

RESOURCE: 10 PRACTICE MANAGEMENT/BILLING PROGRAMS for therapy practices (with links to their web sites)

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As they become licensed and prepare to open a practice, various list members ask me what I consider the best practice-management and billing software.

Each year I circulate links to and info about some of the current programs in this rapidly changing field.

My basic \$.02 is that a program can be terrific for one practice but a disaster for another.

It's crucial to see how well the approach, features, and sometimes hidden costs (money, time, effort, learning curve, malfunctions, etc.) of each program match up with your specific wants and needs.

Differences between practices in terms of size, organization, procedures, and preferences can make a huge difference in what program "works" for a given setting.

Below I'm listing 10 widely used programs, along with links to their web sites. NOTE: I'm listing **only** those programs that will work with **both** Macs and Windows-based computers.

The web sites for each describe how the program functions, how it handles electronic claim submission (e.g., whether or not through a clearinghouse), etc. Some have free trial versions.

Here are the 10 programs and links to their web addresses:

SimplePractice - Practice Management System for Mental Health - Software for Therapists, Psychologists, Social Workers, and Counselors - "Easily access and edit clinical notes, diagnosis & treatment plans, billing history, and appointment schedules. Sync calendars and contact information with your smartphone or tablet so that everything is in one convenient place.... Simplify your billing and get paid faster with one integrated system to create statements, superbills, CMS forms and more. Accept cash, checks or use our credit card processing system. Export transactions to Excel or Quickbooks and view interactive reports for up-to-date information on your practice.... Whether you see a client one time or every three weeks, we provide you with the flexibility to create a schedule that fits how you work. Non-client events are easily added to your calendar so you can manage your whole life from one place. Use the SimplePractice mobile app to schedule from anywhere."

Their site is at:

[<https://www.simplepractice.com/>](https://www.simplepractice.com/)

Founded by a psychologist who began with a grant from the National Institutes of Health, PsyQuel has an interesting approach: It's a web-based practice-management system. According to their web site: "You are connected directly to our Service Center through the Scheduler. After seeing a patient, all you have to

do is mark the appointment as attended, and our Service Center is automatically notified that your appointment is ready for billing. We will submit your claim that day. We have built our web-based mental health software around your fundamental activities: scheduling and seeing patients. You and your staff don't have to master complex financial software because we perform these functions for you." They emphasize simplicity: "Everything is point- and-click simple. After seeing a patient, all you have to do is mark the appointment as attended, and we will handle the rest: tracking authorized sessions remaining, error checking, submitting claims, collecting insurance payments, resolving denied claims, posting insurance payments, reporting results, and analyzing your practice." They also emphasize security: "Our enterprise-size computers are located in a bank vault facility that has round-the-clock armed security, dry fire-suppression systems, temperature/humidity regulation, user access firewalls, and hospital-grade electrical power back up. Psyquel has multiple computers, each of which has multiple arrays of disks and is monitored continuously by technical personnel. Information is continuously backed up, tapes are stored off-site, and a backup network server is on standby in another location to ensure business continuation in any circumstance." They state: "We only service mental health providers; we do not require a long-term contract; and we charge nothing for self pay patients, or for setup, training, upgrades, or support."

Their site is at:

<<https://www.psyquel.com/about>>

TherapyAppointment is also a web-based program created by a psychologist. They describe it as "Practice management software for mental health professionals. One solution for online scheduling, electronic claims, EMR charting, appointment reminder calls, encrypted (HIPAA-compliant) email, and more! Patients can schedule online, and enter their own information so you can focus on clinical work. Billing is automatic: you simply chart progress notes. Designed by a psychologist in private practice to simplify every aspect of clinical practice." The web site also emphasizes accessibility: "As an online system, it is accessible to both patients and professionals from any computer at any time--PC or Mac. As an enterprise system, information from all parts of your practice are integrated, eliminating redundant computer work." Another focus is HIPAA compliance: "Provides a HIPAA compliant email alternative for messages from patients or coworkers. Encourages HIPAA compliant record keeping in charting, privacy, and records release. Encrypts patient information to ensure record safety unmatched by paper records."

Their site is at:

<<http://www.therapyappointment.com/>>

Argonaut Software is another program that is web-based. Among the features that the website mentions are: Schedule and Manage Client Appointments; "Powerful, Customizable eForms for a Truly Paperless Office"; "Your clients' Electronic Health Records (EHR) are maintained in Argonaut's easy-to-manage software"; Monitor Business Finances Related to Client Appointments;

Permission-based, Secure, and Encrypted Client Portal ; HIPAA-Compliant Secure Storage & Backup of Your Data; Integrated Credit Card Processing without a Merchant Account; Instantly Generate and Print CMS-1500 Insurance Forms; Manage Your Agency or Group Practice; Activity Reminders for Session Notes and Payment Processing; Unlimited Free Training.

