



TheraScribe 5 Import Guide

Import Guide Version 1.0, 2014-03-13



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How To Use This Guide

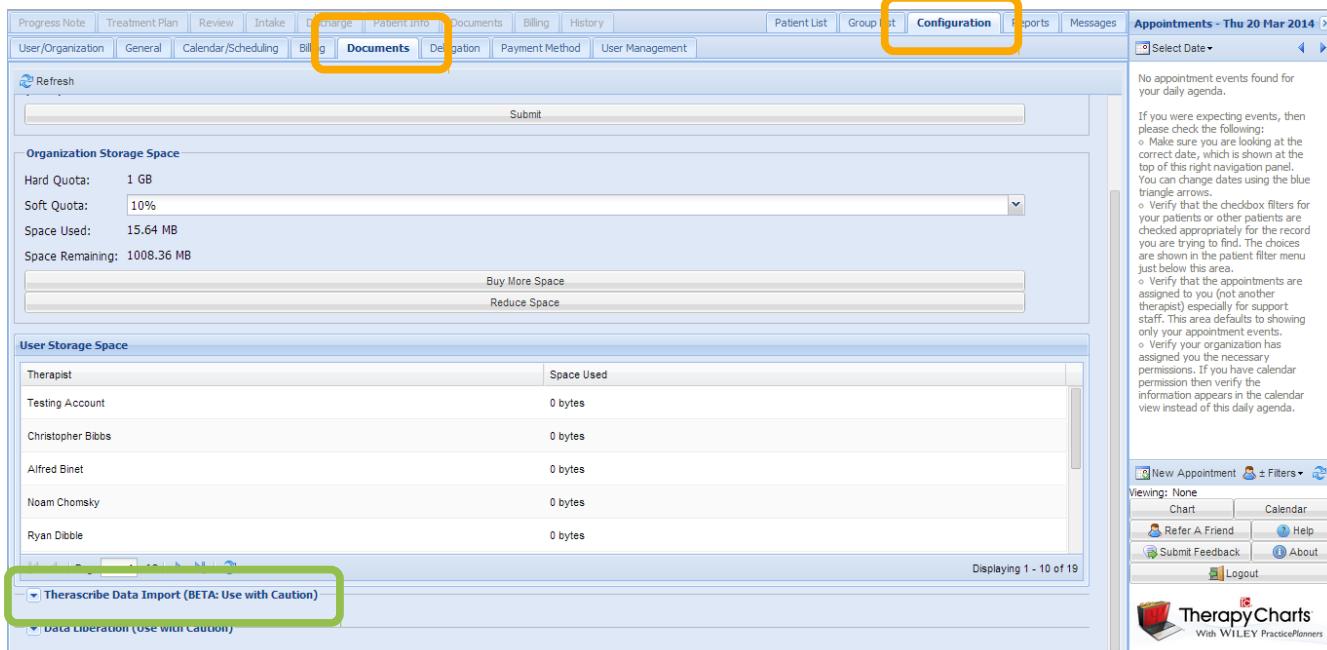
This guide will enable you to determine where each field in TheraScribe may be found in TherapyCharts after you have finished your import. The guide contains screen shots of every part of both the TheraScribe and TherapyCharts interface. Each element of the user interface is labeled with a code. For example, the patient first name field in TheraScribe (found in the Personal Data / Demographics area) is labeled "TS-PD-D-01". Inversely, in corresponding field in TherapyCharts (found in the Patient Info / General area) is labeled "TC-PI-G-01".

Finding TherapyCharts location of TheraScribe data

1. Use the TheraScribe screen shots to determine the code for the field. For example, the patient first name field is "TS-PD-D-01".
2. Look at the table in the section of this guide titled "TheraScribe to TherapyCharts Index". This table is sorted alphabetically by the TheraScribe code, and contains the corresponding code in the TherapyCharts interface as well as a short description of where the field is located. For example, the TherapyCharts code is for the TheraScribe field "TS-PD-D-01" is "TC-PI-G-01".
3. Use the description in the table to locate the TherapyCharts screen shot and find the field using the TherapyCharts code.

Starting Your Import

1. Login to TherapyCharts at <https://secure.therapycharts.com>
2. Click on the Configuration tab, and then the Documents sub tab (see screen shot below, circled in orange).
3. Expand the “TheraScribe Data Import” section at the bottom of the page (see screen shot, circled in green).
4. Check the Agreement check box to indicate that you understand the limitations of the data import.
5. Click the “Upload my TheraScribe Data”
6. Select your TheraScribe mdb file. This file is typically located in your Documents folder, but may be located in a different folder depending on how you have installed and configured TheraScribe.
7. Click the upload button.
8. TherapyCharts will process your mdb file and let you know once the import is complete. This process may take up to 2 weeks.



The screenshot shows the TherapyCharts Configuration page. At the top, there is a navigation bar with tabs: Progress Note, Treatment Plan, Review, Intake, Charge, Patient Info, Documents, Billing, History, Patient List, Group List, Configuration, Reports, and Messages. The Configuration tab is highlighted with an orange box. Below the navigation bar, there is a sub-navigation bar with tabs: User/Organization, General, Calendar/Scheduling, Billing, Documents (which is highlighted with an orange box), Delegation, Payment Method, and User Management. The main content area has a section titled "Organization Storage Space" with fields for Hard Quota (1 GB), Soft Quota (10%), Space Used (15.64 MB), and Space Remaining (1008.36 MB). Below this is a "User Storage Space" table showing storage usage for several therapists. At the bottom of the page, there is a section titled "TheraScribe Data Import (BETA: Use with Caution)" which is highlighted with a green box. The right side of the page includes a sidebar with appointment events and a navigation menu with links like New Appointment, Filters, Chart, Calendar, Refer A Friend, Help, Submit Feedback, About, and Logout. The TherapyCharts logo is at the bottom right.

Change Log

This area of the guide will detail any recent updates to the TheraScribe importer. TherapyCharts is continually adding features, and new features may allow for additional data to be imported from TheraScribe at a later date. The remainder of the guide will detail the behavior of only the most recent version of the importer.

Version 1.0 – March 2014

- Added initial set of fields for import

TheraScribe Interface

Personal Data - Demographics

File Go Help

Home Select Patient Add Patient

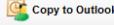
Personal Data

- Demographics
- Provider
- Insurance
- General Notes
- Attachments
- Episode Custom Fields
- HIPAA

Demographics

Patient:

| | | | |
|-------------|--|--------------------------------------|---|
| Client Info | First Name: TS-PD-D-01 | Last Name: TS-PD-D-03 | MI: TS-PD-D-06 |
| ID Number | TS-PD-D-02 | SSN: TS-PD-D-04 | Birth Date: 1/1/2000 TS-PD-D-05 |
| Address | Address 1: TS-PD-D-07 | Address 2: TS-PD-D-08 | City: TS-PD-D-09 State / Province: TS-PD-D-10 Postal Code: TS-PD-D-11 |
| Misc. | Home Phone: TS-PD-D-12 | Other Info | Referred By: TS-PD-D-19 |
| | Email Address: TS-PD-D-13 | Marital Status: TS-PD-D-20 | |
| | Military Rank: TS-PD-D-14 | Race: TS-PD-D-21 | |
| | Employer: TS-PD-D-15 | Gender: Male TS-PD-D-22 | |
| | Work Phone: TS-PD-D-16 | Setting: TS-PD-D-23 | |
| | Primary Care Physician: TS-PD-D-17 | Department: TS-PD-D-24 | |
| | Psychiatrist: TS-PD-D-18 | Treatment Start: 1/1/2000 TS-PD-D-25 | |
| | Is an Active Patient: <input type="checkbox"/> | Last Review: 1/1/2000 TS-PD-D-26 | |
| | Had Previous Treatment: <input type="checkbox"/> | Treatment End: 1/1/2000 TS-PD-D-27 | |

 Copy to Outlook

Personal Data - Provider

File Go Help

Home Select Patient Add Patient

Personal Data

- Demographics
- Provider
- Insurance
- General Notes
- Attachments
- Episode Custom Fields
- HIPAA

Provider

Patient:

| | | | |
|------------------|------------------|----------------------|------------------|
| Primary Provider | Name: TS-PD-P-01 | Treatment Team/Group | Name: TS-PD-P-03 |
| | Title: | | |
| | License (State): | | |
| | Degree: | | |
| Supervisor | Name: TS-PD-P-02 | Team Member | |
| | Title: | | |
| | License (State): | | |
| | Degree: | | |

Personal Data - Insurance

The screenshot shows the TheraScribe 5 software interface with the 'Personal Data' module selected in the sidebar. The main window is titled 'Insurance' and displays the following information:

- Patient:** (empty field)
- Insurance Carriers:** A table with columns: Name, Phone, Gatekeeper, Active. One row is listed: TS-PD-I-01.
- Authorized Sessions:** A table with columns: Auth Date, # Sessions, Start Date, End Date, Authorization #. One row is listed: TS-PD-I-02.
- Sessions:**
 - Total Sessions Authorized: TS-PD-I-03
 - Sessions Used: 5 TS-PD-I-04
 - Remaining Sessions: (empty field)

Buttons for 'Add' and 'Delete' are located in the top right of the 'Insurance' window.

Personal Data - General Notes

The screenshot shows the TheraScribe 5 software interface with the 'Personal Data' module selected in the sidebar. The main window is titled 'General Notes' and displays the following information:

- Patient:** (empty field)
- General Notes:** A rich text editor window with a toolbar. One note is listed: TS-PD-GN-01.
- Caution:** A message at the bottom states: 'Caution: HIPAA regulations stipulates that protected health information (PHI) be treated in a confidential manner and that release of this information requires proper client authorization. Psychotherapy Notes information should be entered into the Progress section of TheraScribe where it can be accessed by only the primary therapist.'

Personal Data - Attachments

The screenshot shows the TheraScribe software interface. The top menu bar includes 'File', 'Go', and 'Help'. Below the menu are 'Home', 'Select Patient', and 'Add Patient' buttons. The left sidebar has a 'Personal Data' section with icons for Demographics, Provider, Insurance, General Notes, Attachments (which is selected and highlighted in blue), Episode Custom Fields, and HIPAA. Below this are sections for 'Assessment', 'Treatment Plan', 'Progress', 'Prognosis / Discharge', 'Appointment Scheduler', and 'Reports'. At the bottom of the sidebar are two small icons. The main content area is titled 'Attachments' and shows a table with one row. The row contains 'TS-PD-A-01' in the 'Description' column, 'TS-PD-A-01' in the 'File Type' column, 'TS-PD-A-01' in the 'File Name' column, and 'TS-PD-A-01' in the 'File Size' column. To the right of the table are buttons for 'Add', 'Delete', 'Open File', and 'Save As'. A question mark icon is in the top right corner of the content area. A small note at the bottom of the content area states: 'Caution: HIPAA regulations stipulates that protected health information (PHI) be treated in a confidential manner and that release of this information requires proper client authorization. Psychotherapy Notes information should be entered into the Progress section of TheraScribe where it can be accessed by only the primary therapist.'

Personal Data - Episode Custom Fields

The screenshot shows the TheraScribe software interface. The top menu bar includes 'File', 'Go', and 'Help'. Below the menu are 'Home', 'Select Patient', and 'Add Patient' buttons. The left sidebar has a 'Personal Data' section with icons for Demographics, Provider, Insurance, General Notes, Attachments, Episode Custom Fields (which is selected and highlighted in blue), and HIPAA. Below this are sections for 'Assessment', 'Treatment Plan', 'Progress', 'Prognosis / Discharge', 'Appointment Scheduler', and 'Reports'. At the bottom of the sidebar are two small icons. The main content area is titled 'Episode Custom Fields' and shows two input fields. The first field is 'Minimum Sessions Required' with the value '6.000' and 'TS-PD-ECF-01' highlighted in yellow. The second field is 'Projected Start Date' with the value '1/1/2000' and 'TS-PD-ECF-02' highlighted in yellow. A question mark icon is in the top right corner of the content area.

