

Computers, Tablets, and The Cloud— Oh My: How To Inexpensively Facilitate the use of the Cloud And Computers/Tablets For Practice

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DESCRIPTION

This presentation will briefly review computer based and cloud based programs used to facilitate practice management. After the brief review, an in-depth, step-by-step approach to using the cloud, and your computer/tablet, to keep patient information, sync the information across your computers/tablets and implement free electronic billing all within a HIPAA compliant environment will be presented.



What We Will Cover

- 🌀 Review computer based, web based and cloud based programs
- 🌀 Using the cloud, and your computer/tablet, to keep patient information
- 🌀 Sync your patient information across your computers/tablets
- 🌀 Implement free electronic billing
- 🌀 All within a HIPAA compliant environment



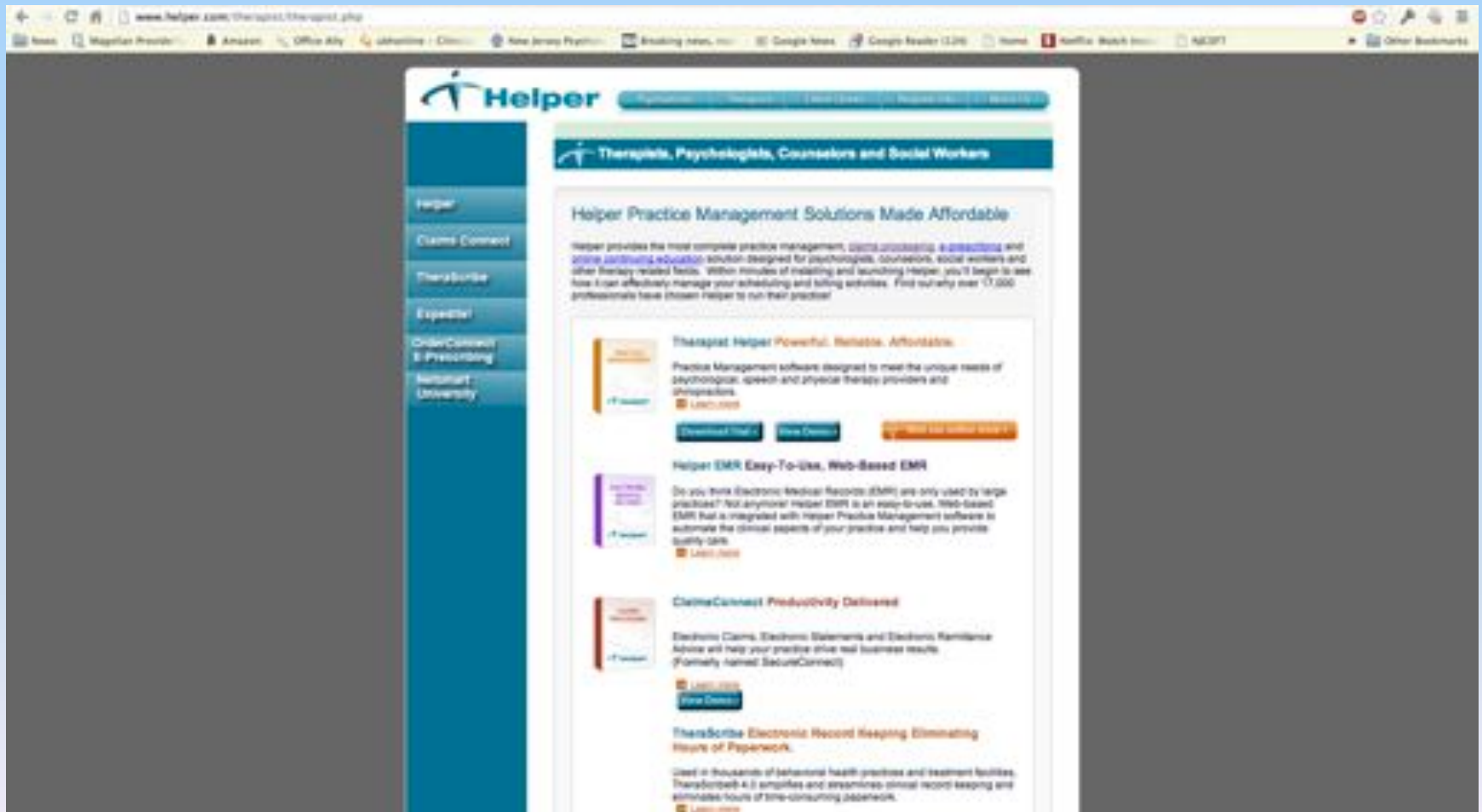
Learning objectives

- ✧ What are the similarities and differences among computer, web and cloud based practice management services?
- ✧ What are the advantages/disadvantages of using computer based, and web based programs for practice management?
- ✧ What are the advantages/disadvantages of using cloud based solutions?
- ✧ What is the cloud?
- ✧ What does it mean to sync folders and files?
- ✧ How to implement a HIPAA compliant, inexpensive cloud solution
- ✧ How to implement free electronic billing

Practice Management Software

- ✧ **Practice Management Software (PMS)** deals with the day-to-day operations of a clinical practice. Such software frequently allows users to capture patient demographics, schedule appointments, maintain lists of insurance payers, perform billing tasks, and generate reports.
- ✧ Most PMS systems are designed for small to medium-sized clinical offices. Some of the software is designed for or used by third-party medical billing companies. PMS is often divided amongst desktop-only software, client-server software, or Internet-based software.
- ✧ The desktop variety is intended to be used only on one computer by one or a handful of users sharing access

Computer Based Practice Management Software - Program is on your Office Computer



Computer Based Practice Management Software - Program is on your Office Computer

The screenshot shows the THERAQuick website homepage. At the top, the THERAQuick logo is displayed with the tagline "Creating Your Best Practice Success". A navigation bar includes links for Features, Products, Demos, Support, and Answers. A large central banner features the THERAQuick logo and the text "Streamline Your Therapy Practice Management". A yellow starburst graphic on the left indicates a "NEW 2.0 Upgrade". Below the banner, there are three main sections: "Introducing THERAQuick" with descriptive text, a central image of the software interface with a "CLICK TO WATCH VIDEO" button, and a "What Can It Do? TOP FEATURES..." section. The bottom of the page includes a "Latest News" section and a "Testimonials" section. A vertical "Ask Us" button is located on the far left edge of the page.

Ask Us

THERAQuick
Creating Your Best Practice Success

Features Products Demos Support Answers

NEW 2.0 Upgrade

THERAQuick
Streamline Your Therapy Practice Management

Download DEMO

Introducing THERAQuick

Simple: THERAQuick is easy to use, yet has the power to manage your small or large psychotherapy practice.

Smart: THERAQuick takes the hassle out of billing, claims & reports, automatically doing it for you with just a few clicks.

Steady: THERAQuick is elegant and fun to use - it streamlines your practice, taking you time so you can earn more income seeing clients.

Click to Watch Video

What Can It Do? TOP FEATURES...

Which Product IS RIGHT FOR YOU?

Compare Features TO HELP YOU CHOOSE.

Latest News

THERAQuick Highlights

Testimonials

THERAQuick is Ready for Firefox 12
THERAQuick has been updated to be compatible with Firefox 12.0.

THERAQuick - Simple, Smart, Steady

- Client and Insurance charging and billing
- Sophisticated reporting with custom options

We have seen users THERAQuick since

Computer Based Practice Management Software

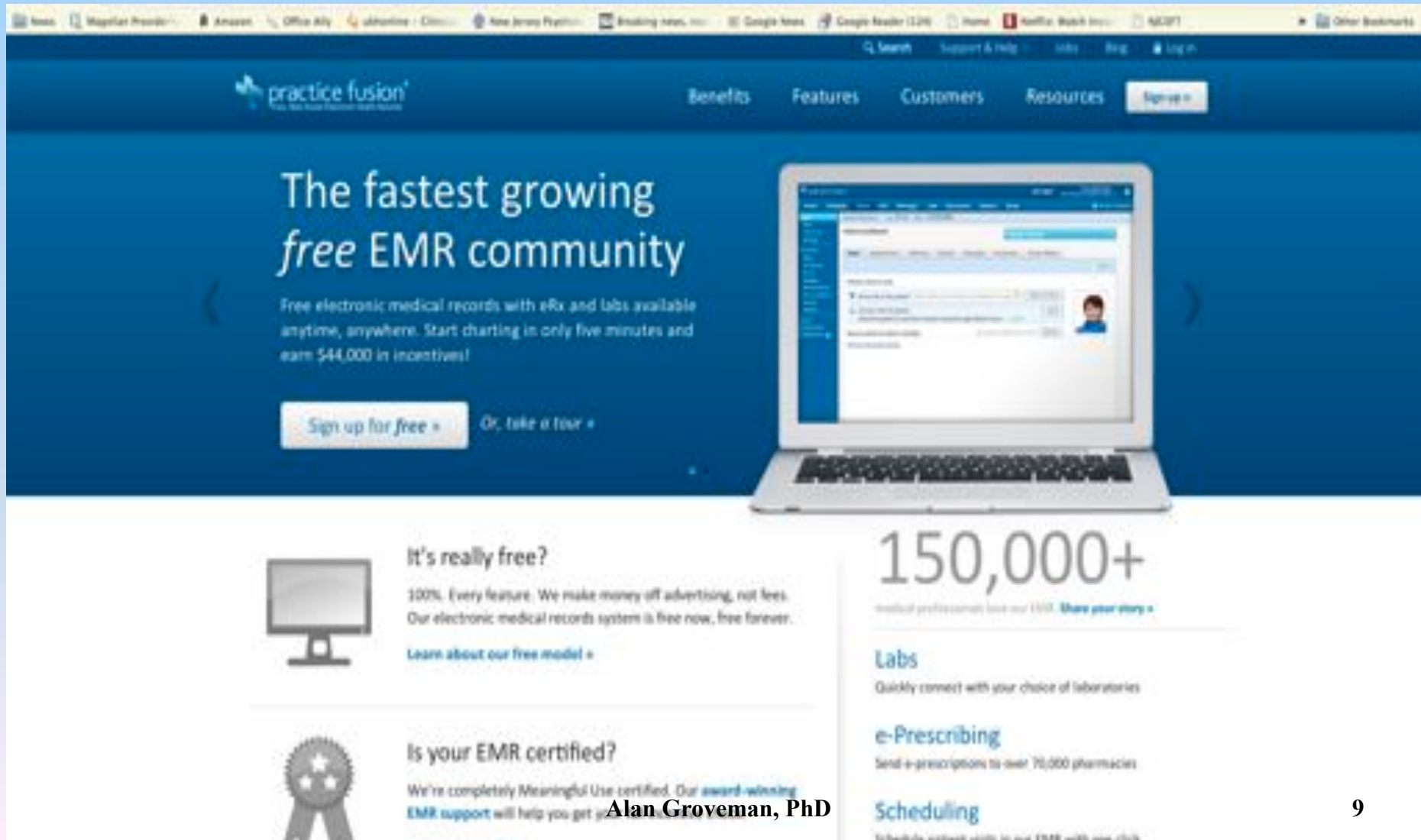
ADVANTAGES

1. Secure
2. Comprehensive
3. Established user base

DISADVANTAGES

1. Expensive
2. Steep learning curve
3. Need for updates – CPT changes, etc.

Web Based Practice Management Software- Use your Web Browser to Access



practice fusion

Benefits Features Customers Resources Sign up

The fastest growing free EMR community

Free electronic medical records with eRx and labs available anytime, anywhere. Start charting in only five minutes and earn \$44,000 in incentives!

Sign up for free Or, take a tour

150,000+ medical professionals love our EMR. [Share your story](#)

It's really free?

100%. Every feature. We make money off advertising, not fees. Our electronic medical records system is free now, free forever.

[Learn about our free model](#)

Is your EMR certified?

We're completely Meaningful Use certified. Our award-winning EMR support will help you get paid.

Labs

Quickly connect with your choice of laboratories

e-Prescribing

Send e-prescriptions to over 70,000 pharmacies

Scheduling

Schedule patient visits in our EMR with one click

Web Based Practice Management Software- Use your Web Browser to Access

The screenshot displays the TherapyNotes website interface. At the top, the navigation bar includes the logo, 'Features', 'Pricing' (with a sub-link for 'Breaking news, real-time scores and daily analysis from Sports Illustrated - 10.com'), 'About', 'Contact', 'Sign Up', and 'Log In'. The main heading reads 'Goodbye Paper. Hello TherapyNotes!' followed by the tagline 'Online Practice Management for Psychologists, Social Workers, Therapists, Counselors, and Psychiatrists'. A prominent green button encourages users to 'Try TherapyNotes! Now Free 30 Days on Trial!'. Below this, three feature cards are presented in a sequence connected by green arrows:

- Scheduling & To Do Lists:** Illustrates appointment scheduling with examples like '11:30AM Appt with Kyle' and '12:00PM Appt with Susan'. It includes a 'Create a Progress Note for your appointment on 8/28' button and describes how the system streamlines practice management and workflow.
- Patient Notes & EMR:** Shows a sample 'Evaluation' form with sections for 'Presenting Problem' and 'Treatment Goals'. It highlights that the form-based system is easy to keep up with and designed specifically for mental health and therapists.
- Electronic Billing:** Displays a 'Patient Billing' summary showing a 'Patient Balance' of '\$138.00' and a 'Patient Claim' button. It states that users can easily submit claims electronically with TherapyNotes EOB Track, view revenue reports, and generate CDM forms.

At the bottom, a testimonial from a user expresses gratitude for the website and service, mentioning their new part-time practice and the ease of using the EMR system. To the right of the testimonial is a 'Cloud Based Software' logo with icons for Apple, Windows, and iPad.