The site is at:

<<http://www.argonautsoftware.com/features.html>>

ClinicSource is also a web-based program. They state: "Imagine having all of your SOAP notes, therapy forms and therapy billing software all in one, convenient, easy-to-access location even if you have multiple offices and therapists. ClinicSource utilizes the power, speed, and space of the Internet to bring you a total therapy software solution that will allow you to centralize and manage your entire therapy practice no matter where you are. ClinicSource therapy software allows you to efficiently keep your clinic in order." Among the features, according to their web site: Manage appointments and view schedules; Enter documents like SOAP notes with ease; Manage patient records as per HIPPA compliance Therapist can enter treatment logs for each patient; Send accurate claim submissions with the therapy billing software; With pre-loaded goals, create care plans and progress notes with ease; Keep track of outstanding balances; Easily manage payroll per therapist; Go paperless by uploading scanned documents like therapy forms; Go mobile and access your therapy software via iPhone, iPad or Blackberry.

Their site is at:

<<http://www.clinicsource.com/>>

eRecord: Online Behavioral Electronic Medical Record is, as the name suggests, another system that keeps your data on the web. They describe it as "a web-based behavioral EMR and practice management system for psychiatrists, psychologists, social workers and mental health counselors. The eRecord is online which means it is available 24/7 from anywhere. Clients can access it via a client portal where they can pay online, fill out forms, etc. In fact, the eRecord enables a practice to go completely paperless as paper documents can be scanned to the eRecord and maintained securely." One focus is the integration of clinical documentation, patient accounting, and claims: "Every time a clinician writes a Progress note or completes an Intake, a charge is posted to the patient's account and, if the patient has insurance, a claim is generated in X12 format for immediate submission to the insurance company. Thus, duplicate data entry, filling out billing tickets and the like are eliminated, saving time and money. Built in rules validate data to ensure clean claims."

Their website is at:

<<http://blog.carepaths.com>>

ShrinkRapt also uses the Clearinghouse approach: "The ShrinkRapt electronic claim module will prepare a print image file to submit to an electronic claims clearing house." They use the new CMS form: "ShrinkRapt 6.0 completes the

new CMS 1500 form with NPI numbers." They describe the program as "the best selling billing and insurance software for psychologists, psychiatrists, social workers, therapists, counselors and other mental health practitioners.

ShrinkRapt's primary use is to prepare client billing statements and complete the CMS 1500 insurance claim form. In addition, ShrinkRapt can be used to keep session notes, track medications, summarize practice statistics and more."

Their site is at:

<<http://www.sanersoftware.com/ShrinkRapt.html>>

TherapyNotes is "online practice management for psychologists, social workers, therapists, counselors, and psychiatrists." Its approach "makes it fast and easy to complete your notes. Our notes have been uniquely designed for therapists and psychiatrists, catering to specific needs of each profession.... Easily review what was entered on past notes without leaving the current note.... Works with Dragon NaturallySpeaking, Mac OS X Lion Dictation, and iPad Dictation.... Your office can now go paperless by uploading your patient files into TherapyNotes! Upload HIPAA agreements, intake forms, insurance cards, and other paperwork. We support all computer files including Word or Excel documents or scanned paper documents. These electronic medical records (EMR) will be encrypted and backed up by us, so you have one less thing to worry about."

Their site is at:

<<https://www.therapynotes.com>>

Practice Billing Service "provides expert automated billing for behavioral health professionals. We specialize in automated electronic billing services for psychology and psychiatry practices and mental health professionals. Our automated electronic billing service is HIPAA compliant. We take over your practice's billing, invoice and insurance reimbursement so you can focus on your profession.... Through our billing, patient invoicing, electronic claims for Medicare and managed care, and insurance follow-through, we take claim forms and other administrative burdens off your shoulders."

Their site is at:

<<http://www.practicebillingservice.com>>

EHR Your Way provides appointments, billing, and other aspects of practice management, but an interesting aspect of their records is: "We will make electronic copies of your paper documents which are then filled out in the EHR. This virtually eliminates training and change in workflow." They list the following features: Cloud Based * Works on all Devices * Client Portal * Internal Messaging * Pre-Client Tracking System * eRx * Bi-Directional Labs * Document Management * Auto-Import of Faxes * HIPAA Compliant * Triple Redundancy * 35 Servers * Access Rights Restriction * Interoperability with State & Counties * Unlimited Free Support * CARF Compliant * JCOR Compliant

Their site is at:

<www.ehryourway.com>