Personal Data – HIPAA

File Go Help

Home Select Patient Add Patient

Personal Data

HIPAA

Patient:

Patient Privacy Notice

Patient was provided PHI Privacy Notice TS-PD-HP-01

Patient Signed PHI Privacy Acknowledgment TS-PD-HP-02

Patient Has Not Signed but Received Notice TS-PD-HP-03

Log of Patient Record Access

View Access Log

Disclosure Authorizations

| Date | Purpose | Information Disclosed | To Whom | Authorization On File | Agency | Address | City | State | Postal Code |
|------|---------|-----------------------|---------|-----------------------|--------|---------|------|-------|-------------|
| | | TS-PD-HP-04 | | | | | | | |

Add Delete Edit

Requested Amendments

| Request Date | Data Section | Approved | Denial Reason | Person Requesting | Person Approving/Denying | Approve/Deny Date |
|--------------|--------------|----------|---------------|-------------------|--------------------------|-------------------|
| | | | | | | TS-PD-HP-05 |

Add Delete

Personal Data Assessment Treatment Plan Progress Prognosis / Discharge Appointment Scheduler Reports

TS-PD-HP-01 TS-PD-HP-02 TS-PD-HP-03 TS-PD-HP-04 TS-PD-HP-05 TS-PD-HP-06 TS-PD-HP-07 TS-PD-HP-08 TS-PD-HP-09

Assessment – Psychosocial History

File Go Help

Home Select Patient Add Patient

Assessment

Psychosocial History

Strengths / Weaknesses

Assessments Given

Mental Status TS-A-PH-04

Recovery

Summary TS-A-PH-05

Personal Data Assessment Treatment Plan Progress Prognosis / Discharge Appointment Scheduler Reports

TS-A-PH-01 TS-A-PH-02 TS-A-PH-03 TS-A-PH-04 TS-A-PH-05 TS-A-PH-06 TS-A-PH-07 TS-A-PH-08 TS-A-PH-09

Psychosocial History

Patient:

Interviewer TS-A-PH-01 Date 3/6/2014 TS-A-PH-03

Person Interviewed Patient TS-A-PH-02

Family Developmental Substance Abuse Socio-Economic Psychiatric Medical TS-A-PH-09

TS-A-PH-06 TS-A-PH-07 TS-A-PH-08

Assessment – Strengths / Weaknesses

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes File, Go, and Help. Below the menu are buttons for Home, Select Patient, and Add Patient. The left sidebar has a tree view with Assessment (selected), Personal Data, Assessment, Treatment Plan, Progress, Prognosis / Discharge, Appointment Scheduler, and Reports. The main content area is titled 'Strengths / Weaknesses' and shows a 'Patient:' section. Under 'Strengths', there is a list with 'Description' and 'Capable of Independence' followed by a yellow box labeled 'TS-A-SW-01'. Under 'Weaknesses', there is a list with 'Description' and 'Irresponsible' followed by a yellow box labeled 'TS-A-SW-02'. There are 'Add' and 'Delete' buttons for each list.

Assessment – Assessments Given

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes File, Go, and Help. Below the menu are buttons for Home, Select Patient, and Add Patient. The left sidebar has a tree view with Assessment (selected), Personal Data, Assessment, Treatment Plan, Progress, Prognosis / Discharge, Appointment Scheduler, and Reports. The main content area is titled 'Assessments Given' and shows a 'Patient:' section. Under 'Instruments', there is a table with 'Date Tested', 'Instrument', 'Score', 'Data Source', and 'Treatment Phase'. The table has two rows: '3/6/2014 Clinical Interview Patient' and '3/6/2014 Family Assessment Patient'. A yellow box labeled 'TS-A-AG-01' is placed over the second row. Below the table is a 'Testing Details for Family Assessment' section with a rich text editor containing 'TS-A-AG-02'. At the bottom is an 'Interpretation Notes' section with a rich text editor containing 'TS-A-AG-03'. There are 'Add' and 'Delete' buttons for the instruments table.

Assessment – Mental Status – General Observations

File Go Help

Home Select Patient Add Patient

Assessment

- Psychosocial History
- Strengths / Weaknesses
- Assessments Given
- Mental Status**
- Recovery
- Summary

.....

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Y G

Mental Status

Patient: [redacted]

Select the Date of the Evaluation

Evaluation Date: 3/6/2014 Add Delete
3/17/2014

TS-A-MS-01

General Observations Thought Form/Content Risk Assessment Impression Summary

| | | | | | |
|------------------------|------------|----------------------------|--------------------|---------------------|------------|
| Presentation | Appearance | TS-A-MS-02 | Mental Functioning | Simple Calculations | TS-A-MS-12 |
| Mood | TS-A-MS-03 | Serial Sevens | TS-A-MS-13 | | |
| Attitude | TS-A-MS-04 | Immediate Memory | TS-A-MS-14 | | |
| Affect | TS-A-MS-05 | Remote Memory | TS-A-MS-15 | | |
| Speech | TS-A-MS-06 | General Knowledge | TS-A-MS-16 | | |
| Motor Activity | TS-A-MS-07 | Proverb Interpretation | TS-A-MS-17 | | |
| Orientation | TS-A-MS-08 | Similarities / Differences | TS-A-MS-18 | | |
| Higher Order Abilities | | | | | |
| Judgment | TS-A-MS-09 | Intelligence | TS-A-MS-11 | TS-A-MS-10 | TS-A-MS-09 |

Assessment – Mental Status – Thought Form/Control

File Go Help

Home Select Patient Add Patient

Assessment

- Psychosocial History
- Strengths / Weaknesses
- Assessments Given
- Mental Status**
- Recovery
- Summary

.....

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Y G

Mental Status

Patient: [redacted]

Select the Date of the Evaluation

Evaluation Date: 3/6/2014 Add Delete
3/17/2014

TS-A-MS-19

General Observations Thought Form/Content Risk Assessment Impression Summary

| | | | | | |
|--|------------|--|------------|---------------------------------------|------------|
| Thought Process | TS-A-MS-19 | Delusions | TS-A-MS-20 | Hallucinations | TS-A-MS-21 |
| <input type="checkbox"/> Logical and Organized | | <input type="checkbox"/> None Evident | | <input type="checkbox"/> None Evident | |
| <input type="checkbox"/> Illogical | | <input type="checkbox"/> Persecutory | | <input type="checkbox"/> Auditory | |
| <input type="checkbox"/> Loose Associations | | <input type="checkbox"/> Actions Controlled | | <input type="checkbox"/> Visual | |
| <input type="checkbox"/> Tangential | | <input type="checkbox"/> Thoughts Controlled | | <input type="checkbox"/> Olfactory | |
| <input type="checkbox"/> Disorganized | | <input type="checkbox"/> Grandiosity | | | |
| <input type="checkbox"/> Flight of Ideas | | <input type="checkbox"/> Bizarre | | | |
| <input type="checkbox"/> Blocking | | <input type="checkbox"/> Somatic | | | |
| <input type="checkbox"/> Obsessive | | <input type="checkbox"/> Infidelity | | | |

Assessment – Mental Status – Risk Assessment

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes File, Go, and Help. Below the menu is a toolbar with icons for Home, Select Patient, and Add Patient. The left sidebar has a tree view under the Assessment category, with Mental Status selected. The main content area is titled 'Mental Status' and shows a 'Patient:' section with an evaluation date of 3/6/2014. Below this are tabs for General Observations, Thought Form/Content, Risk Assessment (selected), and Impression Summary. The Risk Assessment section contains six rows, each with a category (Suicide, Violence, Child Abuse, Partner Abuse, Elder Abuse) and a corresponding risk score (TS-A-MS-22, TS-A-MS-23, TS-A-MS-24, TS-A-MS-25, TS-A-MS-26) highlighted with a yellow box.

Assessment – Mental Status – Impression Summary

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes File, Go, and Help. Below the menu is a toolbar with icons for Home, Select Patient, and Add Patient. The left sidebar has a tree view under the Assessment category, with Mental Status selected. The main content area is titled 'Mental Status' and shows a 'Patient:' section with an evaluation date of 3/17/2014. Below this are tabs for General Observations, Thought Form/Content, Risk Assessment, and Impression Summary (selected). The Impression Summary section contains a rich text editor toolbar and a text area containing the text 'TS-A-MS-27', which is highlighted with a yellow box.

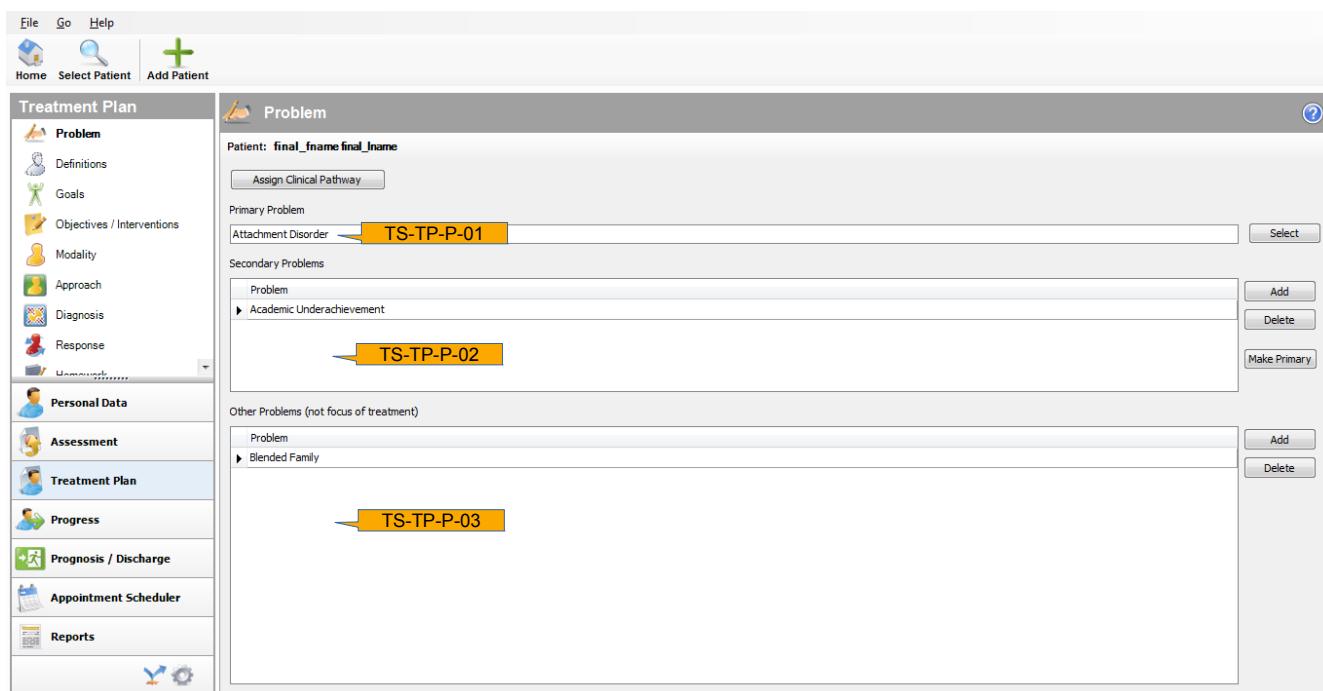
Assessment – Recovery

The screenshot shows the TheraScribe 5 software interface with the 'Assessment – Recovery' screen open. The left sidebar contains a navigation menu with icons for Home, Select Patient, Add Patient, and various clinical modules: Assessment, Personal Data, Assessment, Treatment Plan, Progress, Prognosis / Discharge, Appointment Scheduler, and Reports. The main window is titled 'Recovery' and displays the 'ASAM Patient Placement Criteria - 2R' form. The 'Patient' section shows a date of '3/17/2014' and buttons for 'Add' and 'Delete'. The 'Six Dimensions - Severity' section lists categories with dropdown menus: Acute Intoxication and/or Withdrawal Potential (TS-A-R-02), Biomedical Conditions & Complications (TS-A-R-03), Emotional / Behavioral or Cognitive Conditions & Complications (TS-A-R-04), Readiness to Change (TS-A-R-05), Relapse, Continued Use or Continued Problem Potential (TS-A-R-06), and Recovery / Living Environment (TS-A-R-07). The 'Level of Care Selected' dropdown is set to 'TS-A-R-08'. The 'Comment' section contains a rich text editor with the text 'TS-A-R-09'. The 'Stage of Change Assessment' section includes a table with columns for 'Problem Assessed', 'Date Assessed', and 'Stage of Change'. The first row shows 'TS-A-R-10' in the 'Problem Assessed' column. The 'Comment' section for this row contains the text 'TS-A-R-11'. The bottom of the window features a toolbar with icons for file operations and a help button.