Web Based Practice Management Software-

Use your Web Browser to Access

ADVANTAGES

1. Secure
2. Comprehensive
3. Established user base

DISADVANTAGES

1. Monthly expense
2. Who owns your records?

Cloud Based Practice Management Software- Use your Computer/Tablet/Smart-Phone to Access folders and files in the Cloud

ADVANTAGES

1. Secure HIPAA Compliant
2. You use your own forms (notes, spreadsheets, etc.)
3. Inexpensive
4. You own your records

DISADVANTAGES

1. Initial set-up time consuming
2. Not as comprehensive – separate patient records and electronic billing programs

What is the Cloud?

What is Sync?



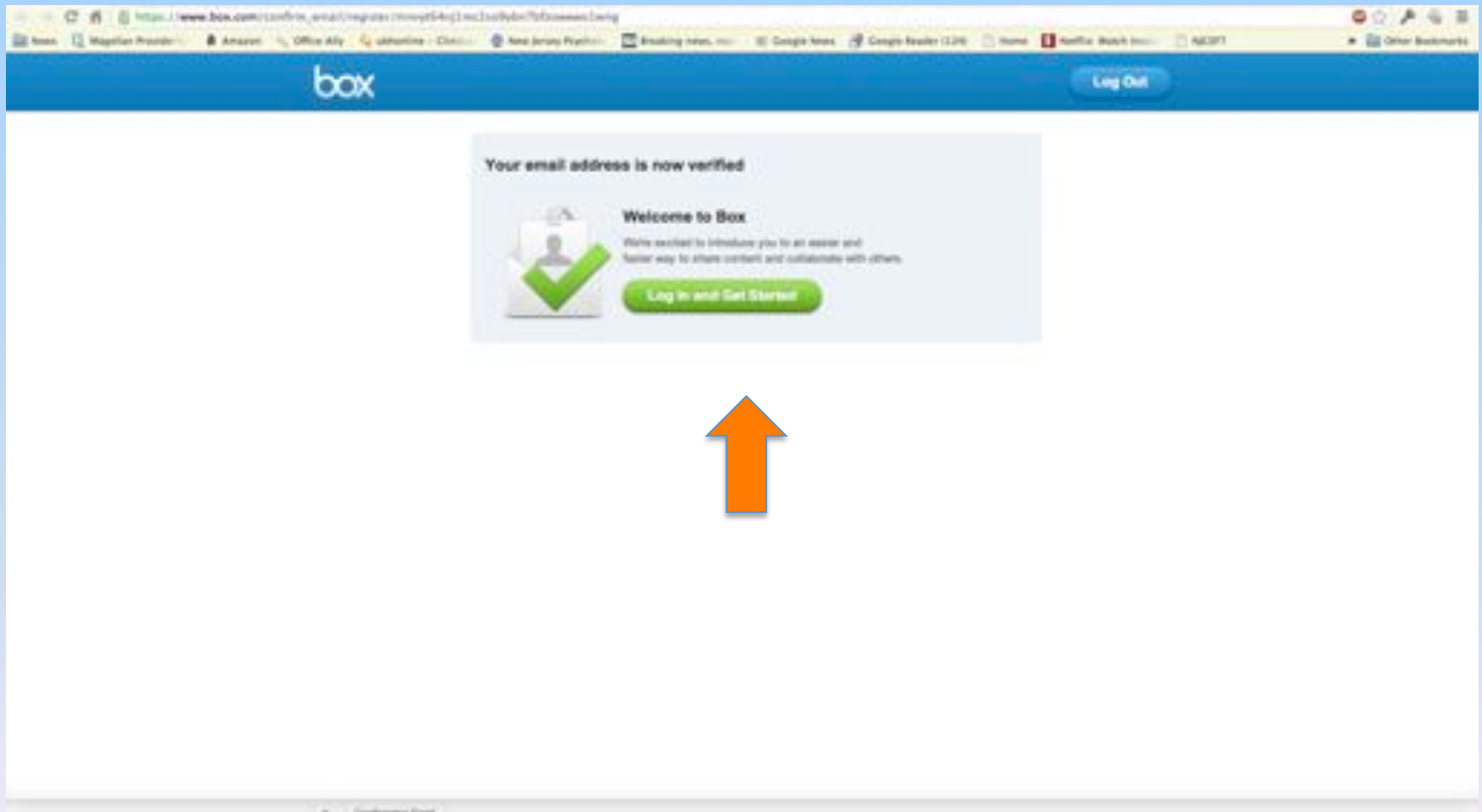
Implementing a Cloud Solution

1. On your web browser go to box.com and click Sign Up. Make certain that you select the “I agree this is for non-commercial use only” box. I have checked with Box and have been assured that a single user, even if they are a PA, can use the Personal Account without an issue.



Implementing a Cloud Solution

2. Once your email has been verified. You will be taken to the screen below where you can click on the “Log in and Get Started” button.



