- Databases can be switched eg. For covering a colleague
- Networked features include Automatic updates of appointments made by another user, patient waiting alert, and message light for IM messages sent through program
- Send Tasks to other users
- Shows the Appointments for all clinicians or for all Locations/Rooms for one Day
- Each clinician can view either/only his/her own patients or the complete list at any time and book any Patient

Customizable

- Clinician's Preferences can be set:
  - Regular Fee Schedule
  - CPT Codes and MOD Codes
  - Places of Service and Rooms with POS Codes.
  - Cancellation notice and Fee for Missed Appointments
  - Workday on Scheduler
- Providers Parameters for each Insurance Organization:
  - Whether in network or not, PINs etc.
  - Allowed Amounts (6 for Medicare) for each CPT code
- Users Preferences include
  - Appointments Screen colors
  - Information on Appointment printouts
  - Choice on opening Appointments Screen, day, Week etc.
  - Bill format
- Settable user rights to screens and clinician's records
- Wording of Dunning messages

Technical

- TheraManager looks and is state-of-the-art
- Designed as a robust full Windows XP, Vista Program
- Runs on MACs with Windows interface
- Features are added via regular updates
- Ultra fast, reliable, maintenance-free Database Engine, which when networked uses Transaction Processing to ensure failure-proof reliability of accounting operations
- Database engine can be accessed over the internet
- SQL is used exclusively to access the databases to maintain speed and reliability, and minimize network-traffic even with large databases

Business Accounting

- The program records, cash, checks, EFT or credit card transactions
- The program has an integrated Credit Card capability for keyed or swiped transactions using the internet instead of a phone line
- All checks and cash can be printed on a Deposit slip or list
- Checks can be written for business purposes or Patient Refund integrated into Patient Accounts
- A Bank Account record keeps all payments deposits and checks written, credits and debits by tax category with Reconciliation
- Keeps Expense Record by tax category and type
- Year-end Tax Report and/or Export to Turbo-Tax or Tax-cut
- Earnings of any clinician can be calculated using any one of several algorithms and checks written directly
- All financial transactions, including voided transactions, can be viewed, selected, sorted, grouped and printed in a user-configurable super grid
- The Program accommodates any mixture of corporate entities, partners working for a parent corporation, 1099 employees and individuals with complete separation of financial records but sharing Patients and Scheduling

Security, Privacy (HIPAA) and Fraud Resistance

- Users identified at Login with a password
- Users have restricted access to All Screens and some functions
- Users can have restricted access to records of each clinician
- Access Rights are set up in a separate password-protected Administrators Screen
- Each record and appointment has initials of user who created it
- A Receptionist might be allowed to accept pay-at-the-time, show Patient as Attended, but not Post the Appointment
- The database is encrypted
- Network transmissions are encrypted
- All financial transactions, including voided, are recorded, and displayed in one super-grid, where they can be analyzed
- Medical/Clinical Records are locked to prevent accidental deletion and tampering
- Private Notes are only accessible by User who created them

Printing and Reports

- Batch or individual printing of patients and insurance bills
- Default printing from the Toolbar Print Button on most screens
- Prints
  - Appointments by Day, Week, Room, for all Rooms and all clinicians
  - Patient Intake Forms with a separate signature page.
  - Appointments printed in different formats
  - Lists of Patients with contact info, account balances etc.
  - Print/mail-merge any type of roll or sheet label from the Patient, insurance or Contact Data
  - Lists of Insurance Organization and Plans by Patient or tree-Chart etc.
  - Patient's complete chart
  - Blank or filled-in Release Forms.
- From the Reports Screen
  - Annual summary for tax purposes
  - Monthly Receivables and Payments received
  - Outstanding Balances
  - Daily Reports
  - Discharge Reports
  - Many special reports that can be exported to Excel
    Print an appointment card at time of booking

Continued Over

For video & free trial go to www.theramanager.com
For help and info email customerservice@theramanager.com or call 800-913-4294 or 908-508-8900