Assessment – Summary

The screenshot shows the TheraScribe 5 software interface with the 'Assessment – Summary' screen open. The left sidebar is identical to the previous screenshot, showing the navigation menu and clinical modules. The main window is titled 'Summary' and displays the 'Assessment Summary' form. The 'Patient' section is empty. The 'Assessment Summary' section contains a rich text editor with the text 'TS-A-S-01'. The bottom of the window features a toolbar with icons for file operations and a help button.

Treatment Plan – Problem



Patient: final_fname final_lname

Assign Clinical Pathway

Primary Problem

Attachment Disorder **TS-TP-P-01** Select

Secondary Problems

Problem

▶ Academic Underachievement **TS-TP-P-02**

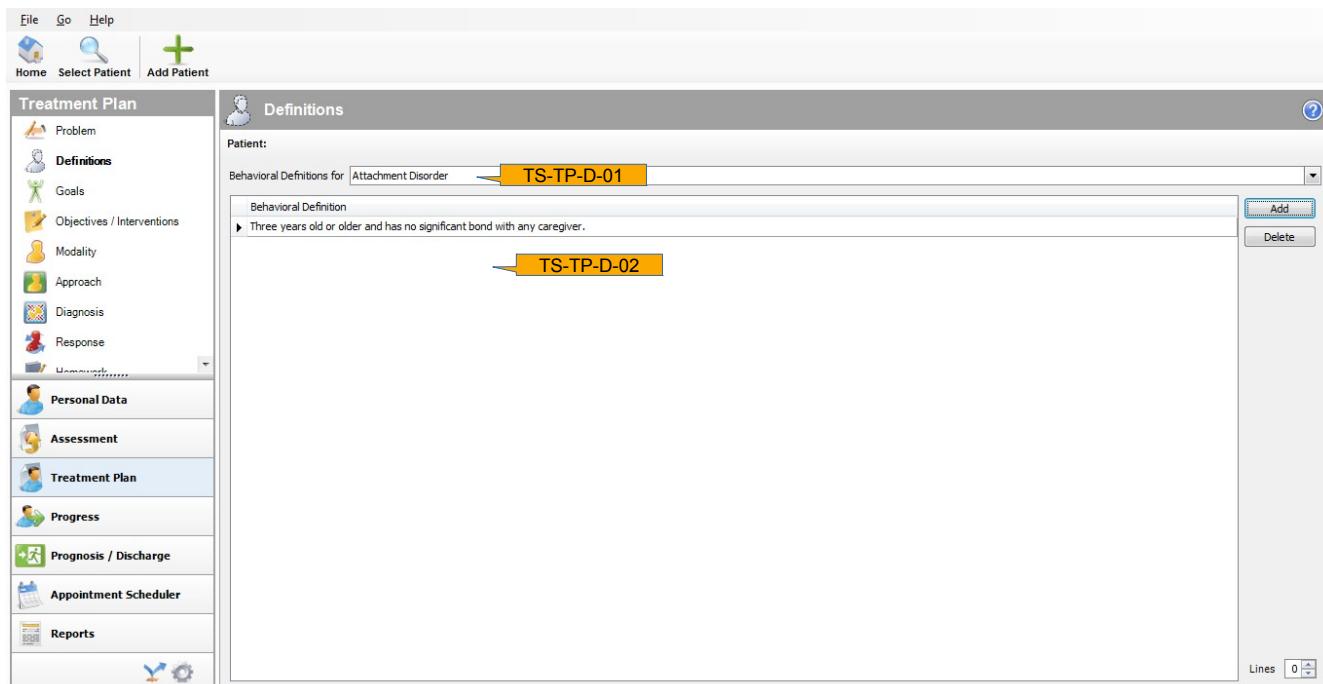
Other Problems (not focus of treatment)

Problem

▶ Blended Family **TS-TP-P-03**

Add Delete Make Primary

Treatment Plan – Definitions



Patient:

Behavioral Definitions for Attachment Disorder **TS-TP-D-01**

Behavioral Definition

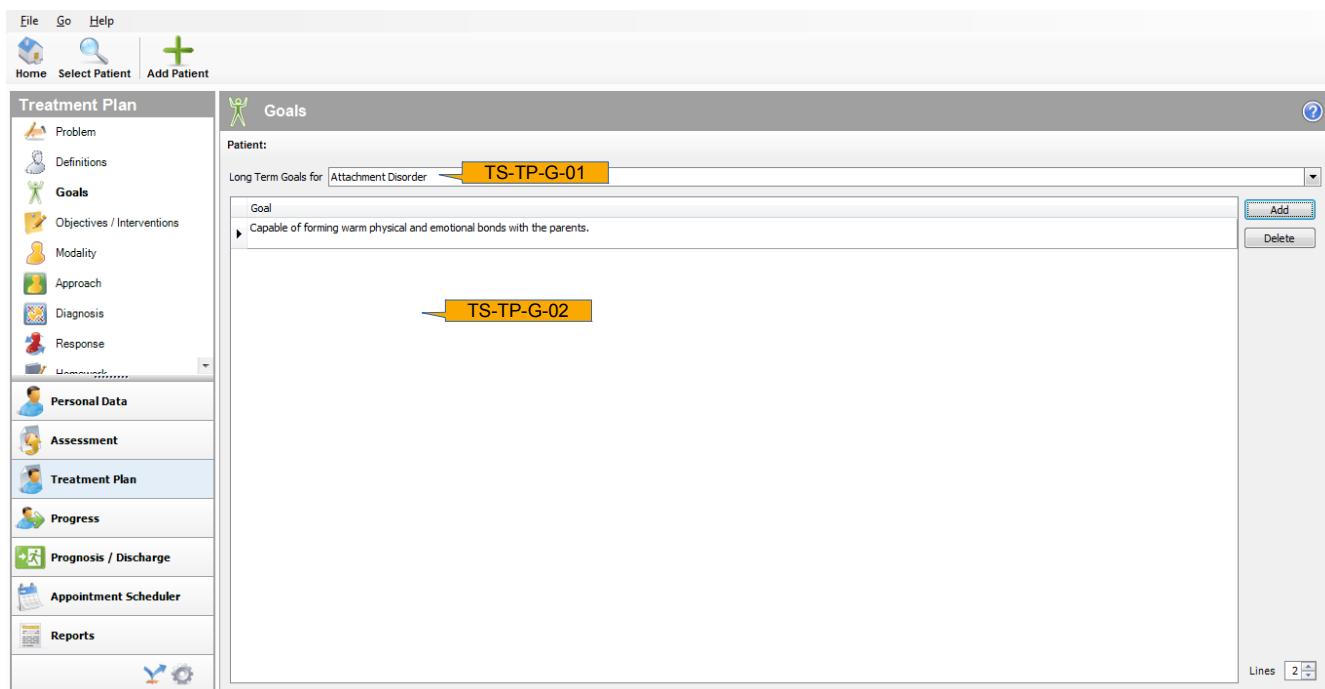
▶ Three years old or older and has no significant bond with any caregiver.

TS-TP-D-02

Add Delete

Lines 0

Treatment Plan – Goals



File Go Help

Home Select Patient Add Patient

Treatment Plan

- Problem
- Definitions
- Goals
- Objectives / Interventions
- Modality
- Approach
- Diagnosis
- Response
- Commands

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Help

Goals

Patient: Attachment Disorder

Long Term Goals for Attachment Disorder

TS-TP-G-01

Goal

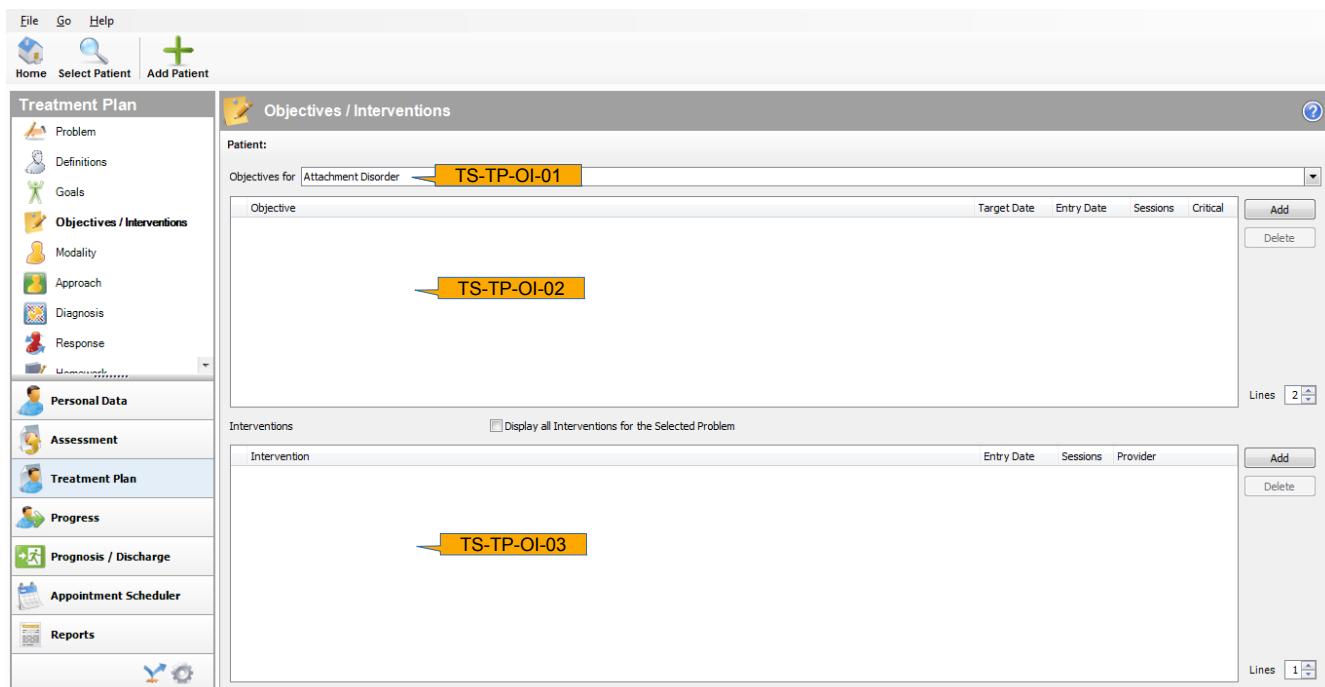
Capable of forming warm physical and emotional bonds with the parents.