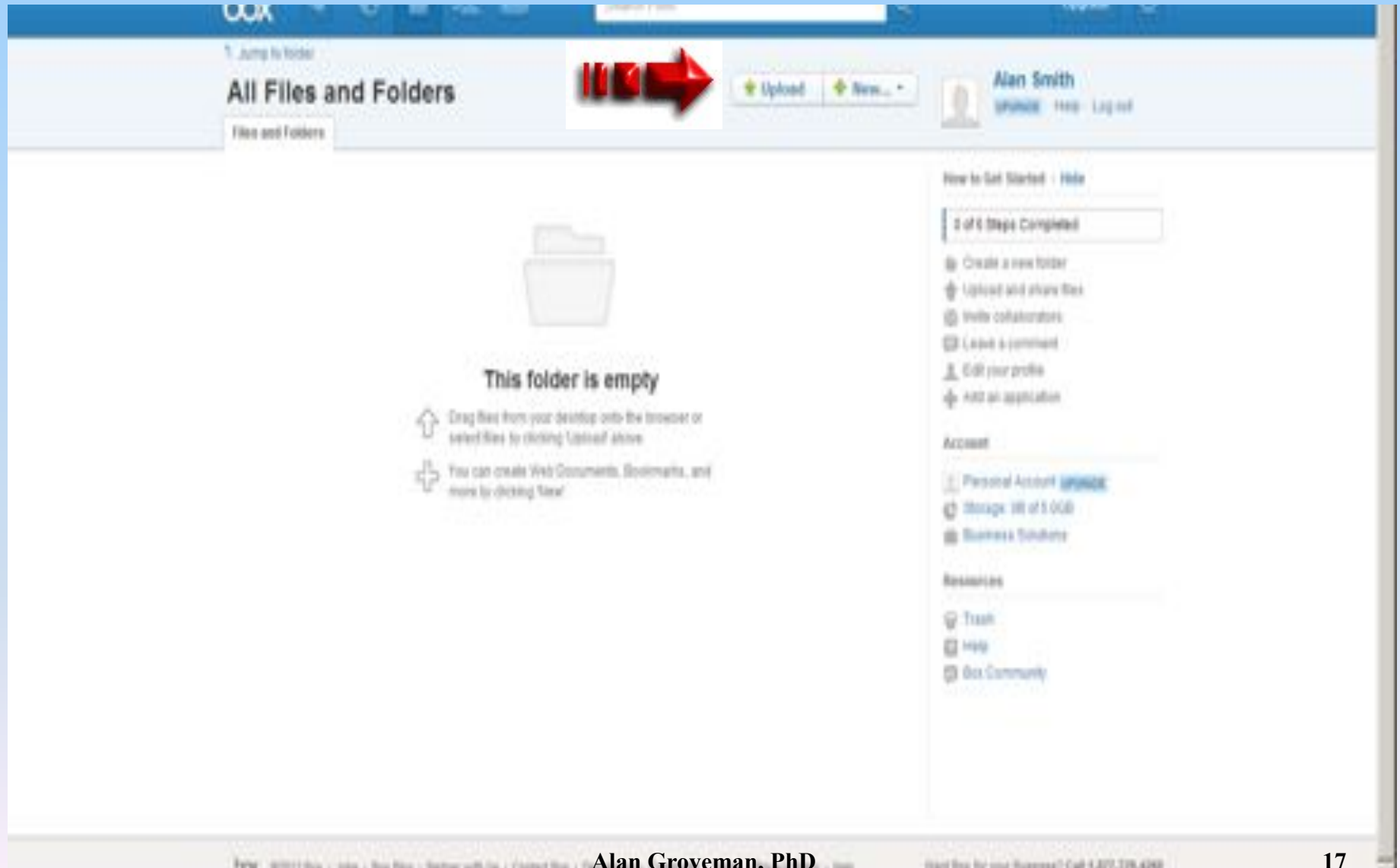
Implementing a Cloud Solution

3. After clicking continue you will be presented with the screen below. Click on the close button



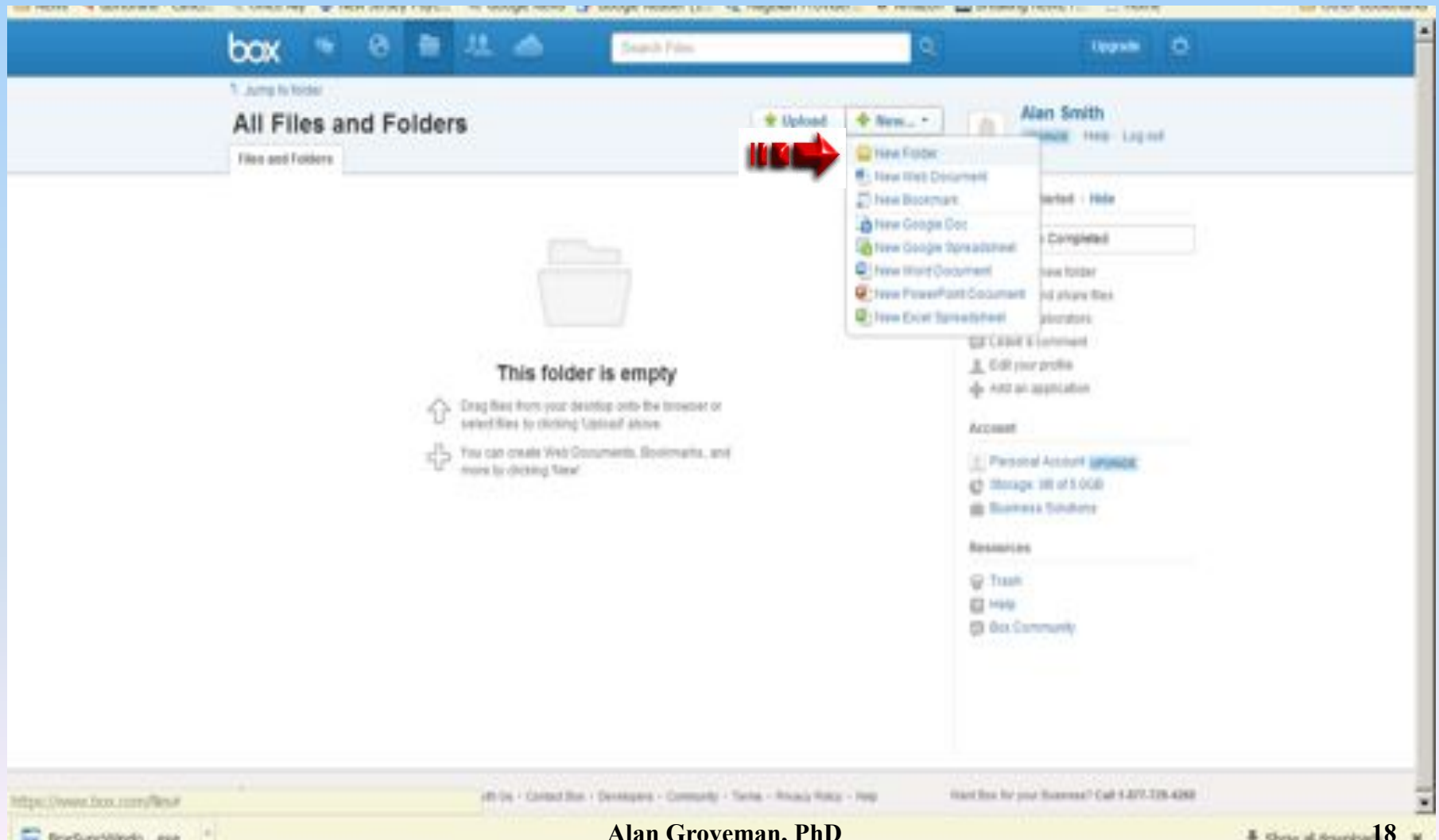
Implementing a Cloud Solution

4. The All Files and Folders screen with upload and New buttons is presented



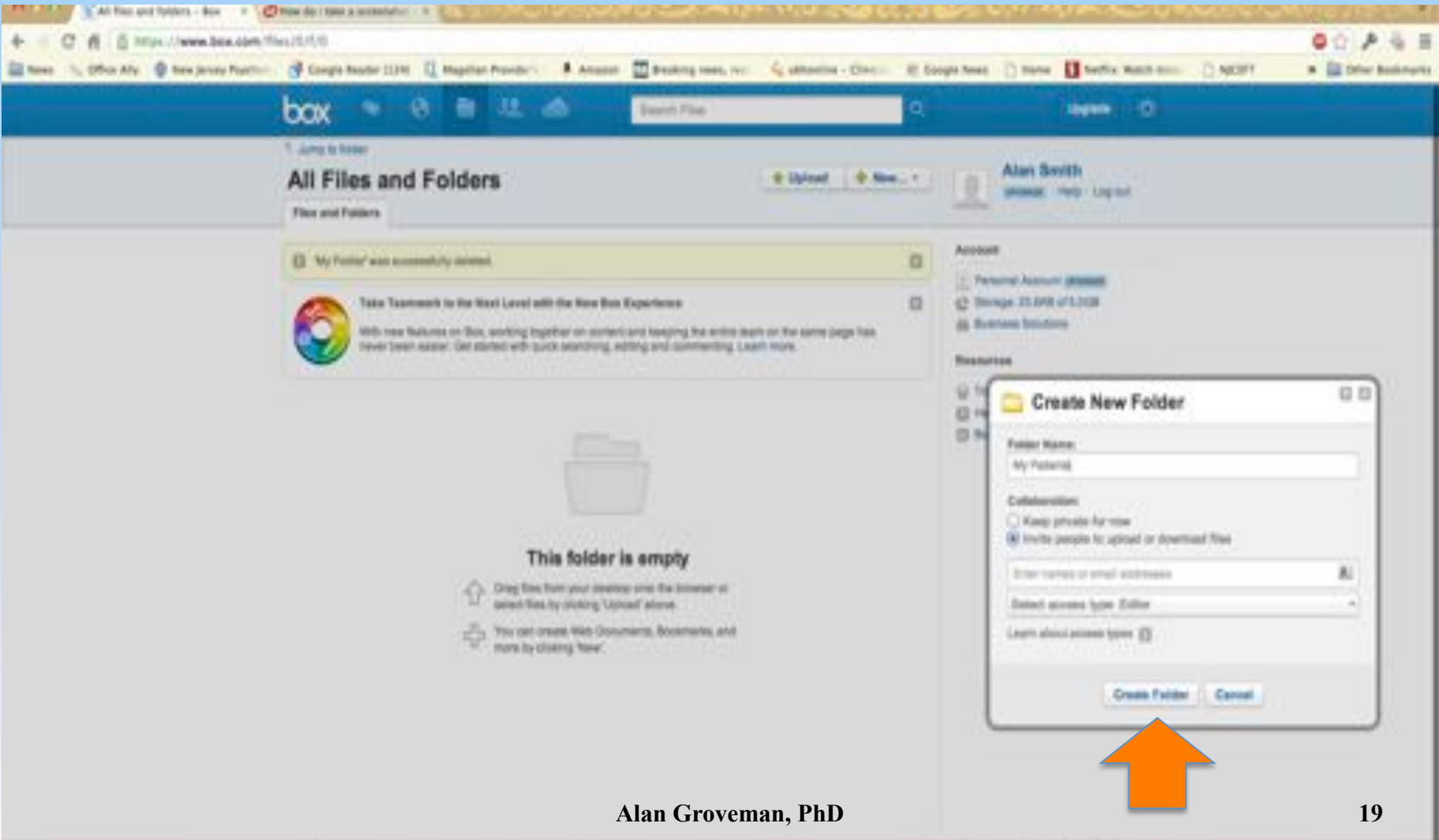
Implementing a Cloud Solution

5. Folder icon



Implementing a Cloud Solution

6. Type in the name you want for your new folder and click the Create Folder button

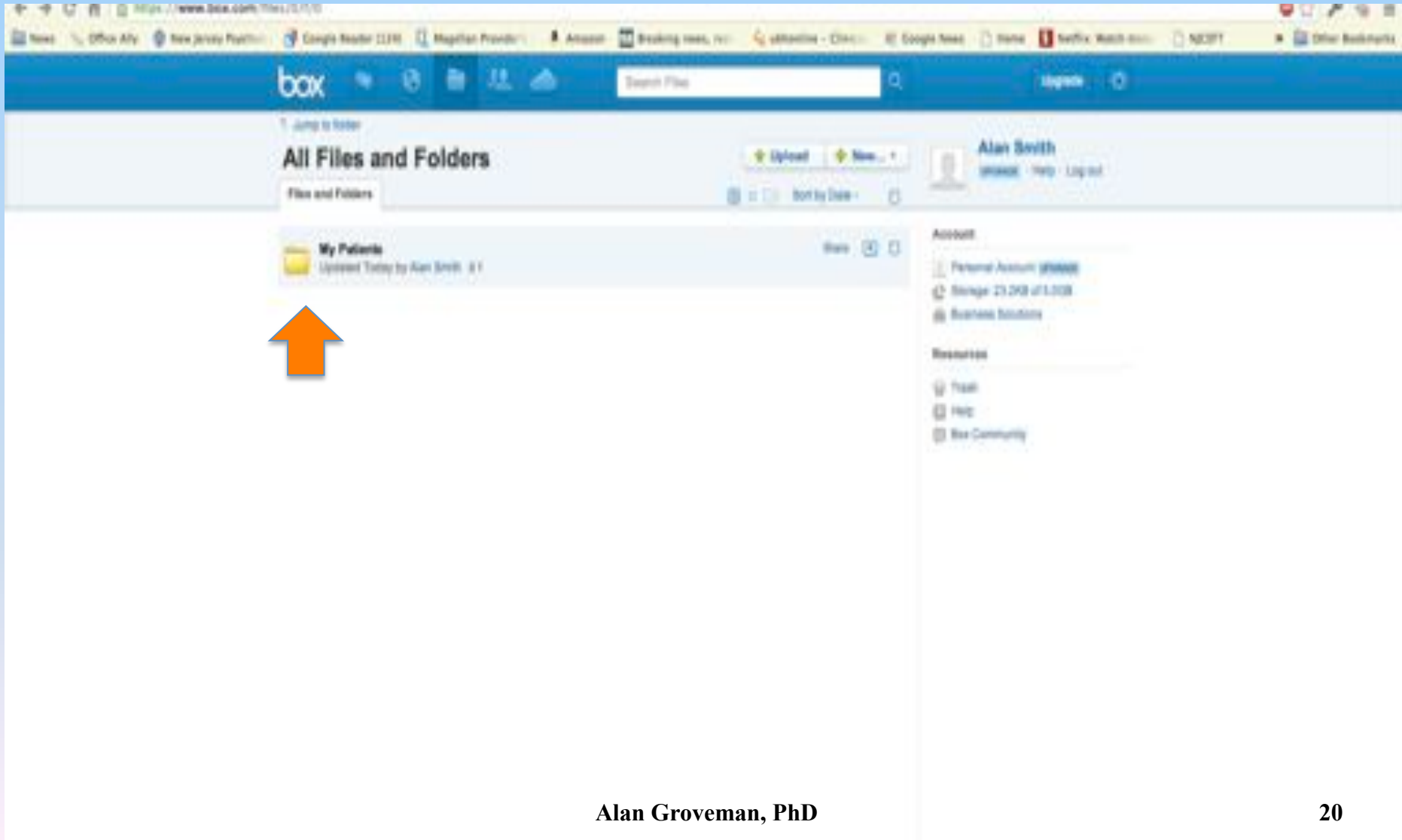


The screenshot shows the Box web interface. At the top, there's a navigation bar with the Box logo, a search bar, and a user profile for Alan Smith. The main area displays 'All Files and Folders' with a message 'My Folder' was successfully created. A large folder icon is shown with the text 'This folder is empty'. On the right, there's a sidebar with account information and a 'Create New Folder' dialog box. The dialog box has a 'Folder Name' field with 'My Folder' entered, a 'Collaboration' section with 'Invite people to upload or download files' selected, and a 'Create Folder' button at the bottom. An orange arrow points to the 'Create Folder' button.