TS-TP-G-02

Add Delete

Lines 2

Treatment Plan – Objectives / Interventions



File Go Help

Home Select Patient Add Patient

Treatment Plan

- Problem
- Definitions
- Goals
- Objectives / Interventions
- Modality
- Approach
- Diagnosis
- Response
- Commands

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Help

Objectives / Interventions

Patient: Attachment Disorder

Objectives for Attachment Disorder

TS-TP-OI-01

Objective

TS-TP-OI-02

Target Date Entry Date Sessions Critical

Add Delete

Lines 2

Interventions Display all Interventions for the Selected Problem

Intervention

TS-TP-OI-03

Entry Date Sessions Provider

Add Delete

Lines 1

Treatment Plan – Modality

File Go Help

Home Select Patient Add Patient

Treatment Plan

- Problem
- Definitions
- Goals
- Objectives / Interventions
- Modality**
- Approach
- Diagnosis
- Response
- Commands
- Personal Data
- Assessment
- Treatment Plan**
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports
- Help
- Exit

Modality

Patient:

Modalities

| Modality | CPT Code | Interval | Frequency | Provider |
|----------------------------|------------|----------|-----------|----------|
| ► Individual Psychotherapy | TS-TP-M-01 | | | |

Add Delete

Recommended Level of Care

| Date | Recommended Care Level | Least Restrictive Alternative | Patient Agrees | Level Available |
|------------|------------------------|-------------------------------|----------------|-----------------|
| ► 3/6/2014 | Inpatient | | | |

Add Delete

Modality Note

TS-TP-M-02

TS-TP-M-03

Treatment Plan – Approach

File Go Help

Home Select Patient Add Patient

Treatment Plan

- Problem
- Definitions
- Goals
- Objectives / Interventions
- Modality
- Approach**
- Diagnosis
- Response
- Commands
- Personal Data
- Assessment
- Treatment Plan**
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports
- Help
- Exit

Approach

Patient:

Approaches

| Description |
|--------------------|
| ► Insight Oriented |

Add Delete

Approach Note

TS-TP-A-01

TS-TP-A-02

Medications Prescribed

| Name | Dosage | Start Date | End Date | Prescribed by | Frequency |
|------------|--------|------------|----------|---------------|-----------|
| ► Concerta | | | | | |

Add Delete

Medication Note for

TS-TP-A-03

TS-TP-A-04

Treatment Plan – Diagnosis

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes 'File', 'Go', and 'Help'. Below the menu is a toolbar with icons for 'Home', 'Select Patient', and 'Add Patient'. The main window has a left sidebar titled 'Treatment Plan' with icons for Problem, Definitions, Goals, Objectives / Interventions, Modality, Approach, Diagnosis, Response, and a 'Definitions' section. The main content area is titled 'Definitions' and shows a list of behavioral definitions for a patient with the ID 'TS-TP-DG-01'. The first definition is: 'Three years old or older and has no significant bond with any caregiver.' and is assigned the ID 'TS-TP-D-02'. There are 'Add' and 'Delete' buttons on the right, and a 'Lines' counter at the bottom right.

Treatment Plan – Response

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes 'File', 'Go', and 'Help'. Below the menu is a toolbar with icons for 'Home', 'Select Patient', and 'Add Patient'. The main window has a left sidebar titled 'Treatment Plan' with icons for Problem, Definitions, Goals, Objectives / Interventions, Modality, Approach, Diagnosis, Response, and a 'Response' section. The main content area is titled 'Response' and shows a list of responses to a treatment plan for a patient with the ID 'TS-TP-R-01'. The first response is: 'Significant Other's Response to Treatment Plan' and is assigned the ID 'TS-TP-R-02'. There are scroll bars on the right side of the response area.

Treatment Plan – Homework

File Go Help

Home Select Patient Add Patient

Treatment Plan

- Definitions
- Goals
- Objectives / Interventions
- Modality
- Approach
- Diagnosis
- Response
- Homework**

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Help

Homework

Patient: Attachment Disorder TS-TP-H-01

Objectives

| Objective | Target Date |
|------------|-------------|
| TS-TP-H-02 | |

Lines 2

Homework

| Title | Date Assigned | Provider | Actions |
|------------|---------------|----------|-------------------|
| TS-TP-H-03 | | | Add Delete Launch |

Goals of Exercise

Suggestions

TS-TP-H-04

TS-TP-H-05

Progress – Session Details

File Go Help

Home Select Patient Add Patient

Progress

- Session Details
- Progress Notes Planner
- Objective Rating
- Psychotherapy Notes
- Amendments
- Session Custom Fields

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Help

Session Details

Patient: TS-P-SD-01

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | |

Session Date 3/11/2014 Start Time 4:00 PM End Time 6:00 PM

Session # 5 Is Billable Duration 120 min

Provider TS-P-SD-05 Modality Individual Psychotherapy TS-P-SD-07

Progress Rating TS-P-SD-06

| Insurance | Remaining Sessions |
|-----------|--------------------|
| | TS-P-SD-08 |

Progress – Progress Notes Planner

File Go Help

Home Select Patient Add Patient

Progress

- Session Details
- Progress Notes Planner**
- Objective Rating
- Psychotherapy Notes
- Amendments
- Session Custom Fields

.....

- Personal Data
- Assessment
- Treatment Plan
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports
- Y G

Progress Notes Planner

Patient:

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | 3/11/2014 |

Add Delete Copy

Problems Focused on

Problem

TS-P-PNP-01

Add Delete

Presentations for

Presentation

TS-P-PNP-02

Add Delete Lines 1 ▲ ▼

Interventions for

Intervention

TS-P-PNP-03

Add Delete Lines 1 ▲ ▼

Progress – Objective Rating

File Go Help

Home Select Patient Add Patient

Progress

- Session Details
- Progress Notes Planner
- Objective Rating**
- Psychotherapy Notes
- Amendments
- Session Custom Fields

.....

- Personal Data
- Assessment
- Treatment Plan
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports
- Y G

Objective Rating

Patient:

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | 3/11/2014 |

Add Delete Copy

Problem (all) TS-P-OR-01

| Objective | Rating |
|---------------------------------|------------|
| Complete psychological testing. | TS-P-OR-02 |

Add Delete Lines 2 ▲ ▼

Progress – Psychotherapy Notes

File Go Help

Home Select Patient Add Patient

Progress

- Session Details
- Progress Notes Planner
- Objective Rating
- Psychotherapy Notes**
- Amendments
- Session Custom Fields

.....

- Personal Data
- Assessment
- Treatment Plan
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports

TS-P-PN-01

Psychotherapy Notes

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | 3/11/2014 |

Add Delete Copy

Progress – Amendments

File Go Help

Home Select Patient Add Patient

Progress

- Session Details
- Progress Notes Planner
- Objective Rating
- Psychotherapy Notes
- Amendments**
- Session Custom Fields

.....

- Personal Data
- Assessment
- Treatment Plan
- Progress
- Prognosis / Discharge
- Appointment Scheduler
- Reports

TS-P-A-01

Amendments

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | 3/11/2014 |

Add Delete Copy

Progress – Session Custom Fields

The screenshot shows the TheraScribe software interface. The top menu bar includes File, Go, and Help. The toolbar contains icons for Home, Select Patient, and Add Patient. The left sidebar under the Progress category includes Session Details, Progress Notes Planner, Objective Rating, Psychotherapy Notes, Amendments, and Session Custom Fields. The main content area is titled "Session Custom Fields" and shows a table of session data. The table has columns: Date, Start, End, Provider, and Lock Date. The data in the table is as follows:

| Date | Start | End | Provider | Lock Date |
|-----------|---------|---------|----------|-----------|
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/11/2014 | 4:00 PM | 6:00 PM | | 3/13/2014 |
| 3/6/2014 | 4:00 PM | 6:00 PM | | 3/11/2014 |

Buttons for Add, Delete, and Copy are located on the right side of the table.

Prognosis / Discharge – Prognosis Details

The screenshot shows the TheraScribe software interface. The top menu bar includes File, Go, and Help. The toolbar contains icons for Home, Select Patient, and Add Patient. The left sidebar under the Prognosis / Discharge category includes Prognosis Details and Discharge Details. The main content area is titled "Prognosis Details" and shows a table of prognosis data. The table has columns: Percent of Critical Objectives Required for Discharge, Projected Number of Sessions Before Treatment End, Projected Date of Treatment End, and Prognosis Rating of Successful Achievement of Goals. The data in the table is as follows:

| Percent of Critical Objectives Required for Discharge | Projected Number of Sessions Before Treatment End | Projected Date of Treatment End | Prognosis Rating of Successful Achievement of Goals |
|---|---|---------------------------------|---|
| 70% | TS-PD-PD-01 | TS-PD-PD-02 | TS-PD-PD-03 |
| | | 3/6/2014 | TS-PD-PD-04 |
| | | | Good |

A Rationale for Prognosis Rating section is present, containing the text "TS-PD-PD-05".

Prognosis / Discharge – Discharge Details

The screenshot shows the TheraScribe 5 software interface. The top menu bar includes File, Go, and Help. Below the menu are icons for Home, Select Patient, and Add Patient. The left sidebar has a tree view with Prognosis / Discharge selected, and under it, Personal Data, Assessment, Treatment Plan, Progress, and Reports are listed. The main window title is "Discharge Details". It shows a "Patient:" field and a "Discharge Criteria" section with a list box containing "Consistent abstinence from mood-altering illicit drugs or alcohol." with the value "TS-PD-DD-01". There are "Add" and "Delete" buttons. Below this are sections for Competency to Manage Self-Care, Competency to Manage Financial Resources, Follow-up Care, Referral Made to, Placement Recommendation, Vocational Plan, and Actual Treatment End Date, each with dropdown menus showing values like "TS-PD-DD-02" through "TS-PD-DD-08". At the bottom, there is an "Aftercare Plan / Discharge Summary" section with a rich text editor toolbar and a text area containing "TS-PD-DD-09".

TherapyCharts Interface

Progress Note

Progress Note Treatment Plan Review Intake Discharge Patient Info Documents Billing History Patient List Group List Configuration Reports Messages

New Save Draft Sign & Save Print

Version: 4 Creation Date: 2014-02-19 14:53:0500 TC-PN-00 Required Signatures: 1

Date

Start: TC-PN-01
Date:

End: TC-PN-02
Date:

Time

Start: TC-PN-03
Time:

End: TC-PN-04
Time:

Symptoms

| Symptom Name | Symptom Description | Symptom Status |
|--------------|---------------------|----------------|
| TC-PN-05 | No records. | |

This grid is empty because at the moment this note was created the corresponding grid on the most recent *signed and saved* treatment plan was also empty.

If you need to get your data into this grid:

1. Sign and Save this Progress Note (if it is not already signed and saved)
2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form
3. Sign and Save that Treatment Plan
4. Create a New Progress Note

That new treatment plan's data will then be pulled forward into the new progress note.

Progress Note

TC-PN-06

This field is for your formal note narrative. It prints on the progress note printout.

Process/Personal/Psychotherapy Note

TC-PN-07

This field does not print on the progress note printout.

Medication/Safety

| | | | |
|---------------|---|---|----------|
| Medication: | <input type="checkbox"/> Compliance | <input type="checkbox"/> Instructed to Contact Psychiatrist | TC-PN-08 |
| | <input type="checkbox"/> Non-Compliance | <input type="checkbox"/> N/A | |
| | <input type="checkbox"/> Side Effect | | |
| Safety: | <input type="checkbox"/> Suicidal | <input type="checkbox"/> None | TC-PN-09 |
| | <input type="checkbox"/> Homicidal | | |
| Current Risk: | <input type="radio"/> Low | <input type="radio"/> Moderate | TC-PN-10 |
| | | <input type="radio"/> High | |

Progress Note (continued)

| Medications | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|--|------------------------------------|--|--|---|--|---|--|---|--|--|-----------------------------|---|-----------------------------|-------------------------------|--|---|----------------------------------|--------------------------------------|-------------------------------|---|-------------------------------|--|--|---|--|--|
| <table border="1"><thead><tr><th>Medication Name</th><th>Dosage</th></tr></thead><tbody><tr><td colspan="2">No records. TC-PN-11</td></tr><tr><td colspan="2">This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty.</td></tr><tr><td colspan="2">If you need to get your data into this grid:</td></tr><tr><td colspan="2">1. Sign and Save this Progress Note (if it is not already signed and saved)</td></tr><tr><td colspan="2">2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form</td></tr><tr><td colspan="2">3. Sign and Save that Treatment Plan</td></tr><tr><td colspan="2">4. Create a New Progress Note</td></tr><tr><td colspan="2">That new treatment plans data will then be pulled forward into the new progress note.</td></tr></tbody></table> | Medication Name | Dosage | No records. TC-PN-11 | | This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty. | | If you need to get your data into this grid: | | 1. Sign and Save this Progress Note (if it is not already signed and saved) | | 2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form | | 3. Sign and Save that Treatment Plan | | 4. Create a New Progress Note | | That new treatment plans data will then be pulled forward into the new progress note. | | | | | | | | | | |
| Medication Name | Dosage | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No records. TC-PN-11 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty. | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If you need to get your data into this grid: | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Sign and Save this Progress Note (if it is not already signed and saved) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. Sign and Save that Treatment Plan | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4. Create a New Progress Note | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| That new treatment plans data will then be pulled forward into the new progress note. | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Objectives | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><thead><tr><th>Measurable Objective</th><th>Target Date</th><th>Progress</th></tr></thead><tbody><tr><td colspan="3">No records. TC-PN-12</td></tr><tr><td colspan="3">This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty.</td></tr><tr><td colspan="3">If you need to get your data into this grid:</td></tr><tr><td colspan="3">1. Sign and Save this Progress Note (if it is not already signed and saved)</td></tr><tr><td colspan="3">2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form</td></tr><tr><td colspan="3">3. Sign and Save that Treatment Plan</td></tr><tr><td colspan="3">4. Create a New Progress Note</td></tr><tr><td colspan="3">That new treatment plans data will then be pulled forward into the new progress note.</td></tr></tbody></table> | Measurable Objective | Target Date | Progress | No records. TC-PN-12 | | | This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty. | | | If you need to get your data into this grid: | | | 1. Sign and Save this Progress Note (if it is not already signed and saved) | | | 2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form | | | 3. Sign and Save that Treatment Plan | | | 4. Create a New Progress Note | | | That new treatment plans data will then be pulled forward into the new progress note. | | |
| Measurable Objective | Target Date | Progress | | | | | | | | | | | | | | | | | | | | | | | | | |
| No records. TC-PN-12 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| This grid is empty because at the moment this note was created the corresponding grid on the most recent <i>signed and saved</i> treatment plan was also empty. | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| If you need to get your data into this grid: | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. Sign and Save this Progress Note (if it is not already signed and saved) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. Create a Treatment Plan with the appropriate information in the corresponding grid on that form | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. Sign and Save that Treatment Plan | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 4. Create a New Progress Note | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| That new treatment plans data will then be pulled forward into the new progress note. | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Client response | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><tr><td>TC-PN-13</td><td>TC-PN-14</td></tr><tr><td><input checked="" type="radio"/> Full compliance</td><td><input type="radio"/> Partial compliance</td></tr><tr><td><input type="radio"/> Non-compliance</td><td></td></tr><tr><td>Service code</td><td></td></tr><tr><td>90791</td><td><input type="button" value="▼"/></td></tr><tr><td><input checked="" type="radio"/> CPT</td><td><input type="radio"/> Email</td><td><input type="radio"/> Consultation</td></tr><tr><td><input type="radio"/> HCPCS</td><td><input type="radio"/> Letter</td><td><input type="radio"/> Other</td></tr><tr><td><input type="radio"/> ICD</td><td><input type="radio"/> Phone Call</td><td></td></tr><tr><td><input type="radio"/> No Show</td><td><input type="radio"/> Cancel/Reschedule</td><td></td></tr></table> | TC-PN-13 | TC-PN-14 | <input checked="" type="radio"/> Full compliance | <input type="radio"/> Partial compliance | <input type="radio"/> Non-compliance | | Service code | | 90791 | <input type="button" value="▼"/> | <input checked="" type="radio"/> CPT | <input type="radio"/> Email | <input type="radio"/> Consultation | <input type="radio"/> HCPCS | <input type="radio"/> Letter | <input type="radio"/> Other | <input type="radio"/> ICD | <input type="radio"/> Phone Call | | <input type="radio"/> No Show | <input type="radio"/> Cancel/Reschedule | | | | | | |
| TC-PN-13 | TC-PN-14 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> Full compliance | <input type="radio"/> Partial compliance | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> Non-compliance | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Service code | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 90791 | <input type="button" value="▼"/> | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input checked="" type="radio"/> CPT | <input type="radio"/> Email | <input type="radio"/> Consultation | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> HCPCS | <input type="radio"/> Letter | <input type="radio"/> Other | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> ICD | <input type="radio"/> Phone Call | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="radio"/> No Show | <input type="radio"/> Cancel/Reschedule | | | | | | | | | | | | | | | | | | | | | | | | | | |

Treatment Plan

Progress Note Treatment Plan Review Intake Discharge Patient Info Documents Billing History Patient List Group List Configuration Reports Messages

New Save Draft Sign & Save Print Samuel Alito

Version: 2 Creation Date: 2014-01-21 14:33:0500 (Tue) Signed Date: n/a Required Signatures: 1

Client Abilities/Strengths

TC-TP-01

Client Treatment Preferences

TC-TP-02

Client Statement of Needs

TC-TP-03

Symptoms

Add Symptom Edit Symptom Remove Symptom

| Symptom Name | Symptom Description | Symptom Status |
|---|---------------------|----------------|
| No records. | | |
| To add records: o Use the add button above; or o Use the Wiley TreatmentPlanner, if it is available with your subscription. | | |
| This data will only be pulled forward to a progress note when that note is made <i>after</i> this treatment plan is signed and saved. | | |

TC-TP-04

Problems & Goals

Add Problem Edit Problem Remove Problem

| Goal Statement | Problem |
|----------------------|----------|
| 1 New Goal Statement | TC-TP-05 |
| New Description | |

TC-TP-05

Objectives

Add Objective Edit Objective Remove Objective

| Measurable Objective | Related Problem | Target Date | Modality | Frequency | Progress | Cognitive | Emotio... | Referral | Behav... | Psychodyn... | Interpersonal |
|----------------------|-----------------|--------------------|------------|------------|----------|-----------|-----------|----------|----------|--------------|---------------|
| 1 New objective | TC-TP-06 | New Goal Statement | 2014-02-26 | individual | Daily | 0 | | | | | |
| 2 New objective | | New Goal Statement | 2014-02-26 | individual | Daily | 0 | | | | | |
| 3 New objective | | New Goal Statement | 2014-02-26 | individual | Daily | 0 | | | | | |

TC-TP-06

Treatment Plan (continued)

Assessments

Add Assessment Edit Assessment Remove Assessment

| Assessment Name | Score | Details |
|--|-------|---|
| 1 Instrument 1 | 1234 | Source=Patient TreatmentPhase=Pre-Treatment |
| 2 Interpretation Notes | n/a | ... |
| 3 New Assessment | n/a | |
| 4 New Assessment | n/a | |
| 5 New Assessment | n/a | |
| 6 Testing Details for Psychosocial History | n/a | ... |

Diagnoses

Add Diagnosis Edit Diagnosis Remove Diagnosis

| Axis | Code (Name) | Open? | Signifier | Description / Comment |
|---|-------------|-------|-----------|-----------------------|
| No records. | | | | |
| 1 | TC-TP-08 | | | |
| To add records: o Use the add button above; or o Use the Wiley TreatmentPlanner, if it is available with your subscription. | | | | |
| This data will only be pulled forward to a progress note when that note is made <i>after</i> this treatment plan is signed and saved. | | | | |

Medications

Add Medication Edit Medication Remove Medication

| Medication Name | Dosage |
|-----------------|--------|
| TC-TP-09 | |

Treatment Level

TC-TP-10

Patient Participation

Patient has approved this treatment plan TC-TP-11

Conditions for Discharge

Achievement of treatment goals TC-TP-12

Other (specify):

Rationale

Yearly update Status change
 Life event Initial Treatment Plan TC-TP-13

Signatures & History

TC-TP-14

| First | Last | Credentials | Action | Date (Local) | Date (UTC) |
|-------|--------|-------------|---------|------------------------|---------------------------|
| Ryan | Dibble | | Created | 2014-01-21 14:33 (Tue) | 2014-01-21 19:33:26 +0000 |

Review

Progress Note Treatment Plan **Review** Intake Discharge Patient Info Documents Billing History Patient List Group List Configuration Reports Messages

New Save Draft Sign & Save Print

Version: 1 Creation Date: 2010-05-13 15:44 -0400 (Thu) Signed Date: n/a Required Signatures: 1

Client's Response to Therapy

| | | | | |
|---------------------------------|---|------------------------------------|---|---------|
| General Progress to Date: | <input checked="" type="radio"/> Excellent | <input type="radio"/> Satisfactory | <input type="radio"/> Poor | TC-R-01 |
| Appointments: | <input checked="" type="radio"/> On time | <input type="radio"/> Late | <input type="radio"/> Frequent no shows | TC-R-02 |
| Ability to Relate to Therapist: | <input checked="" type="radio"/> Satisfactory | <input type="radio"/> Hostile | <input type="radio"/> Overproductive speech | TC-R-03 |
| Resistance: | <input checked="" type="radio"/> None | <input type="radio"/> Fair amount | <input type="radio"/> Very resistant | TC-R-04 |
| Compliance with Treatment: | <input checked="" type="radio"/> None | <input type="radio"/> Fair amount | <input type="radio"/> Very compliant | TC-R-05 |
| Thought/Behavioral Change: | <input checked="" type="radio"/> Excellent | <input type="radio"/> Satisfactory | <input type="radio"/> Poor | TC-R-06 |
| Status of Symptoms: | <input checked="" type="radio"/> Improved | <input type="radio"/> Same | <input type="radio"/> Worsening | TC-R-07 |

New Target Dates Yes No TC-R-08
Needed:

Comments: TC-R-09

Save Draft

Intake

Progress Note Treatment Plan Review **Intake** Discharge Patient Info Documents Billing History Patient List Group List Configuration Reports Messages

New Save Draft Sign & Save Print Samuel Alito

Version: 1 Creation Date: 2010-05-13 15:47 TC-I-00 : n/a Required Signatures: 1

Name: TC-I-01

Presenting Problem TC-I-02

Symptoms TC-I-03

History of Problem TC-I-04

Recent Trigger TC-I-05

Marital and Family Information

Present family concerns/problems: TC-I-06

Strengths/resources in the family/friends: TC-I-07

Marital/sexual history patterns: TC-I-08

Family of Origin

Problems in family of origin: TC-I-09

Family background / ethnic factors: TC-I-10

No needs/concerns related to ethnicity reported when asked: TC-I-11

Education/vocation

Interpersonal concerns/problems: TC-I-12

Personal strengths: TC-I-13

Military/work problems/concerns: TC-I-14

Intake (continued)

| | | | | | |
|---|---|--|----------------|--|--|
| Leisure activities/daily functioning | | | | | |
| General: | <input checked="" type="radio"/> Decreased interest | <input type="radio"/> Impaired functioning | TC-I-15 | | |
| | <input type="radio"/> Too much time spent | <input type="radio"/> No change | | | |
| | <input type="radio"/> Gave up | | | | |
| Comments: | TC-I-16 | | | | |
| Legal status | | | | | |
| No legal problems: | <input checked="" type="checkbox"/> TC-I-17 | | | | |
| Comments: | TC-I-18 | | | | |
| Medical/Health/Nutritional concerns | | | | | |
| No problems: | <input type="checkbox"/> | TC-I-19 | | | Anorexia: <input type="checkbox"/> |
| Junk food: | <input type="checkbox"/> | | | | Bulimia: <input type="checkbox"/> |
| Health Problems: | | | | | |
| Substance use/abuse/dependence | | | | | |
| Increased tolerance over time: | <input type="checkbox"/> | TC-I-20 | | | Relationship problems related to use: <input type="checkbox"/> |
| Work problems related to use: | <input type="checkbox"/> | | | | Family history of: <input type="checkbox"/> |
| Further screening indicated: | <input type="checkbox"/> | | | | Drinks to intoxication # times per month: <input type="checkbox"/> |
| Referral indicated: | <input type="checkbox"/> | | | | Cravings/withdrawal symptoms: <input type="checkbox"/> |
| Comments: | TC-I-21 | | | | |
| Religion/spirituality | | | | | |
| Believes in God: | <input type="checkbox"/> | TC-I-22 | | | Non-believer: <input type="checkbox"/> |
| Believes in higher power: | <input type="checkbox"/> | | | | Unsure: <input type="checkbox"/> |
| Impact on therapy: | <input type="checkbox"/> | | | | No impact: <input type="checkbox"/> |