Alan Groveman, PhD

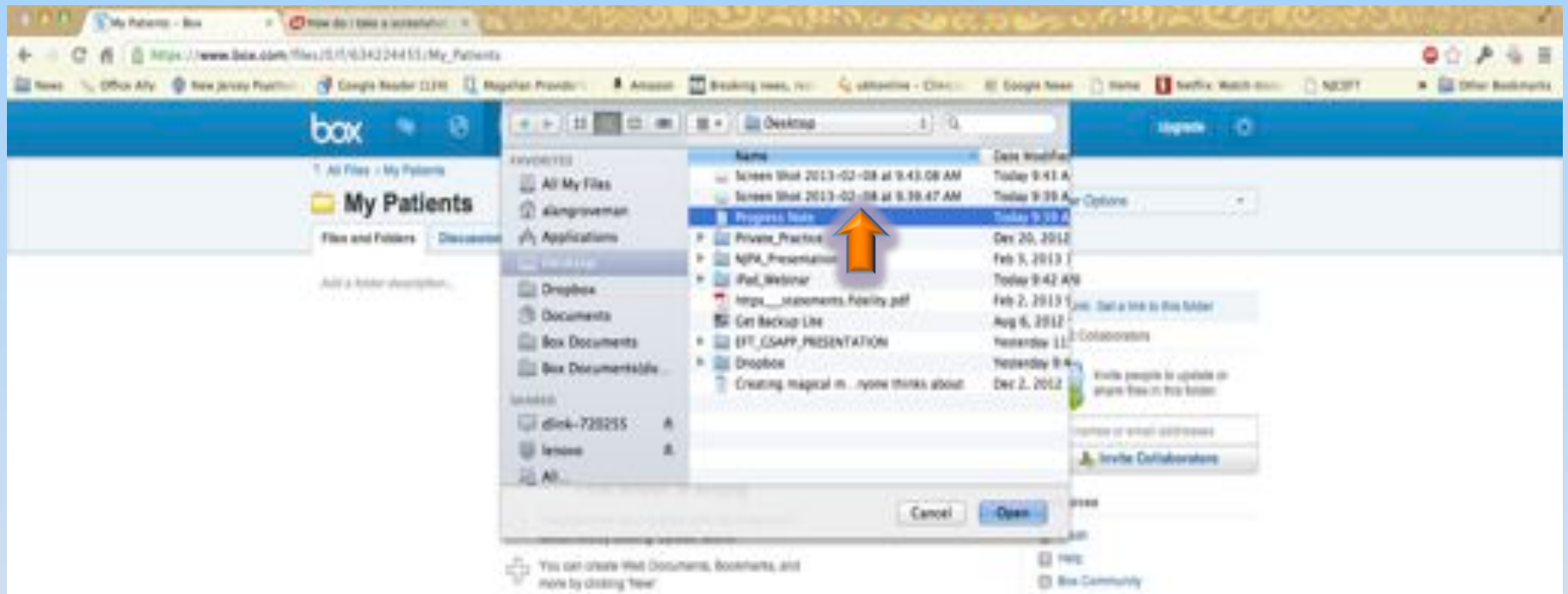
Implementing a Cloud Solution

7. The folder that you created will appear on the screen



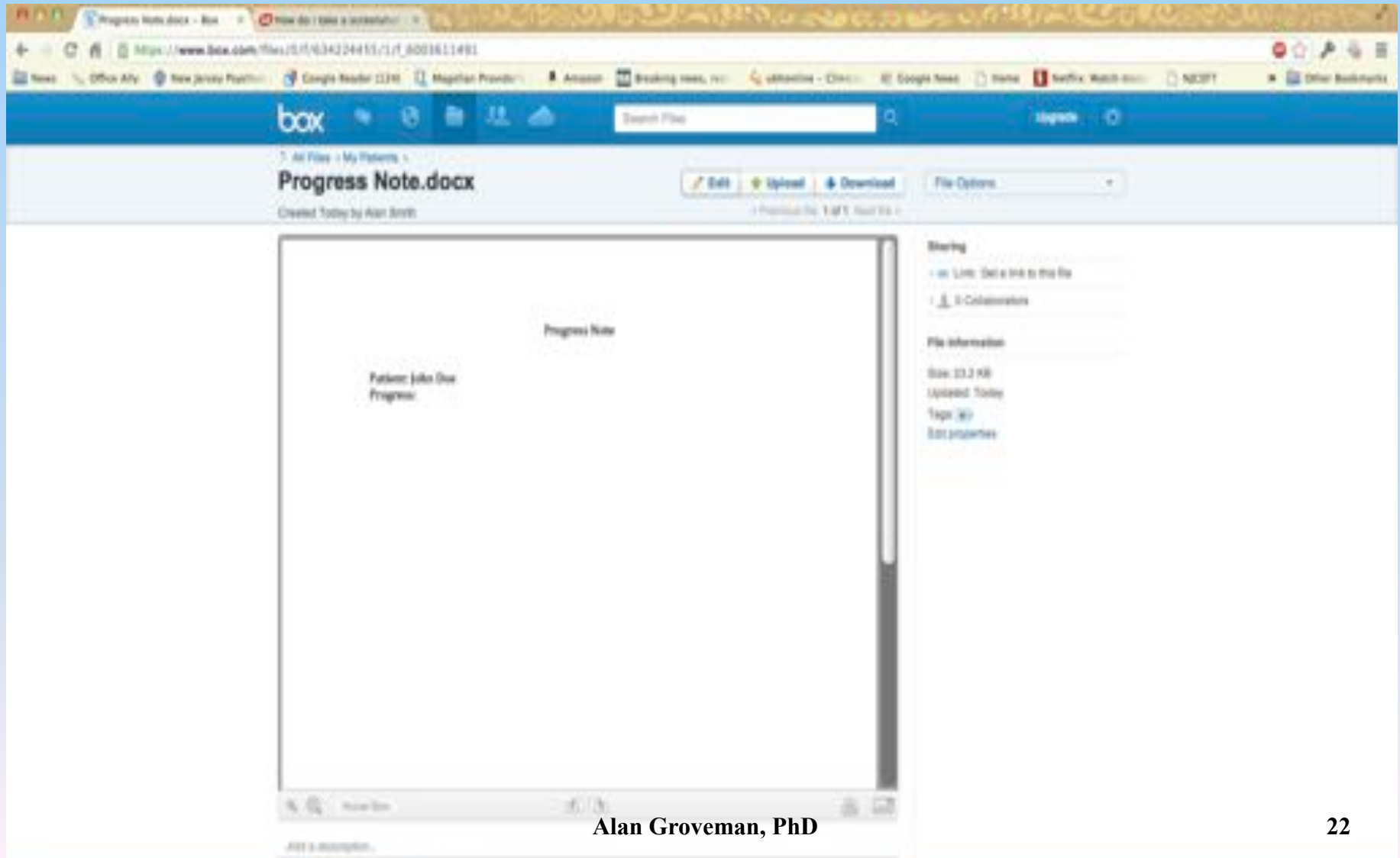
Implementing a Cloud Solution

8. Next, scroll to the specific file you want to upload and double click on that file.



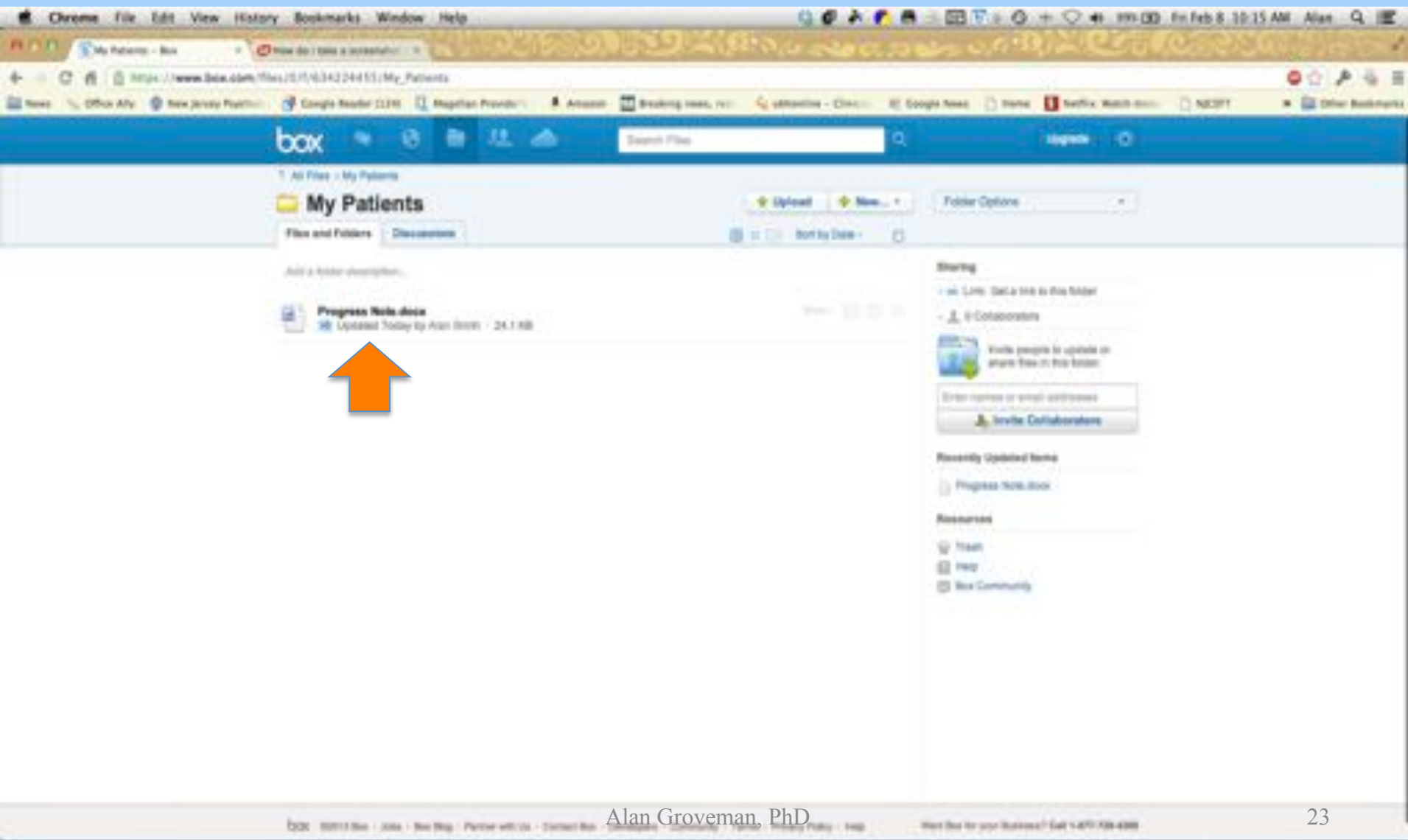
Implementing a Cloud Solution

9. You will then see the file you uploaded



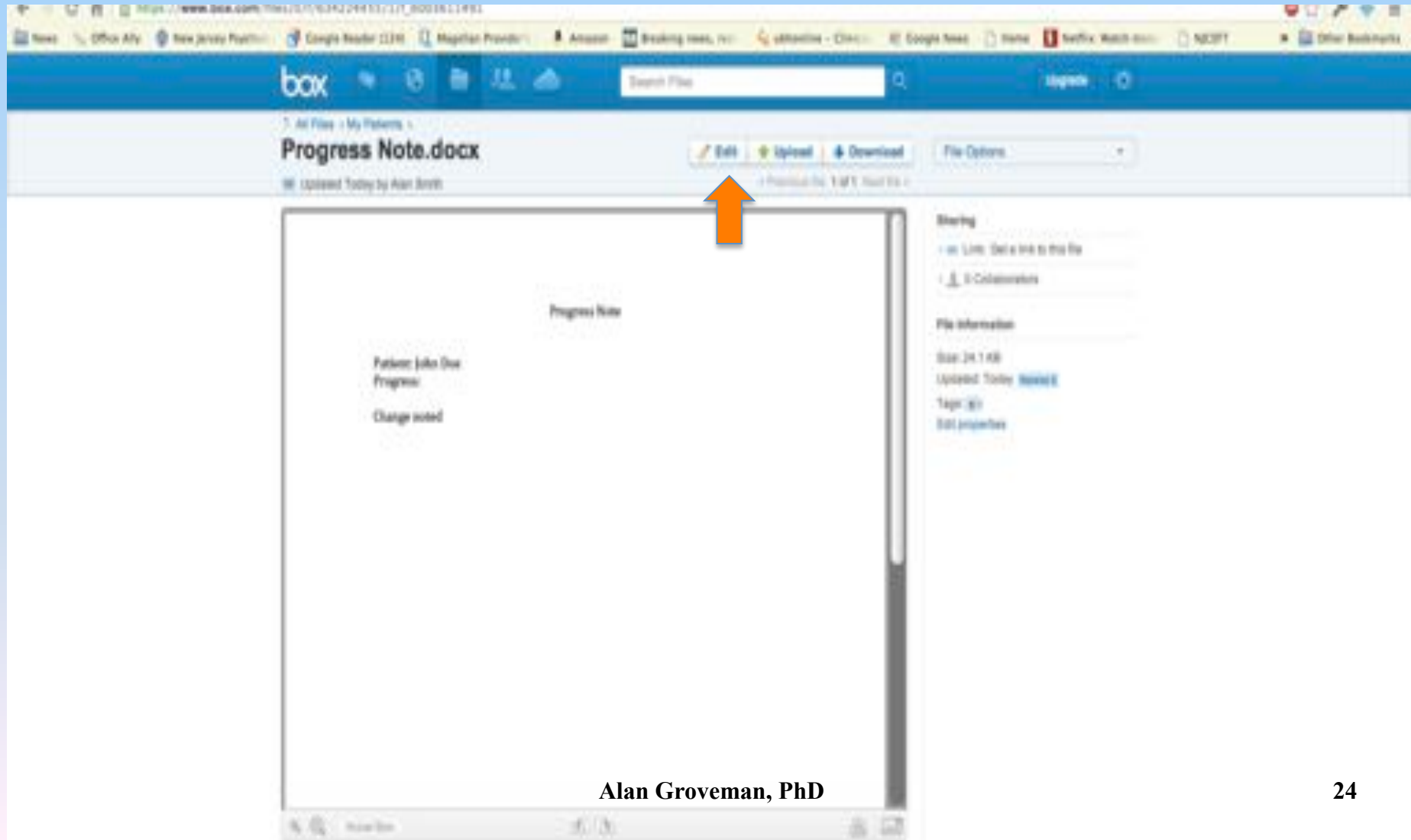
Implementing a Cloud Solution

10. If you uploaded more than one file, you can click the file that you want to edit to open that file.



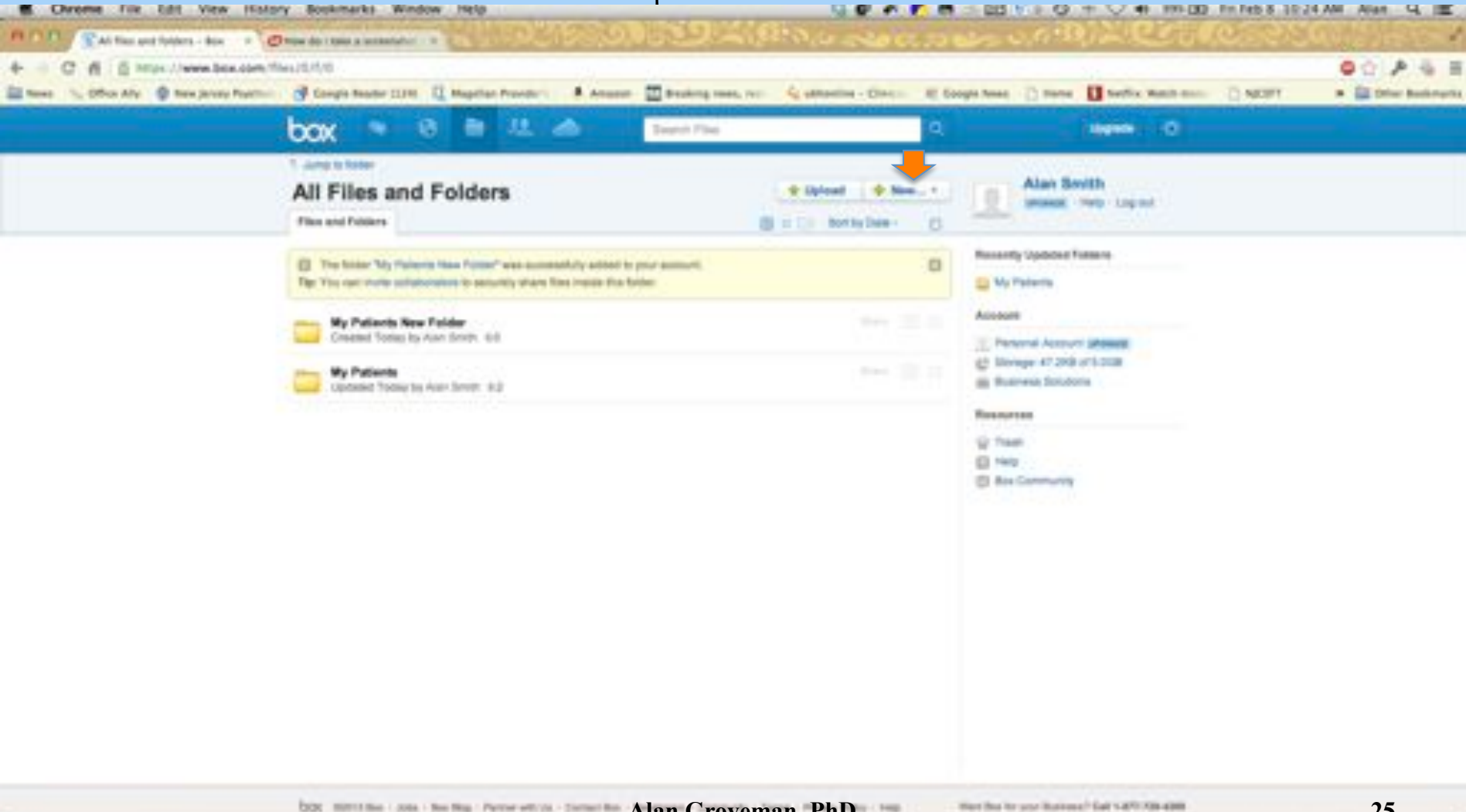
Implementing a Cloud Solution

11. To edit a file click on that file to open it. Clicking Edit for the first time will download an Edit application. Once the application is downloaded your file will be opened in a Word document, or PDF, etc. You can make changes and selecting Save from the documents navigation bar will save your edited file to your Box Account