Intake (continued)

| Mental status | | | |
|---|---|--|--|
| General behavior: | <input type="checkbox"/> Cooperative <input type="checkbox"/> Passive <input type="checkbox"/> Withdrawn | <input type="checkbox"/> Dramatic <input type="checkbox"/> Restless <input type="checkbox"/> Hostile | <input type="checkbox"/> Anxious <input type="checkbox"/> Other |
| Attire: | <input type="checkbox"/> Appropriate <input type="checkbox"/> Seductive <input type="checkbox"/> Untidy | <input type="checkbox"/> Loud <input type="checkbox"/> Meticulous <input type="checkbox"/> Other | |
| Gait: | <input type="checkbox"/> Normal <input type="checkbox"/> Erect <input type="checkbox"/> Stooped | <input type="checkbox"/> Ataxic <input type="checkbox"/> Rigid <input type="checkbox"/> Shuffling | <input type="checkbox"/> Manneristic <input type="checkbox"/> Other |
| Motor activity: | <input type="checkbox"/> Normal <input type="checkbox"/> Agitated <input type="checkbox"/> Retarded | <input type="checkbox"/> Tremor <input type="checkbox"/> Tic <input type="checkbox"/> Mannerism | <input type="checkbox"/> Other |
| Stream of thought - Productivity: | <input type="checkbox"/> Spontaneous <input type="checkbox"/> Verbose | <input type="checkbox"/> Pressured speech <input type="checkbox"/> Unproductive | <input type="checkbox"/> Other |
| Stream of thought - Progression: | <input type="checkbox"/> Normal <input type="checkbox"/> Loose <input type="checkbox"/> Circumstantial <input type="checkbox"/> Perseveration | <input type="checkbox"/> Halting <input type="checkbox"/> Blocking <input type="checkbox"/> Incoherent <input type="checkbox"/> Fragmented | <input type="checkbox"/> Other |
| Stream of thought - Language: | <input type="checkbox"/> Normal <input type="checkbox"/> Baby-talk <input type="checkbox"/> Peculiar | <input type="checkbox"/> Expression <input type="checkbox"/> Stilted <input type="checkbox"/> Other | |
| Emotional tone and reactions - Mood: | <input type="checkbox"/> Normal <input type="checkbox"/> Indifferent <input type="checkbox"/> Fearful <input type="checkbox"/> Angry <input type="checkbox"/> Euphoric <input type="checkbox"/> Labile | <input type="checkbox"/> Shallow <input type="checkbox"/> Blunted <input type="checkbox"/> Flat <input type="checkbox"/> Composed <input type="checkbox"/> Anxious <input type="checkbox"/> Sad | <input type="checkbox"/> Tearful <input type="checkbox"/> Depressed <input type="checkbox"/> Other |
| Emotional tone and reactions - Affect: | <input type="checkbox"/> Appropriate <input type="checkbox"/> Inappropriate | <input type="checkbox"/> Other | |
| Mental trend/Content of thoughts - Perception: | <input type="checkbox"/> Normal <input type="checkbox"/> Auditory hallucination <input type="checkbox"/> Visual hallucination | <input type="checkbox"/> Delusions <input type="checkbox"/> Depersonalization <input type="checkbox"/> Hypochondriasis | <input type="checkbox"/> Other |
| Mental trend/Content of thoughts - Orientation: | <input type="checkbox"/> Normal <input type="checkbox"/> Disoriented to time | <input type="checkbox"/> Disoriented to place <input type="checkbox"/> Disoriented to person | <input type="checkbox"/> Other |
| Mental trend/Content of thoughts - Memory: | <input type="checkbox"/> Normal <input type="checkbox"/> Defective - remote | <input type="checkbox"/> Defective - recent <input type="checkbox"/> Defective - immediate | <input type="checkbox"/> Other |
| Mental trend/Content of thoughts - General knowledge: | <input type="checkbox"/> Consistent with education <input type="checkbox"/> Inconsistent | <input type="checkbox"/> Able to abstract <input type="checkbox"/> Concrete | <input type="checkbox"/> Other |
| Insight: | <input type="checkbox"/> Absent <input type="checkbox"/> Good | <input type="checkbox"/> Fair <input type="checkbox"/> Minimal | <input type="checkbox"/> Other |
| Judgment: | <input type="checkbox"/> Good <input type="checkbox"/> Fair | <input type="checkbox"/> Poor <input type="checkbox"/> Other | |
| Intelligence: | <input type="checkbox"/> High <input type="checkbox"/> Average | <input type="checkbox"/> Low <input type="checkbox"/> Retarded | <input type="checkbox"/> Other |
| Comments: | <input type="checkbox"/> TC-I-40 | | |
| Diagnostic Summary | | | |
| <input type="checkbox"/> TC-I-41 | | | |

Discharge

Progress Note Treatment Plan Review Intake **Discharge** Patient Info Documents Billing History Patient List Group List Configuration Reports Messages

New Save Draft Sign & Save Print

Version: 1 Creation Date: 2010-05-13 15:44:0400 (Thu) **TC-D-00** Required Signatures: 1

Rationale for Discharge

Rationale: Client met goals/No further services requested **TC-D-01**
 Client met most goals/No further services requested
 Client needs more intensive care/Referred elsewhere (specify)
 Client has not met goals/No further services requested
 Client has not met goals/Left treatment against therapist's advice
 Client has not met goals/Transfer for another provider to better meet needs of client
 Other (specify)

Prognosis at Discharge

Prognosis: Excellent **TC-D-02**
 Good
 Fair (specify)
 Poor (specify)

Source of Referral

Instructions and Recommendations

Client advised to contact this clinic if further services are needed Yes No Specify: **TC-D-04**

Client referred for further treatment Yes No Specify: **TC-D-05**

Client referred for medication management Yes No Specify: **TC-D-06**

Aftercare Plan

Names of medications

Referrals Made to Client

Suggested groups/readings

Save Draft

Patient Info – General

Progress Note Treatment Plan Review Intake Discharge **Patient Info** Documents Billing History Patient List Group List Configuration Reports Messages

General Insurance HIPAA Disclosure

Refresh Save

Instructions: Auto-Fill Note
When you are creating a new patient, IF any of the fields below appear already filled in with the previous patient data THEN your web brower has the auto-complete or auto-fill setting turned on. You should turn it off. See [Disable Auto Fill](#) in our knowledgebase and your web browser documentation for more information.

Personal Information

| | | |
|--|--|---|
| First Name: <input type="text" value="TC-PI-G-01"/> | Date of Birth: <input type="text" value="TC-PI-G-07"/> | Age: <input type="text"/> |
| Middle Names: <input type="text" value="TC-PI-G-02"/> | Sex: <input type="radio"/> Male <input type="radio"/> Female | <input type="text" value="TC-PI-G-08"/> |
| Last Name: <input type="text" value="TC-PI-G-03"/> | Relationship: <input type="text" value="Select"/> | <input type="text" value="TC-PI-G-09"/> |
| 90 Day Review <input type="text" value="2014-06-01"/> <input type="text" value="TC-PI-G-04"/> | Status: <input type="text" value="Select"/> | <input type="text" value="TC-PI-G-10"/> |
| Date: <input type="text"/> | Employment: <input type="text" value="Select"/> | Status: <input type="text"/> |
| Active: <input checked="" type="checkbox"/> <input type="text" value="TC-PI-G-05"/> | Government ID: <input type="text" value="TC-PI-G-11"/> | Therapist Name: <input type="text" value="TC-PI-G-12"/> |
| Locked: <input type="checkbox"/> | Tags: <input type="text" value="TC-PI-G-06"/> | |
| Tags are used to make searching for patients more efficient. Separate different tags with a space. | | |

Contact Information

| | |
|--|---|
| Address: <input type="text" value="TC-PI-G-13"/> | Phone Number: <input type="text" value="TC-PI-G-17"/> |
| City: <input type="text" value="TC-PI-G-14"/> | Secondary Phone Number: <input type="text" value="TC-PI-G-18"/> |
| State: <input type="text" value="Michigan"/> <input type="text" value="TC-PI-G-15"/> | E-mail Address: <input type="text" value="TC-PI-G-19"/> |
| Postal Code: <input type="text" value="TC-PI-G-16"/> | |

Additional Contact #1

| | |
|--|--|
| Name: <input type="text" value="TC-PI-G-20"/> | Phone Number: <input type="text" value="TC-PI-G-25"/> |
| Address: <input type="text" value="TC-PI-G-21"/> | E-mail Address: <input type="text" value="TC-PI-G-26"/> |
| City: <input type="text" value="TC-PI-G-22"/> | Relationship to Patient: <input type="text" value="TC-PI-G-27"/> |
| State: <input type="text" value="Select"/> <input type="text" value="TC-PI-G-23"/> | |
| Zip/Postal Code: <input type="text" value="TC-PI-G-24"/> | |

Additional Contact #2

| | |
|--|--|
| Name: <input type="text" value="TC-PI-G-28"/> | Phone Number: <input type="text" value="TC-PI-G-33"/> |
| Address: <input type="text" value="TC-PI-G-29"/> | E-mail Address: <input type="text" value="TC-PI-G-34"/> |
| City: <input type="text" value="TC-PI-G-30"/> | Relationship to Patient: <input type="text" value="TC-PI-G-35"/> |
| State: <input type="text" value="Select"/> <input type="text" value="TC-PI-G-31"/> | |
| Zip/Postal Code: <input type="text" value="TC-PI-G-32"/> | |

Patient Info – General (continued)

| |
|--|
| <input checked="" type="checkbox"/> Primary Care Physician |
| Name: <input type="text" value="TC-PI-G-36"/> |
| Address: <input type="text" value="TC-PI-G-37"/> |
| City: <input type="text" value="TC-PI-G-38"/> |
| State: <input type="text" value="Select a state"/> <input type="text" value="TC-PI-G-39"/> |
| Zip/Postal Code: <input type="text" value="TC-PI-G-40"/> |
| <input checked="" type="checkbox"/> Referral Source |
| Name: <input type="text" value="TC-PI-G-43"/> |
| Address: <input type="text" value="TC-PI-G-44"/> |
| City: <input type="text" value="TC-PI-G-45"/> |
| State: <input type="text" value="Select a state"/> <input type="text" value="TC-PI-G-46"/> |
| Zip/Postal Code: <input type="text" value="TC-PI-G-47"/> |
| <input type="checkbox"/> Billing Configuration |
| Invoice Creation: <input type="radio"/> Use configured system default <input type="radio"/> Do not auto-create invoices for this patient <input type="text" value="TC-PI-G-50"/> |
| Invoice Batching: <input type="radio"/> Use configured system default <input type="radio"/> Create one invoice per signed note <input type="radio"/> Batch by Day [00:00hrs-23:59hrs] <input type="radio"/> Batch by Week [Sun-Sat] <input type="radio"/> Batch by Month <input type="text" value="TC-PI-G-51"/> |
| Claim Creation: <input type="radio"/> Use configured system default <input type="radio"/> Do not auto-create claims for this patient |
| <p>Invoice batching will batch at the time the signature event takes place. When it does so it first looks for an existing invoice during the selected time. If it finds one then it adds the transaction to that existing invoice. If it does not find one then it creates a new invoice. (It does not retroactively apply batching based on appointment time because those invoice may have already been submitted.)</p> |
| <input type="button" value="Submit and Save"/> |

Patient Info – Insurance

Progress Note | Treatment Plan | Review | Intake | Discharge | **Patient Info** | Documents | Billing | History | Patient List | Group List | Configuration | Reports | Messages

General | **Insurance** | HIPAA | Disclosure | Refresh | Save

Primary Insurance

| | | | |
|-------------------------|------------|---------------------|------------|
| Insurance Name: | TC-PI-I-01 | Effective Date: | TC-PI-I-07 |
| Policy Holder: | TC-PI-I-02 | Authorization Code: | TC-PI-I-08 |
| From Date: | TC-PI-I-03 | Sessions: | TC-PI-I-09 |
| To Date: | TC-PI-I-04 | Yearly Maximum: | TC-PI-I-10 |
| Copay (\$): | TC-PI-I-05 | | |
| Claims Mailing Address: | TC-PI-I-06 | | |

Primary Insurance - Insurance Information

| | | | |
|-------------------|------------|---------------------------------|------------|
| Member ID Number: | TC-PI-I-11 | Employer's Name or School Name: | TC-PI-I-13 |
| Policy Number: | TC-PI-I-12 | Plan Name or Program Name: | TC-PI-I-14 |

Primary Insurance - Insured Personal Background

| | | | |
|---------------|------------|----------------------------------|---|
| First Name: | TC-PI-I-15 | Date of Birth: | TC-PI-I-18 |
| Middle Names: | TC-PI-I-16 | Sex: | <input type="radio"/> Male <input checked="" type="radio"/> Female |
| Last Name: | TC-PI-I-17 | Government ID: | TC-PI-I-20 |
| | | Patient Relationship to Insured: | <input type="radio"/> Self <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Other |
| | | TC-PI-I-21 | |

Primary Insurance - Insured Contact Information

| | | | |
|--------------|--|---------------|------------|
| Address: | TC-PI-I-22 | Phone Number: | TC-PI-I-26 |
| City: | TC-PI-I-23 | | |
| State: | Select a State <input type="button" value="TC-PI-I-24"/> | | |
| Postal Code: | TC-PI-I-25 | | |

Secondary Insurance

| | | | |
|-------------------------|------------|---------------------|------------|
| Insurance Name: | TC-PI-I-27 | Effective Date: | TC-PI-I-33 |
| Policy Holder: | TC-PI-I-28 | Authorization Code: | TC-PI-I-34 |
| From Date: | TC-PI-I-29 | Sessions: | TC-PI-I-35 |
| To Date: | TC-PI-I-30 | Yearly Maximum: | TC-PI-I-36 |
| Copay (\$): | TC-PI-I-31 | | |
| Claims Mailing Address: | TC-PI-I-32 | | |

Secondary Insurance - Insurance Information

| | | | |
|-------------------|------------|---------------------------------|------------|
| Member ID Number: | TC-PI-I-37 | Employer's Name or School Name: | TC-PI-I-39 |
| Policy Number: | TC-PI-I-38 | Plan Name or Program Name: | TC-PI-I-40 |

Secondary Insurance - Insured Personal Background

| | | | |
|---------------|------------|----------------------------------|---|
| First Name: | TC-PI-I-41 | Date of Birth: | TC-PI-I-44 |
| Middle Names: | TC-PI-I-42 | Sex: | <input type="radio"/> Male <input checked="" type="radio"/> Female |
| Last Name: | TC-PI-I-43 | Government ID: | TC-PI-I-46 |
| | | Patient Relationship to Insured: | <input type="radio"/> Self <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Other |
| | | TC-PI-I-47 | |

Secondary Insurance - Insured Contact Information

| | | | |
|--------------|--|---------------|------------|
| Address: | TC-PI-I-48 | Phone Number: | TC-PI-I-52 |
| City: | TC-PI-I-49 | | |
| State: | Select a State <input type="button" value="TC-PI-I-50"/> | | |
| Postal Code: | TC-PI-I-51 | | |

Patient Info - Insurance (continued)

| | |
|---|--|
| <input checked="" type="checkbox"/> Tertiary Insurance | |
| Insurance Name: | TC-PI-I-53 |
| Policy Holder: | TC-PI-I-54 |
| From Date: | TC-PI-I-55 |
| To Date: | TC-PI-I-56 |
| Copay (\$): | TC-PI-I-57 |
| Claims Mailing Address: | TC-PI-I-58 |
| Effective Date: | TC-PI-I-59 |
| Authorization Code: | TC-PI-I-60 |
| Sessions: | TC-PI-I-61 |
| Yearly Maximum: | TC-PI-I-62 |
| Tertiary Insurance - Insurance Information | |
| Member ID Number: | TC-PI-I-63 |
| Policy Number: | TC-PI-I-64 |
| Employer's Name or School Name: | TC-PI-I-65 |
| Plan Name or Program Name: | TC-PI-I-66 |
| Tertiary Insurance - Insured Personal Background | |
| First Name: | TC-PI-I-67 |
| Middle Names: | TC-PI-I-68 |
| Last Name: | TC-PI-I-69 |
| Date of Birth: | TC-PI-I-70 |
| Sex: | <input type="radio"/> Male <input checked="" type="radio"/> Female |
| Government ID: | TC-PI-I-72 |
| Patient | <input type="radio"/> Self |
| Relationship to Insured: | <input type="radio"/> Spouse <input checked="" type="radio"/> TC-PI-I-73 |
| Insured: | <input type="radio"/> Child <input type="radio"/> Other |
| Tertiary Insurance - Insured Contact Information | |
| Address: | TC-PI-I-74 |
| City: | TC-PI-I-75 |
| State: | Select <input type="button" value="TC-PI-I-76"/> |
| Postal Code: | TC-PI-I-77 |
| Phone Number: | TC-PI-I-78 |
| <input checked="" type="checkbox"/> Quaternary Insurance | |
| Insurance Name: | TC-PI-I-79 |
| Policy Holder: | TC-PI-I-80 |
| From Date: | TC-PI-I-81 |
| To Date: | TC-PI-I-82 |
| Copay (\$): | TC-PI-I-83 |
| Claims Mailing Address: | TC-PI-I-84 |
| Effective Date: | TC-PI-I-85 |
| Authorization Code: | TC-PI-I-86 |
| Sessions: | TC-PI-I-87 |
| Yearly Maximum: | TC-PI-I-88 |
| Employer's Name or School Name: | TC-PI-I-91 |
| Plan Name or Program Name: | TC-PI-I-92 |
| Quaternary Insurance - Insurance Information | |
| Member ID Number: | TC-PI-I-89 |
| Policy Number: | TC-PI-I-90 |
| First Name: | TC-PI-I-93 |
| Middle Names: | TC-PI-I-94 |
| Last Name: | TC-PI-I-95 |
| Date of Birth: | TC-PI-I-96 |
| Sex: | <input type="radio"/> Male <input checked="" type="radio"/> Female |
| Government ID: | TC-PI-I-98 |
| Patient | <input type="radio"/> Self |
| Relationship to Insured: | <input type="radio"/> Spouse <input checked="" type="radio"/> TC-PI-I-99 |
| Insured: | <input type="radio"/> Child <input type="radio"/> Other |
| Quaternary Insurance - Insured Contact Information | |
| Address: | TC-PI-I-100 |
| City: | TC-PI-I-101 |
| State: | Select <input type="button" value="TC-PI-I-102"/> |
| Postal Code: | TC-PI-I-103 |
| Phone Number: | TC-PI-I-104 |

Patient Info - HIPAA

Progress Note Treatment Plan Review Intake Discharge **Patient Info** Documents Billing History Patient List Group List Configuration Reports Messages

General Insurance **HIPAA** Disclosure

Refresh Save

Privacy Notice, Acknowledgements, and Consents

Notice: Patient has NOT been provided PHI Privacy Notice **TC-PI-HP-01**
 Patient has been provided PHI Privacy Notice
 Patient has been provided PHI Privacy Notice AND signed PHI Privacy Acknowledgement
 Patient has not signed acknowledgement, but receipt of form was witnessed

Consent: Primary Care Physician **TC-PI-HP-02** Psychiatrist
 School / College Employer
 Court Spouse / Partner
 Family / Parents Other

Consent Details: **TC-PI-HP-03**

Opt-Outs

Marketing: Patient has **NOT** opted-out of marketing communication use of PHI **TC-PI-HP-04**
 Patient has opted-out of marketing communication use of PHI

Fund Raising: Patient has **NOT** opted-out of fund raising use of PHI
 Patient has opted-out of fund raising use of PHI

Restriction Requests

Restriction: No Patient requested restriction **TC-PI-HP-05**
 Treatment limitation
 Payment/Billing limitation
 Health care operations limitation
 Family limitation
 Condition limitation
 Location limitation
 Other limitation
 All disclosure prohibited

Details: **TC-PI-HP-06**

Cancel Submit and Save

Patient Info – Disclosure

Progress Note Treatment Plan Review Intake Discharge **Patient Info** Documents Billing History Patient List Group List Configuration Reports Messages

General Insurance HIPAA **Disclosure**

New Disclosure Disclosure Accounting Rules Summary

| Date | Purpose | Information Discussed | Auth on File? | To Whom |
|------------|---------|-----------------------|---------------|---------|
| No records | | | | |
| TC-PI-D-01 | | | | |

Page 1 of 1 | No data to display

Documents

Progress Note Treatment Plan Review Intake Discharge Patient Info **Documents** Billing History Patient List Group List Configuration Reports Messages

Documents

| Patient Name | Therapist Name | Document Title | Description | Date | Size | Protected? | Download |
|--------------|----------------|----------------|-------------|------|------|------------|----------|
| TC-D-01 | | | | | | | |

Page 1 of 1 | No data to display | Search

TheraScribe to TherapyCharts Index

| TS Label Code | TC Label Code | Description |
|---------------|---------------|---|
| TS-PD-D-01 | TC-PI-G-01 | On Patient Info, General |
| TS-PD-D-02 | | Not currently imported |
| TS-PD-D-03 | TC-PI-G-03 | On Patient Info, General |
| TS-PD-D-04 | TC-PI-G-11 | Labeled 'Government ID' in TherapyCharts |
| TS-PD-D-05 | TC-PI-G-07 | On Patient Info, General |
| TS-PD-D-06 | TC-PI-G-02 | On Patient Info, General. Note: TherapyCharts stores the patient's entire middle name, but TheraScribe only stores a middle initial. |
| TS-PD-D-07 | TC-PI-G-13 | On Patient Info, General |
| TS-PD-D-08 | TC-PI-G-13 | On Patient Info, General. Note: TheraScribe has an 'Address 1' and Address 2 Fields, but TherapyCharts has only one Address field. Both address 1 and Address 2 are placed into the TherapyCharts Address field, separated by a comma. |
| TS-PD-D-09 | TC-PI-G-14 | On Patient Info, General |
| TS-PD-D-10 | TC-PI-G-15 | On Patient Info, General |
| TS-PD-D-11 | TC-PI-G-16 | On Patient Info, General |
| TS-PD-D-12 | TC-PI-G-17 | On Patient Info, General |
| TS-PD-D-13 | TC-PI-G-19 | On Patient Info, General |
| TS-PD-D-14 | | Not currently imported |
| TS-PD-D-15 | TC-PI-G-20 | On Patient Info, General. Note: TherapyCharts does not have a Employer field, but does have a set of fields for an 'Additional Contact #1'. |
| TS-PD-D-16 | TC-PI-G-18 | On Patient Info, General. Note: in TherapyCharts, this field is labeled 'Secondary Phone Number'. It is not explicitly a work phone number. |
| TS-PD-D-17 | TC-PI-G-36 | On Patient Info, General |
| TS-PD-D-18 | TC-PI-G-28 | On Patient Info, General. Note: TherapyCharts does not have a Psychiatrist field, but does have a set of fields for an 'Additional Contact #2'. |
| TS-PD-D-19 | TC-PI-G-43 | On Patient Info, General |
| TS-PD-D-20 | TC-PI-G-09 | On Patient Info, General |
| TS-PD-D-21 | | Not currently imported |
| TS-PD-D-22 | TC-PI-G-08 | On Patient Info, General |
| TS-PD-D-23 | TC-TP-07 | On Treatment Plan. Note: TherapyCharts does not have a Setting field. This value is stored as an assessment named 'Setting'. |
| TS-PD-D-24 | | Not currently imported |
| TS-PD-D-25 | TC-I-00 | On Intake |
| TS-PD-D-26 | | Not currently imported |
| TS-PD-D-27 | TC-D-00 | On Discharge |
| TS-PD-P-01 | TC-PI-G-12 | On Patient Info, General |
| TS-PD-P-02 | | Not currently imported |