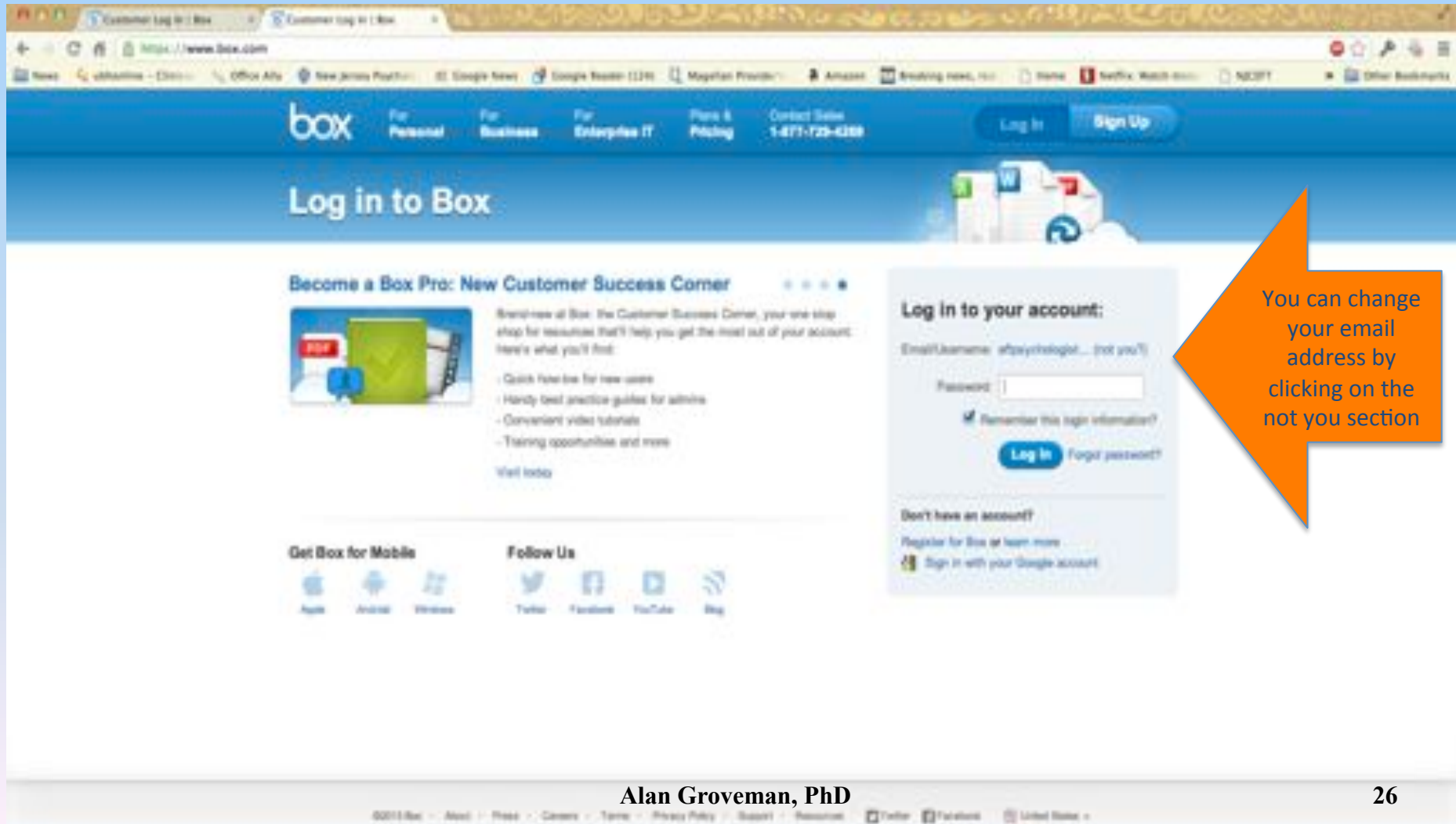
Implementing a Cloud Solution

12. NOTE: you can upload as many files as you like into the folder you created. Of course, you can also create a separate folder for each patient – Just click the New button, click on the New Folder button and name your new folder. and upload their files to that folder



Implementing a Cloud Solution

13. Now, from any computer you can go to <http://www.box.com> and select the Log in button to access this screen, or this screen will appear when you type in the address above. Then type in your email, if you need to, or change the email address to match your Box account, followed by your password and the Log in button



The screenshot shows the Box.com website's login interface. At the top, there's a navigation bar with the Box logo, links for Personal, Business, Enterprise IT, Plans & Pricing, and Contact Sales (1-877-723-4388). Below this is a large 'Log in to Box' heading. The main content area features a 'Become a Box Pro: New Customer Success Corner' section on the left, which includes a list of resources like quick start guides, handy tool practice guides, convenient video tutorials, and training opportunities. On the right, there's a 'Log in to your account:' section with fields for Email/Username and Password, a 'Remember this login information?' checkbox, and a 'Log in' button. Below the login fields, there's a link for 'Forgot password?'. At the bottom of the login section, there's a 'Don't have an account?' link, a 'Register for Box or learn more' link, and a 'Sign in with your Google account' link. An orange arrow points from the right side of the page to the 'Log in to your account:' section, with the text 'You can change your email address by clicking on the not you section'.

box
For Personal For Business For Enterprise IT Plans & Pricing Contact Sales 1-877-723-4388
Log in Sign Up

Log in to Box

Become a Box Pro: New Customer Success Corner

Brand new at Box: the Customer Success Corner, your one stop shop for resources that'll help you get the most out of your account. Here's what you'll find:

- Quick start guides for new users
- Handy tool practice guides for admins
- Convenient video tutorials
- Training opportunities and more

Visit today

Log in to your account:

Email/Username:

Password:

☒ Remember this login information?

[Forgot password?](#)

Don't have an account?

[Register for Box or learn more](#)

[Sign in with your Google account](#)

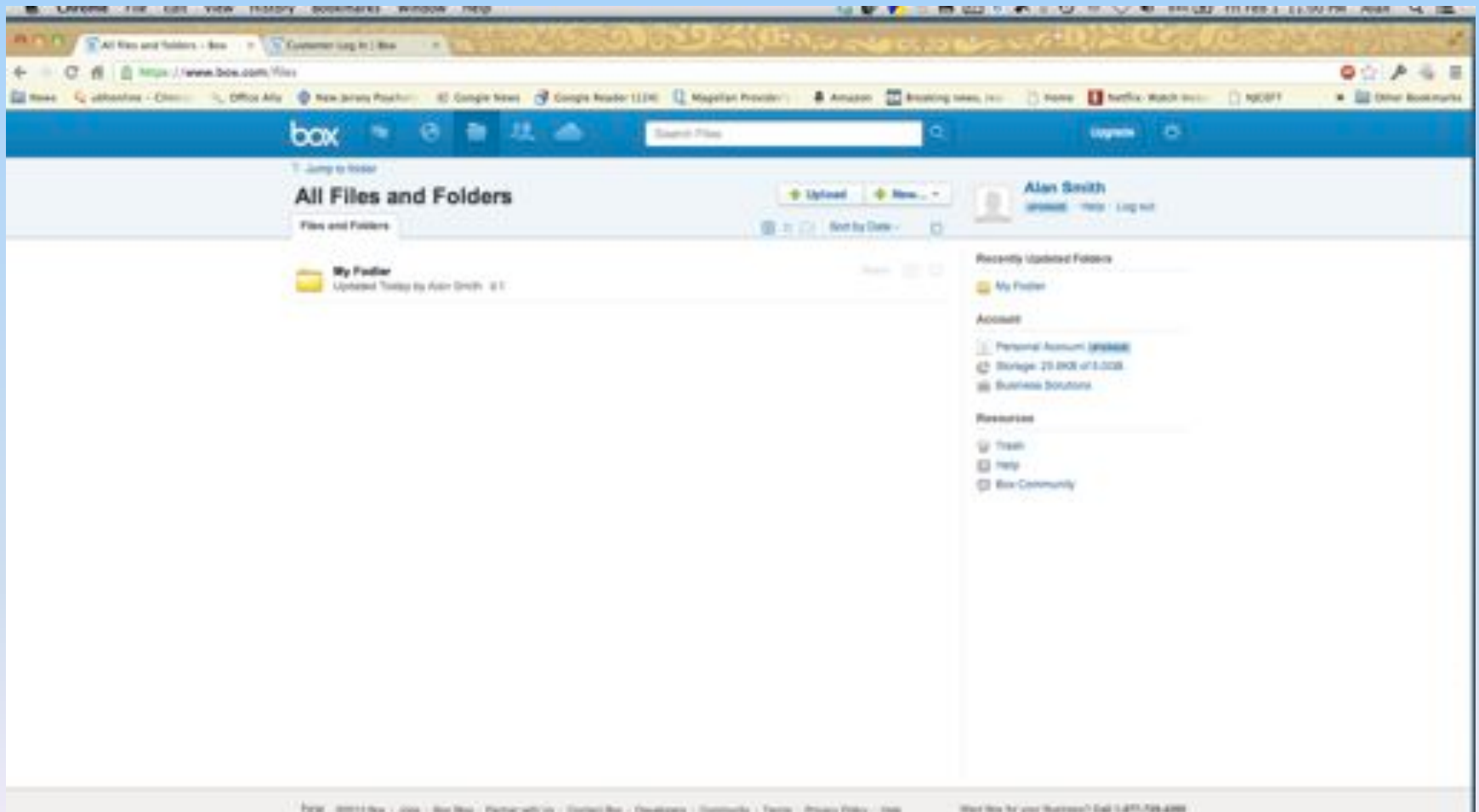
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Implementing a Cloud Solution

14. You can now create a New Folder, upload, and/or edit any of the files in your folder NOTE: the Edit button does not have to be selected, editing will be launched automatically



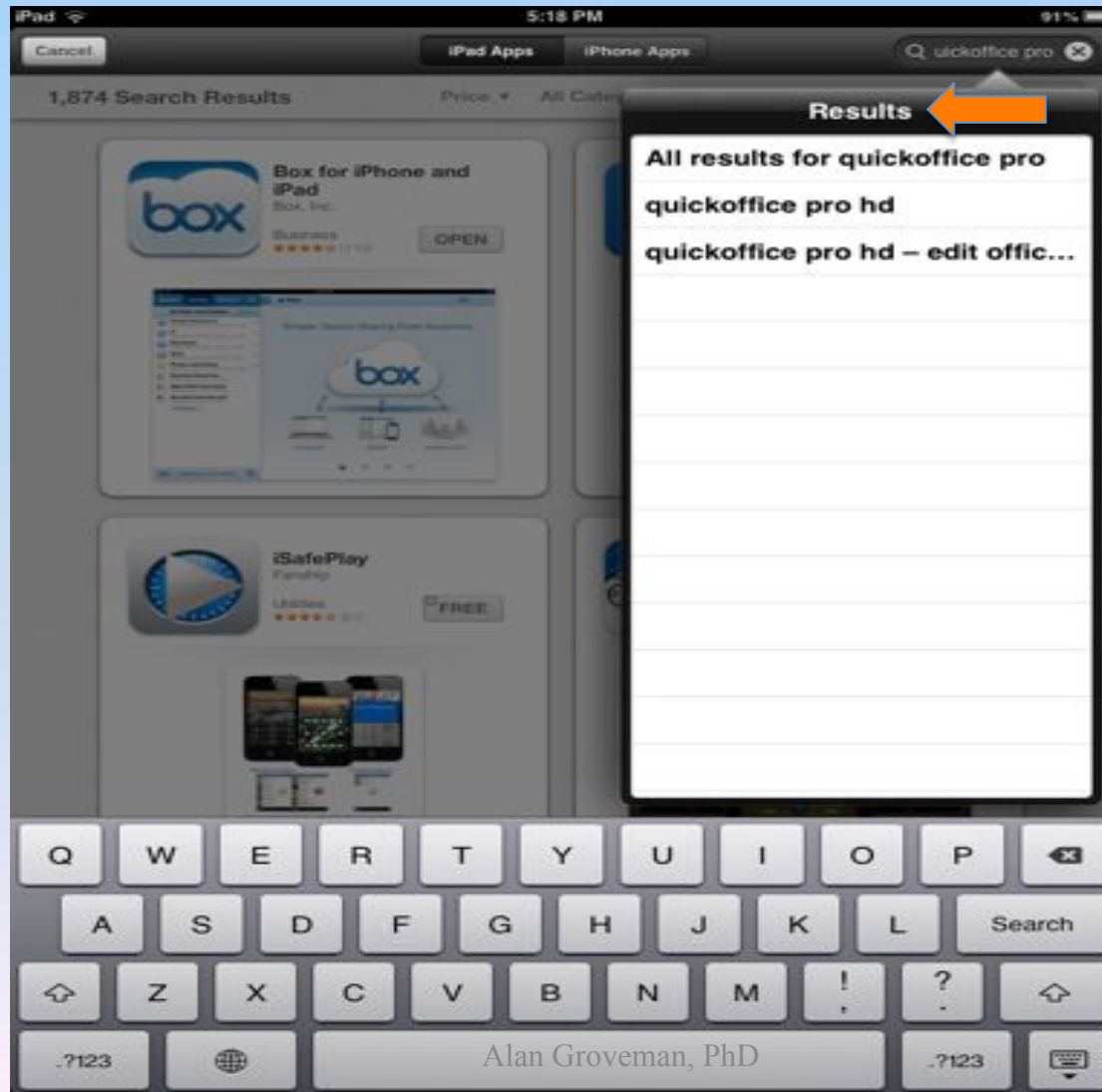
Implementing iPad Applications

1. On your iPad click on the App Store app and search for box and click on box.com and install the free Box application



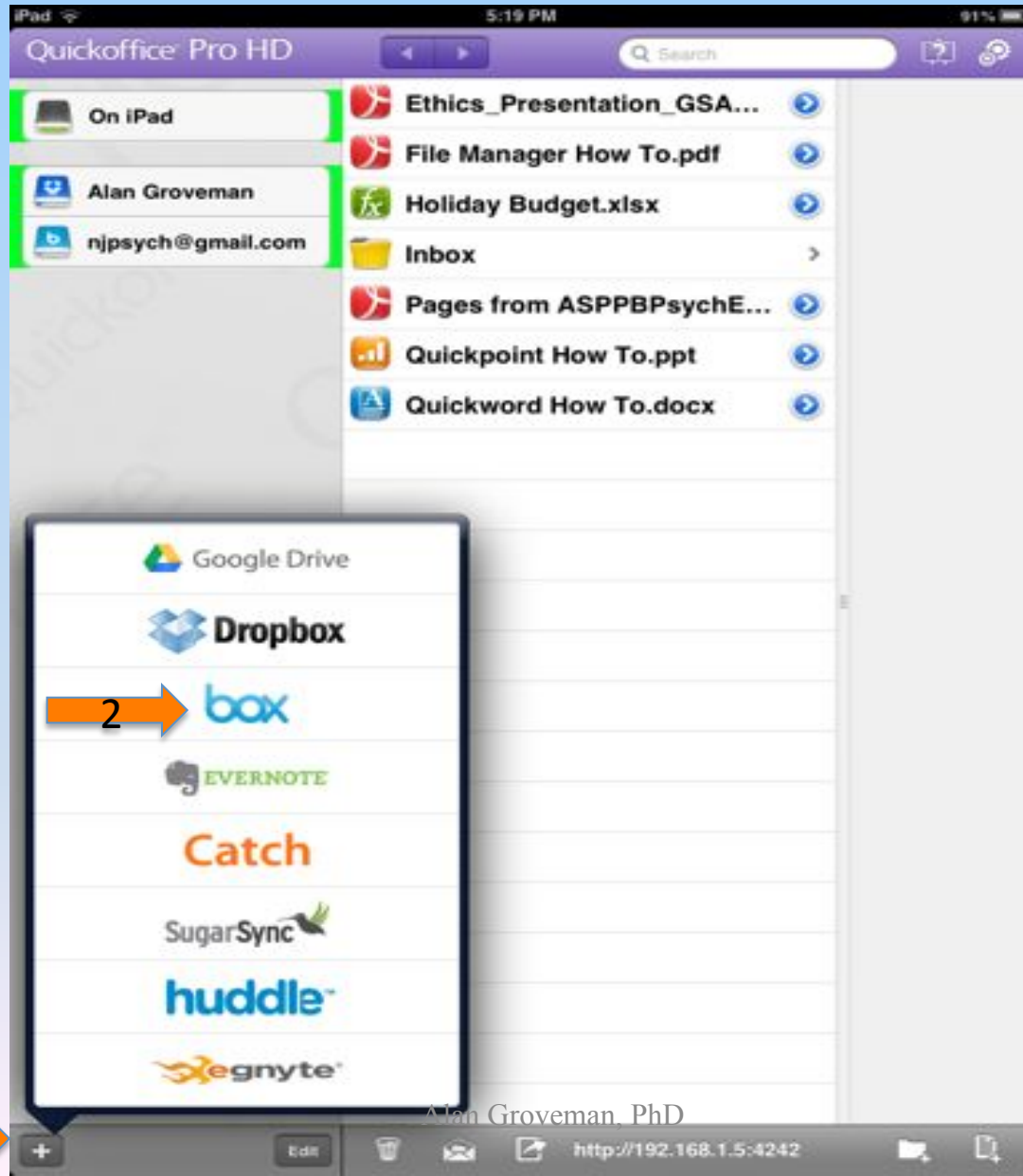
Implementing iPad Applications

2. Next return to the App Store and search for quickoffice pro hd and click on that selection and install the quickoffice pro hd application (\$19.95)



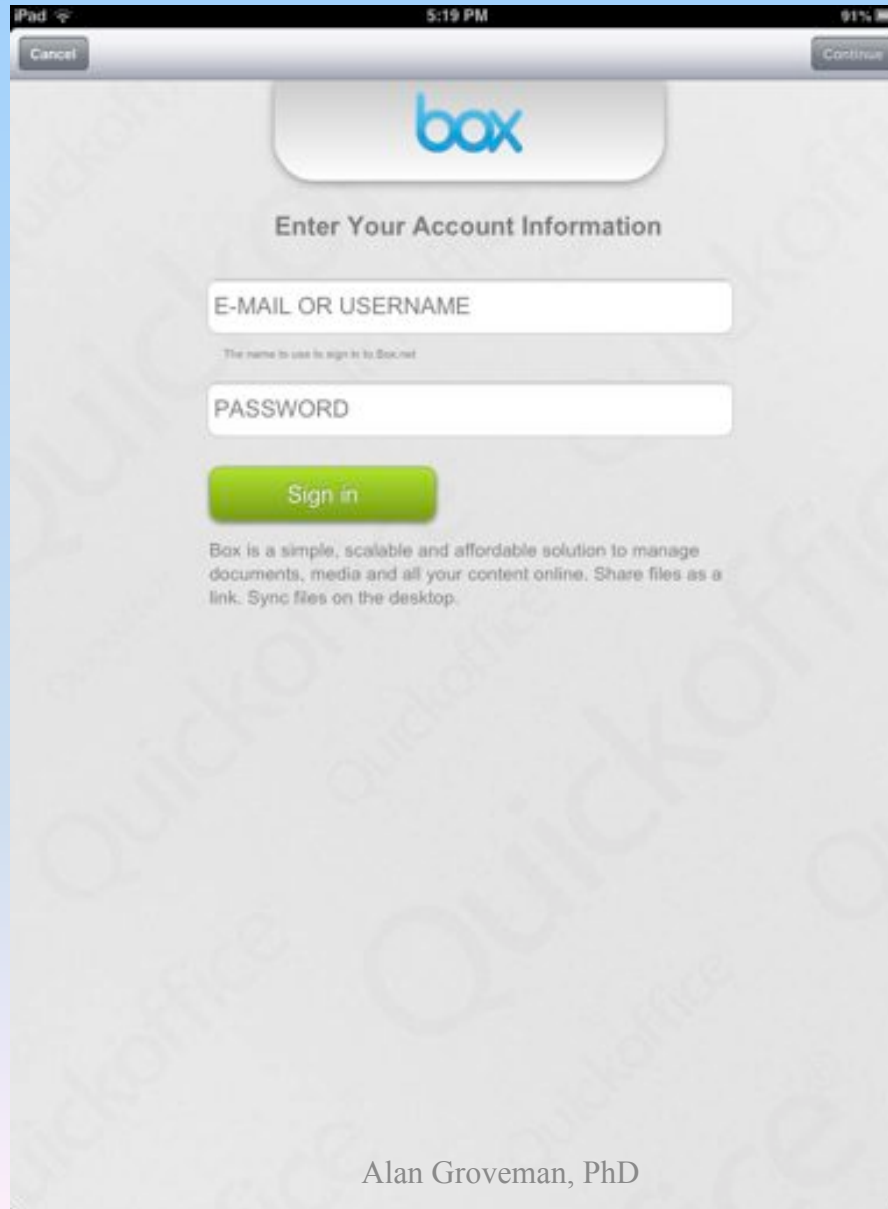
Implementing iPad Applications

3. Once Quickoffice pro HD is downloaded open the application and click on the + button (1) and then click on the Box icon (2)