| | | |
|--------------|-------------|--|
| TS-PD-P-03 | | Not currently imported |
| TS-PD-I-01 | | Not currently imported |
| TS-PD-I-02 | | Not currently imported |
| TS-PD-I-03 | | Not currently imported |
| TS-PD-I-04 | | Not currently imported |
| TS-PD-GN-01 | TC-D-01 | In Documents. Note: TherapyCharts does not have a long narrative field for general notes. This value is stored as memo named 'General Notes on %patient_name%' |
| TS-PD-A-01 | | Not currently imported |
| TS-PD-ECF-01 | TC-I-41 | On Intake. Note: TherapyCharts does not have a Minimum Sessions Required field. This value is included at the top of the Diagnostic Summary in sentence form. |
| TS-PD-ECF-02 | TC-I-41 | On Intake. Note: TherapyCharts does not have a Projected Start Date field. This value is included at the top of the Diagnostic Summary in sentence form. |
| TS-PD-HP-01 | TC-PI-HP-01 | On Patient Info, HIPAA. Note: TherapyCharts' equivalent HIPAA fields are stored somewhat differently. In addition to importing the TheraScribe data in the correct manner, a description of the specific settings is imported into the TherapyCharts field TC-PI-HP-03. |
| TS-PD-HP-02 | TC-PI-HP-01 | On Patient Info, HIPAA. Note: TherapyCharts' equivalent HIPAA fields are stored somewhat differently. In addition to importing the TheraScribe data in the correct manner, a description of the specific settings is imported into the TherapyCharts field TC-PI-HP-03. |
| TS-PD-HP-03 | TC-PI-HP-01 | On Patient Info, HIPAA. Note: TherapyCharts' equivalent HIPAA fields are stored somewhat differently. In addition to importing the TheraScribe data in the correct manner, a description of the specific settings is imported into the TherapyCharts field TC-PI-HP-03. |
| TS-PD-HP-04 | | Not currently imported |
| TS-PD-HP-05 | | Not currently imported |
| TS-A-PH-01 | | Not currently imported |
| TS-A-PH-02 | TC-I-01 | On Intake |
| TS-A-PH-03 | TC-I-00 | On Intake |
| TS-A-PH-04 | TC-I-09 | On Intake |
| TS-A-PH-05 | TC-I-16 | On Intake |
| TS-A-PH-06 | TC-I-21 | On Intake |
| TS-A-PH-07 | TC-I-06 | On Intake |
| TS-A-PH-08 | TC-I-04 | On Intake |
| TS-A-PH-09 | TC-I-19 | On Intake |
| TS-A-SW-01 | | Not currently imported |
| TS-A-SW-02 | | Not currently imported |
| TS-A-AG-01 | | Not currently imported |
| TS-A-AG-02 | | Not currently imported |
| TS-A-AG-03 | TC-TP-07 | On Treatment Plan, or Documents. If the interpretation note is short, then it is imported into an assessment on TC-TP-07. If the note is too long for this field, then it is created as a memo found in the Documents tab named 'Interpretation Note'. |

| | | |
|------------|---------|---|
| TS-A-MS-01 | TC-I-40 | On Intake |
| TS-A-MS-02 | TC-I-24 | On Intake |
| TS-A-MS-03 | TC-I-30 | On Intake |
| TS-A-MS-04 | TC-I-23 | On Intake |
| TS-A-MS-05 | TC-I-31 | On Intake |
| TS-A-MS-06 | TC-I-29 | On Intake |
| TS-A-MS-07 | TC-I-26 | On Intake |
| TS-A-MS-08 | TC-I-33 | On Intake |
| TS-A-MS-09 | TC-I-38 | On Intake |
| TS-A-MS-10 | TC-I-37 | On Intake |
| TS-A-MS-11 | TC-I-39 | On Intake |
| TS-A-MS-12 | TC-I-40 | On Intake. Note: TherapyCharts does not have a Simple Calculations field. This value is included in the comment field instead. |
| TS-A-MS-13 | TC-I-40 | On Intake. Note: TherapyCharts does not have a Serial Sevens field. This value is included in the comment field instead. |
| TS-A-MS-14 | TC-I-34 | On Intake. Note: TherapyCharts does not have separate remote/immediate memory fields. Both of these TheraScribe values are imported into the TherapyCharts "Mental trend/Content of thoughts – Memory" field in the free-form 'other' value. |
| TS-A-MS-15 | TC-I-34 | On Intake. Note: TherapyCharts does not have separate remote/immediate memory fields. Both of these TheraScribe values are imported into the TherapyCharts "Mental trend/Content of thoughts – Memory" field in the free-form 'other' value. |
| TS-A-MS-16 | TC-I-35 | On Intake |
| TS-A-MS-17 | TC-I-40 | On Intake. Note: TherapyCharts does not have a Proverb Interpretation field. This value is included in the comment field instead. |
| TS-A-MS-18 | TC-I-40 | On Intake. Note: TherapyCharts does not have a Similarities/Differences field. This value is included in the comment field instead. |
| TS-A-MS-19 | TC-I-28 | On Intake |
| TS-A-MS-20 | TC-I-32 | On Intake. Note: TherapyCharts does not have separate Delusions and Hallucinations fields. Both of these TheraScribe values are imported into the TherapyCharts "Mental trend/Content of thoughts – Perception" field. |
| TS-A-MS-21 | TC-I-32 | On Intake. Note: TherapyCharts does not have separate Delusions and Hallucinations fields. Both of these TheraScribe values are imported into the TherapyCharts "Mental trend/Content of thoughts – Perception" field. |
| TS-A-MS-22 | TC-D-01 | If any of the 3 Suicide risk assessment fields are set, then they are imported as a memo and may be found in the Documents tab. The memo is named "Suicide risk assessment on %EvaluationDate%" |
| TS-A-MS-23 | TC-D-01 | If any of the 3 Violence risk assessment fields are set, then they are imported as a memo and may be found in the Documents tab. The memo is named "Violence risk assessment on %EvaluationDate%" |
| TS-A-MS-24 | TC-D-01 | If any of the 3 Child Abuse risk assessment fields are set, then they are imported as a memo and may be found in the Documents tab. The memo is named "Child Abuse risk assessment on %EvaluationDate%" |

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| TS-A-MS-25 | TC-D-01 | If any of the 3 Partner Abuse risk assessment fields are set, then they are imported as a memo and may be found in the Documents tab. The memo is named "Partner Abuse risk assessment on %EvaluationDate%" |
| TS-A-MS-26 | TC-D-01 | If any of the 3 Elder Abuse risk assessment fields are set, then they are imported as a memo and may be found in the Documents tab. The memo is named "Elder Abuse risk assessment on %EvaluationDate%" |
| TS-A-MS-27 | TC-D-01 | This field is imported as a memo and may be found in the Documents tab. The name of the memo is "Assessment Impression Summary on %EvaluationDate%" |
| TS-TP-P-01 | TC-TP-05 | On Treatment Plan |
| TS-TP-P-02 | TC-TP-05 | On Treatment Plan |
| TS-TP-P-03 | TC-TP-05 | On Treatment Plan |
| TS-TP-D-01 | TC-TP-04 | On Treatment Plan |
| TS-TP-D-02 | TC-TP-04 | On Treatment Plan |
| TS-TP-G-01 | TC-TP-05 | On Treatment Plan |
| TS-TP-G-02 | TC-TP-05 | On Treatment Plan |
| TS-TP-OI-01 | TC-TP-06 | On Treatment Plan |
| TS-TP-OI-02 | TC-TP-06 | On Treatment Plan |
| TS-TP-OI-03 | TC-TP-06 | On Treatment Plan |
| TS-TP-M-01 | | Not currently imported |
| TS-TP-M-02 | | Not currently imported |
| TS-TP-M-03 | TC-D-01 | This field is imported as a memo and may be found in the Documents tab. The name of the memo is "Modality note on %PatientName%" |
| TS-TP-A-01 | | Not currently imported |
| TS-TP-A-02 | | This field is imported as a memo and may be found in the Documents tab. The name of the memo is "Approach note on %PatientName%" |
| TS-TP-A-03 | | Not currently imported |
| TS-TP-A-04 | | Not currently imported |
| TS-TP-DG-01 | TC-TP-08 | On Treatment Plan |
| TS-TP-DG-02 | TC-TP-08 | On Treatment Plan |
| TS-TP-R-01 | TC-R-09 | On Review. Note: TherapyCharts does not have separate Patient/Significant Other Response fields. Both of these TheraScribe values are imported into the TherapyCharts "Comments" field on the Review tab. |
| TS-TP-R-02 | TC-R-09 | On Review. Note: TherapyCharts does not have separate Patient/Significant Other Response fields. Both of these TheraScribe values are imported into the TherapyCharts "Comments" field on the Review tab. |
| TS-TP-H-01 | | Not currently imported |
| TS-TP-H-02 | | Not currently imported |
| TS-TP-H-03 | | Not currently imported |
| TS-TP-H-04 | | Not currently imported |
| TS-TP-H-05 | | Not currently imported |
| TS-P-SD-01 | TC-PN-00 | On Progress Note |

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| TS-P-SD-02 | TC-PN-01, TC-PN-02 | On Progress Note. Note: TherapyCharts has a separate Start/End Date field, allowing for a session to span multiple days. |
| TS-P-SD-03 | TC-PN-03 | On Progress Note |
| TS-P-SD-04 | TC-PN-04 | On Progress Note |
| TS-P-SD-05 | | Not currently imported |
| TS-P-SD-06 | | Not currently imported |
| TS-P-SD-07 | TC-PN-14 | On Progress Note |
| TS-P-SD-08 | | Not currently imported |
| TS-P-PNP-01 | TC-PN-12 | On Progress Note |
| TS-P-PNP-02 | | Not currently imported |
| TS-P-PNP-03 | TC-PN-12 | On Progress Note |
| TS-P-OR-01 | TC-PN-12 | On Progress Note |
| TS-P-OR-02 | | Not currently imported. Note: problems are imported into the Progress Note, but not the rating. |
| TS-P-PN-01 | TC-PN-06 | On Progress Note |
| TS-P-A-01 | TC-PN-06 | On Progress Note. Note: Amendments are currently included at the bottom of the Progress Note narrative field. |
| TS-PD-PD-01 | | Not currently imported |
| TS-PD-PD-02 | | Not currently imported |
| TS-PD-PD-03 | | Not currently imported |
| TS-PD-PD-04 | | Not currently imported |
| TS-PD-PD-05 | | Not currently imported |
| TS-PD-DD-01 | | Not currently imported |
| TS-PD-DD-02 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-03 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-04 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-05 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-06 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-07 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the |

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| | | pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-08 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |
| TS-PD-DD-09 | TC-D-07 | On Discharge. Note: TherapyCharts does not have separate fields for many of the pull downs on the TheraScribe Discharge Details area. The values for this area are imported into a single field named "Aftercare Plan" on the TherapyCharts Discharge tab. |

Frequently Asked Questions

Q: When a new version of the TheraScribe importer is released that allows for more data to be imported is completed, can my database be reprocessed?

A: Yes, with some possible caveats which will be detailed in the change log for the update (found on page 6 of this document).

Q: Can I import a second TheraScribe database? For instance, I am merging my practice with another practice.

A: Yes, this is supported.

Other questions and answers are available on the TherapyCharts knowledge base located at: <http://therapycharts.com/knowledgebase/Category:TheraScribeImport>