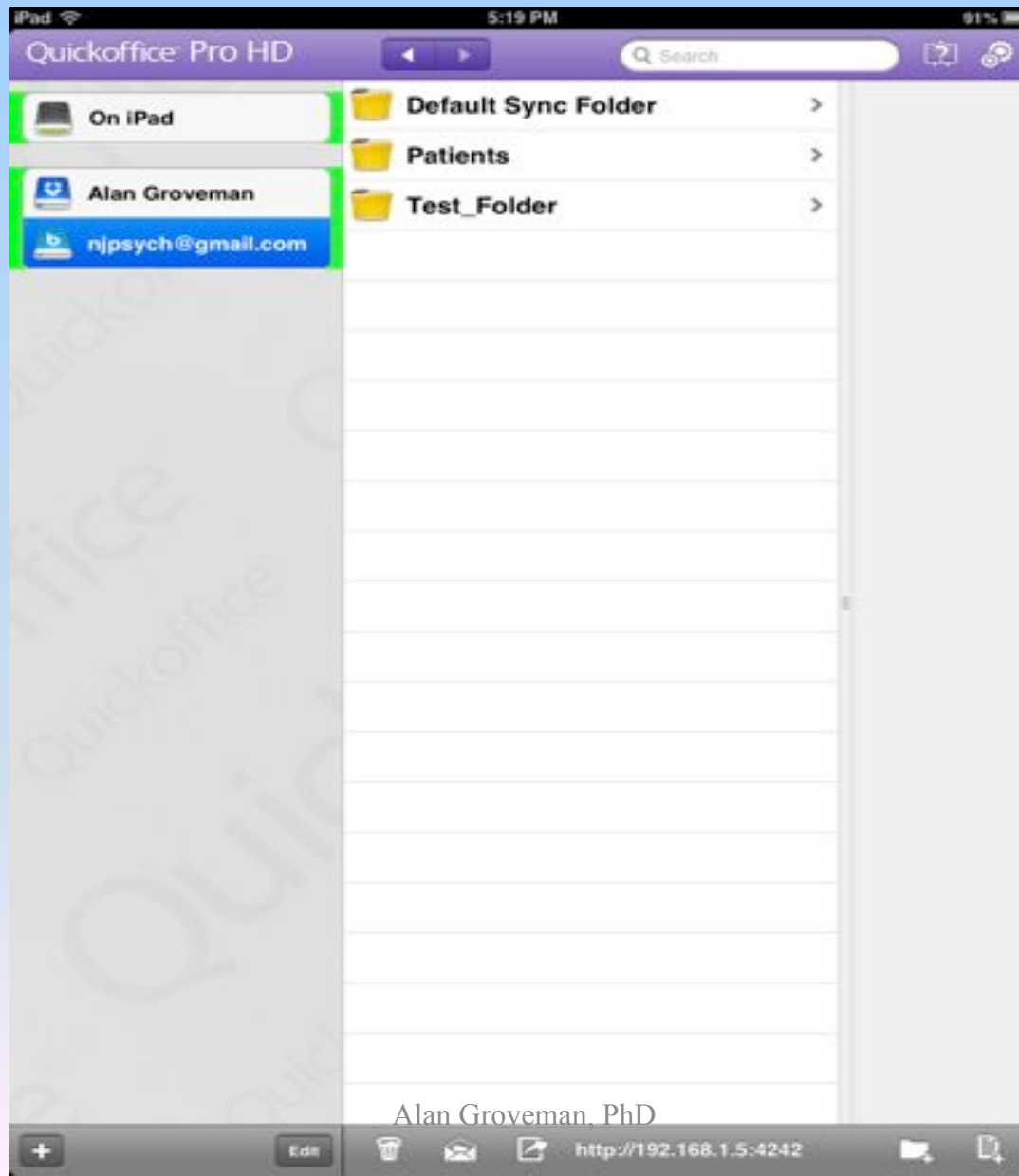
Implementing iPad Applications

4. The Box screen will appear. Type in your Box Account email and password and then click on the Sign in button



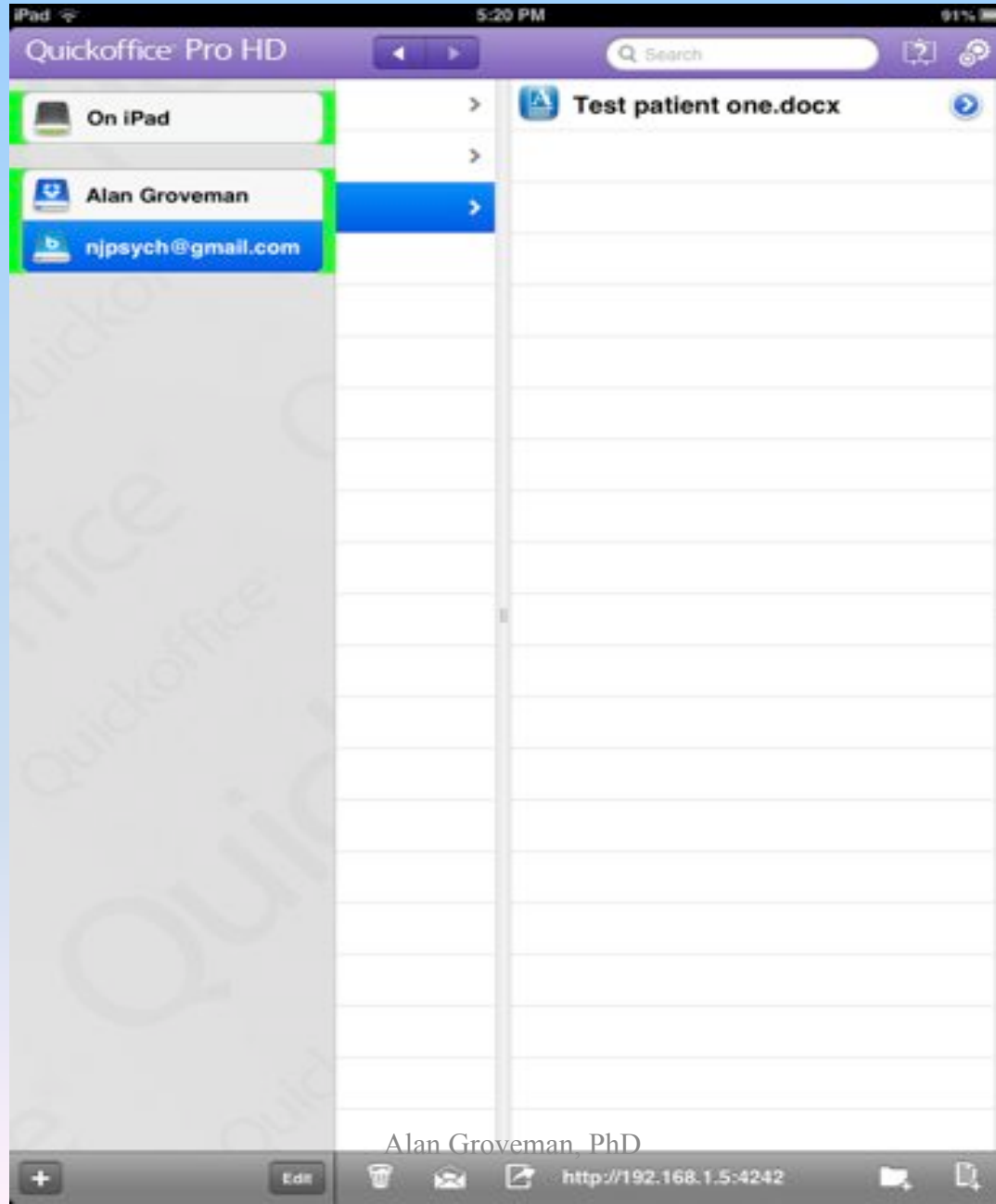
Implementing iPad Applications

5. Your Box Account email will be highlighted and the folders you created will be displayed



Implementing iPad Applications

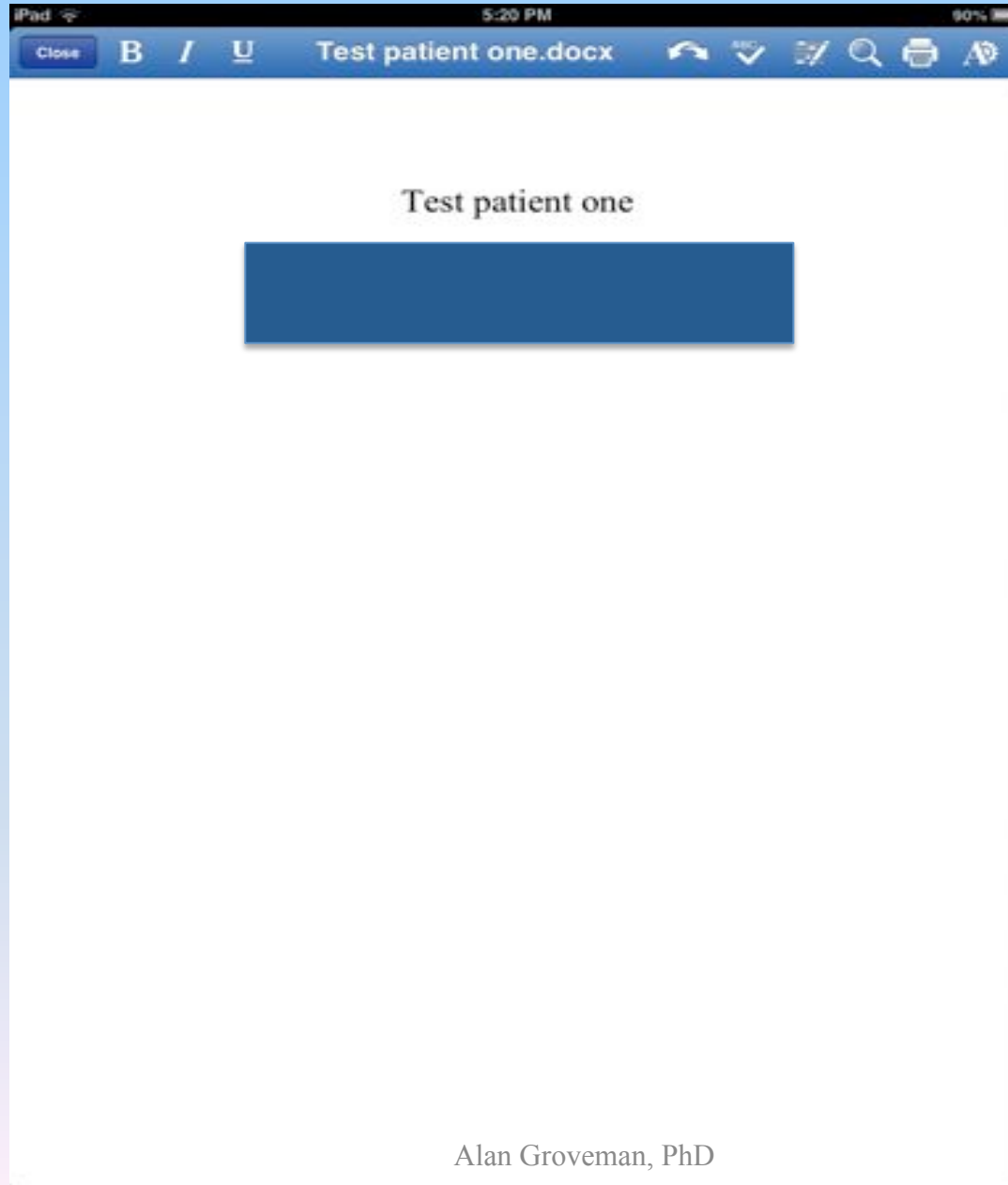
6. Click on a specific folder and then click on the file you want to edit



Click on
the file
you want
to edit

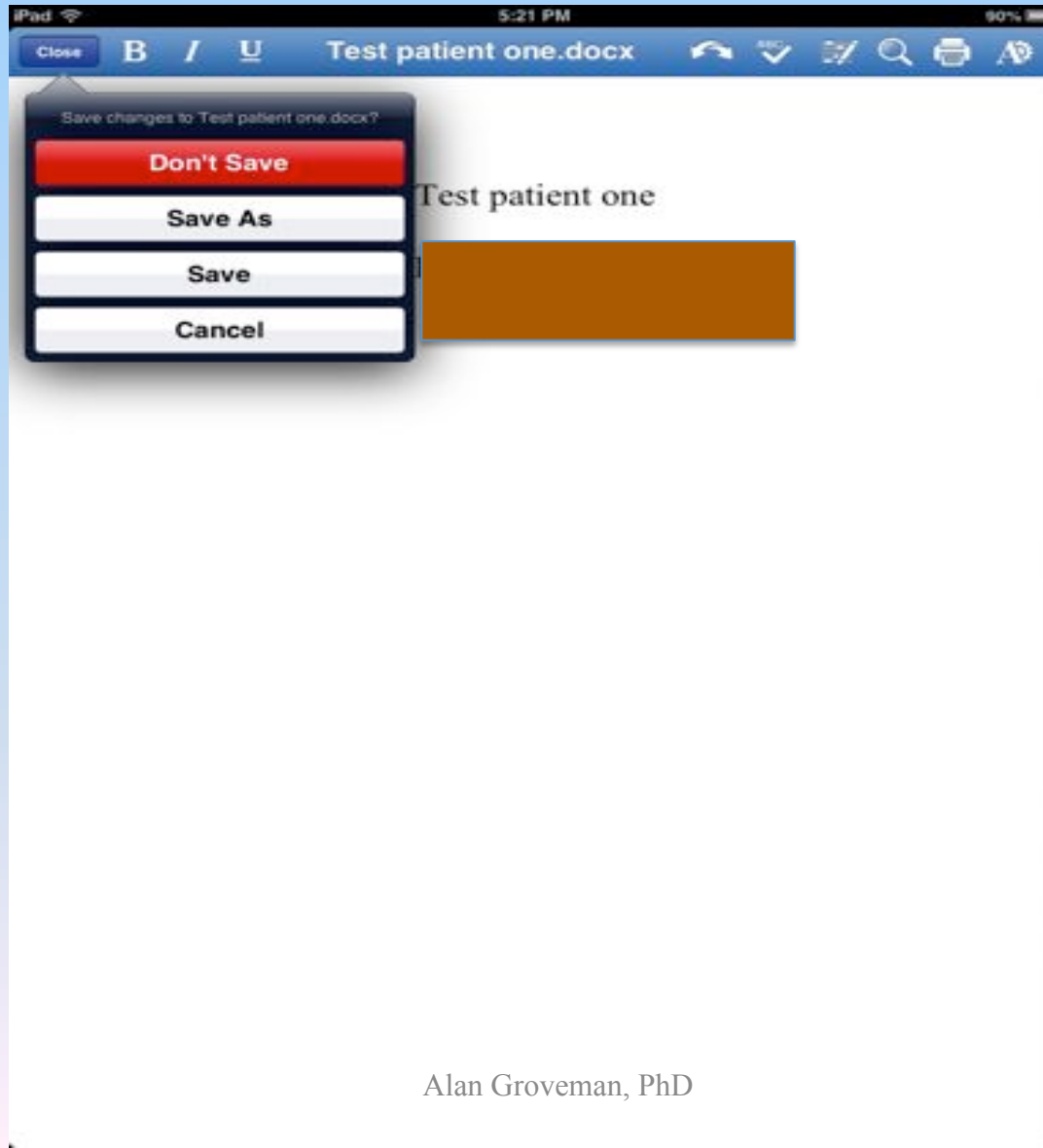
Implementing iPad Applications

7. Make any changes to the file that you want



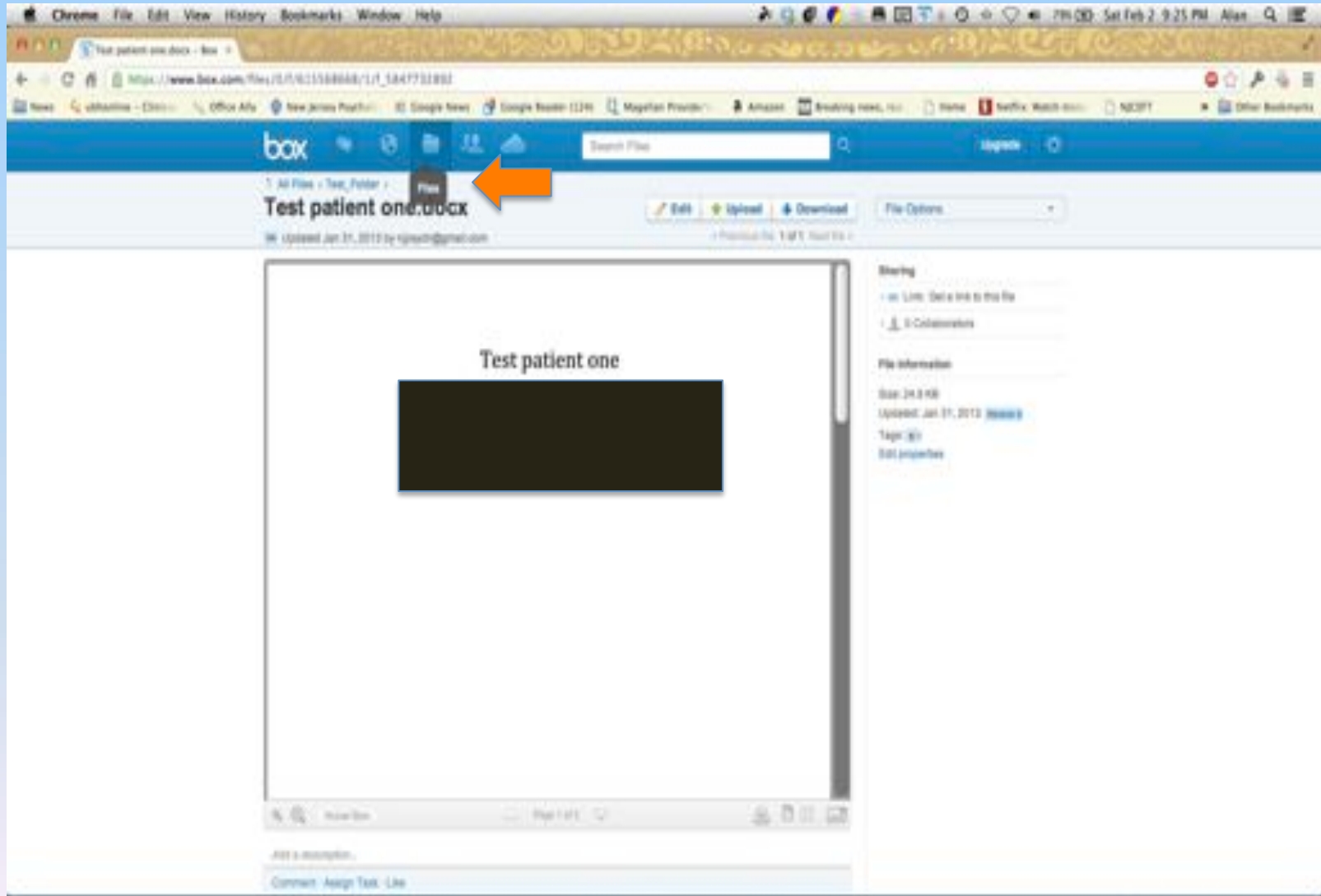
Implementing iPad Applications

8. Click on the close button and from the drop down menu select save. Your file, with the changes is now saved to the cloud and can be accessed by going to Box.com, logging in and clicking the folder icon



Implementing iPad Applications

9. After going to Box.com, signing in and accessing your Box Account click on the Folder icon and select a file. You can see the changes that were made on your iPad that are now synced to your Box Account



Office Ally Implementation

1. Go to www.officeally.com and click on the Enroll Now button.



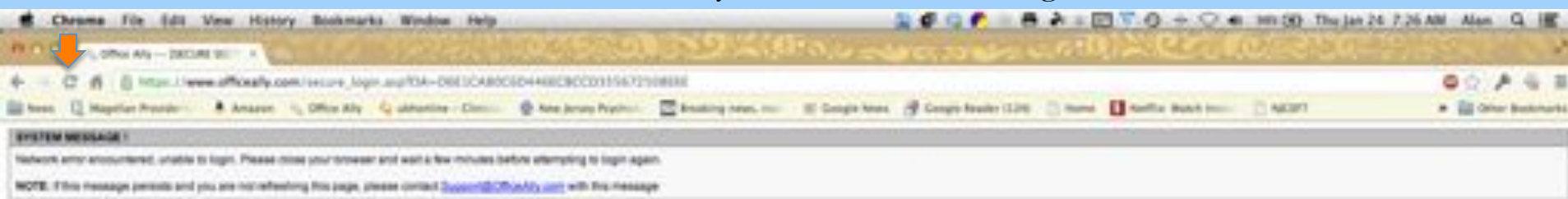
Office Ally Implementation

2. After filling out the Enroll Now information, click on the LOGIN button (1). enter your User Name and Password and click on the small Log in button (2)



Office Ally Implementation

3. If, for any reason, you see the System Message screen, click on the semi-circular refresh arrow on your web browser to go to the next screen



4. Once you are on the next screen click on the Online Claim Entry drop down menu and select HCFA Insert Claim



Office Ally Implementation

5. The screen below will appear. Click on the OA Payers button (1) and a Selection List screen will appear. In the blank space next to the Starts with drop down menu (2) type in the name of your patient's insurance co., click the search button on the right and then click on select next to the name of the carrier to choose that specific carrier. This will fully populate the Payer Name section of the HCFA form (3) that is required. Next fill out the HCFA 1500 form with your patient information and click the Update button at the bottom left corner of the screen

The screenshot shows the Office Ally website interface. At the top, there's a navigation bar with 'Office Ally' and 'Payers' buttons. Below this, a 'Selection List' window is open, displaying a table of payers. The table has columns for 'Payer Name', 'City', and 'State'. The first row is '1-ABC Dental Group' with 'NEW YORK' as the city and state. An orange arrow labeled '1' points to the 'OA Payers' button in the top right corner. Another orange arrow labeled '2' points to the 'Starts with' dropdown menu. A third orange arrow labeled '3' points to the 'Select' button next to the '1-ABC Dental Group' entry in the table. Below the table, there's a form for 'HEALTH INSURANCE CLAIM FORM' with various fields for patient and payer information.

Select	Payer ID	Payer Name	City	State
<input type="checkbox"/>	1-ABC	1-ABC Dental Group	NEW YORK	NEW YORK
<input type="checkbox"/>	1-DEF	1-DEF Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-GHI	1-GHI Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-JKL	1-JKL Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-MNO	1-MNO Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-PQR	1-PQR Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-STU	1-STU Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-VWX	1-VWX Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-YZ0	1-YZ0 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-123	1-123 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-456	1-456 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-789	1-789 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-012	1-012 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-345	1-345 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-678	1-678 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-901	1-901 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-234	1-234 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-567	1-567 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-890	1-890 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-111	1-111 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-222	1-222 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-333	1-333 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-444	1-444 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-555	1-555 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-666	1-666 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-777	1-777 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-888	1-888 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-999	1-999 Local Health Fund	NEW YORK	NEW YORK
<input type="checkbox"/>	1-000	1-000 Local Health Fund	NEW YORK	NEW YORK

Office Ally Implementation

6. . After you submit a claim, a screen similar to the one below (the patients claim ID, name and DOB, will be shown on your screen), will appear informing you that the claim submission was accepted. You will also receive a confirmation email

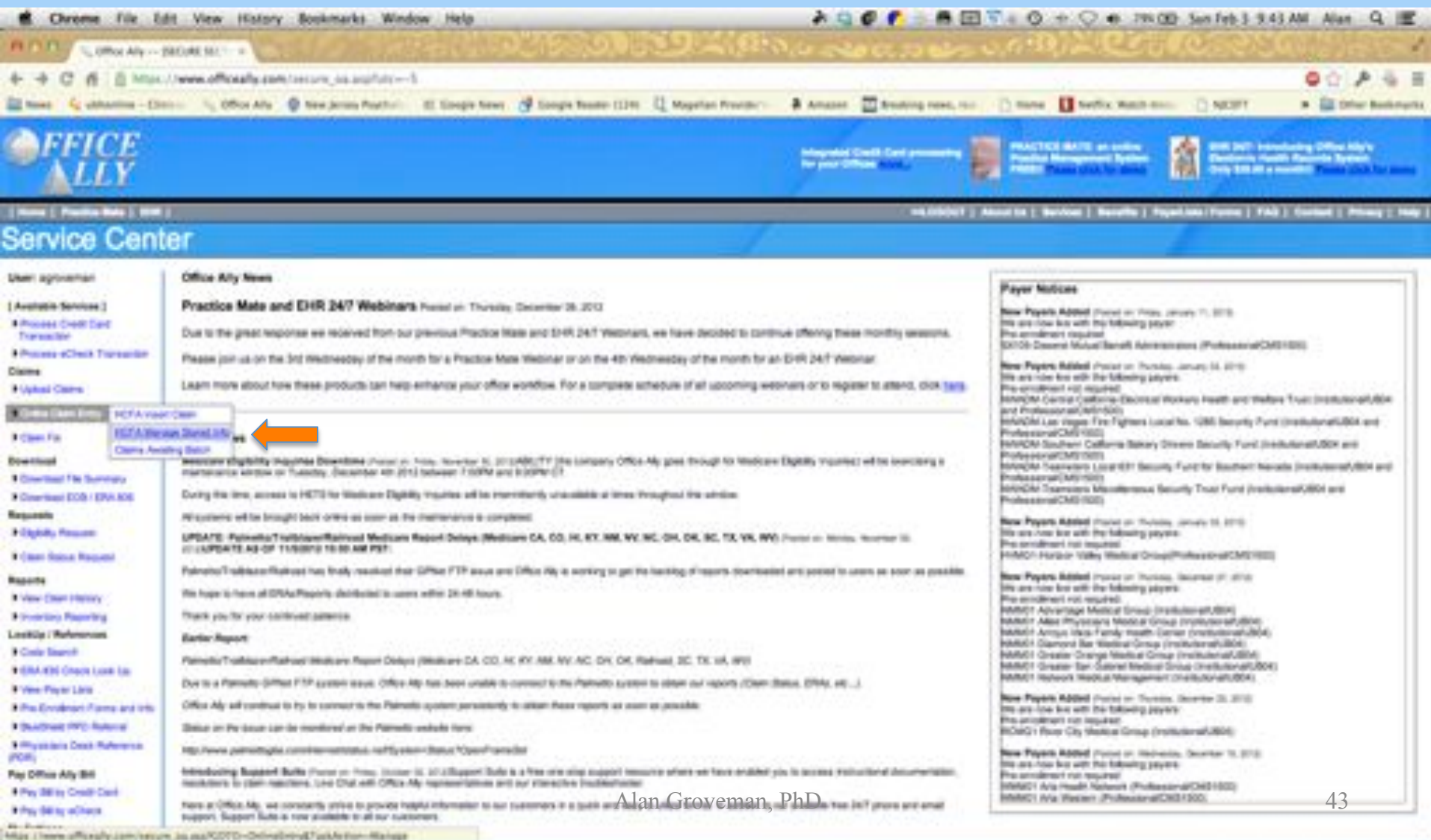
The screenshot shows the Office Ally web application interface. The browser address bar displays the URL: <https://www.officeally.com/secure/onlineentry/submit.asp?ClaimID=76202101&DT=8Map=121>. The page title is "Online Entry". The main content area displays a message: "Online Entry - Waiting to be Batched" and "Claim 76202101 Has Been Updated Successfully". Below this message is a table with columns: "Form Type", "Secondary", "Fee", "Current", and "Date". The table contains two rows, both with "HRA" in the "Form Type" column. The "Secondary" column has a dropdown menu open, showing "N" and "Y" options. The "Fee" column shows "0.00", the "Current" column shows "0.00", and the "Date" column shows "01/01/2018".

Form Type	Secondary	Fee	Current	Date
HRA	N	0.00	0.00	01/01/2018
HRA	N	0.00	0.00	01/01/2018

Alan Groveman, PhD

Office Ally Implementation

7. To access a patient's stored information and create a new (after the original) statement to submit, log into Office Ally, and from the Online Claim Entry drop-down menu click on HCFA Manage Stored info.



Office Ally Implementation

8. At the next screen click on the Stored Patients Select Patient (1) drop down menu, select your patient and click on the create New Claim button (2)

The screenshot shows the Office Ally web application interface. The main heading is "Online Entry". The left sidebar contains a navigation menu with categories like "Available Services", "Claims", "Download", "Requests", "Reports", "Lookup/Reference", "Pay Office Ally Bill", "My Settings", and "Change Password". The main content area is titled "Manage HCTA Stored Information". It contains a form with several rows, each representing a different type of stored information: "Stored Patients", "Stored Patients", "Stored Billing Providers", "Stored Referring Providers", "Stored Facilities", and "Stored Terminate". Each row has a dropdown menu for selection and buttons for "Edit", "Delete", and "Add". An orange arrow labeled "1" points to the "Select Patient (look for in)" dropdown menu in the "Stored Patients" row. At the bottom of the form, there is a text instruction: "To create a new claim using your stored information, please select from each of the pertinent categories then click 'Create New Claim'". An orange arrow labeled "2" points to the "Create New Claim" button.

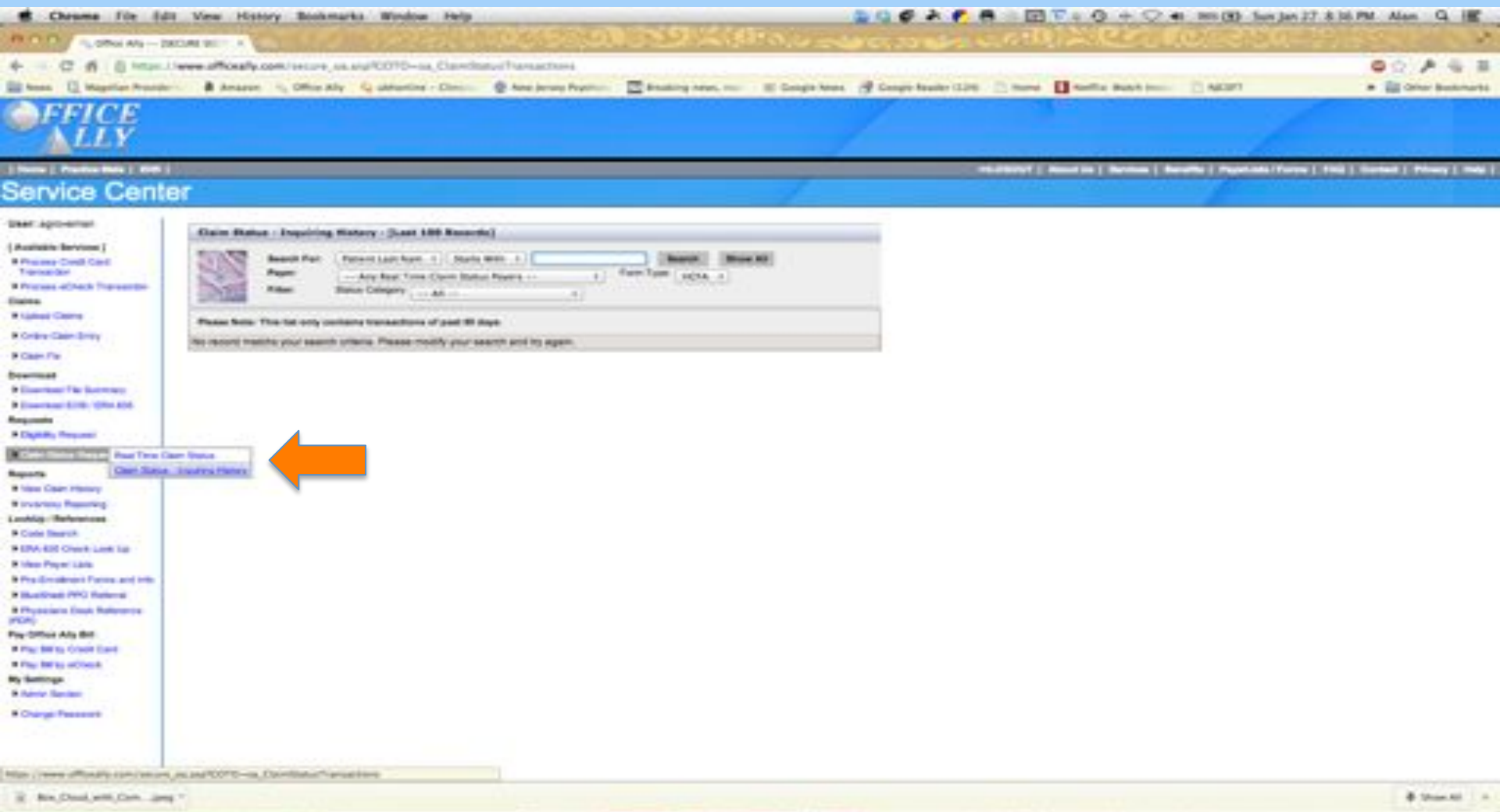
Office Ally Implementation

9. The next screen will show your patient's HCFA form populated with all information except diagnosis and dates of service. Add this information and as in step 5 click on the select button on the bottom left of the screen

The screenshot shows the 'Health Insurance Claims Form' on the official website. The form is titled 'HEALTH INSURANCE CLAIM FORM' and contains various sections for claimant information, policy details, and medical history. The form is divided into two main columns, A and B, with sub-sections 1 through 12. The form is currently in a 'Draft' state, as indicated by the 'Draft' button in the top right corner. The form is titled 'HEALTH INSURANCE CLAIM FORM' and contains various sections for claimant information, policy details, and medical history. The form is divided into two main columns, A and B, with sub-sections 1 through 12. The form is currently in a 'Draft' state, as indicated by the 'Draft' button in the top right corner.

Office Ally Implementation

10 To check on the status of a claim log into Office Ally and click on Claim Status Request and select Claim Status- Requiring History. Then follow the on screen instructions to view a patients claim history.





**Any Questions, or if you need help with any
of the implementations please email me at
njpsych@gmail.com**