TherapyCharts

TheraScribe 5 Import Guide

Import Guide Version 1.0, 2014-03-13

TheraScribe

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How To Use This Guide

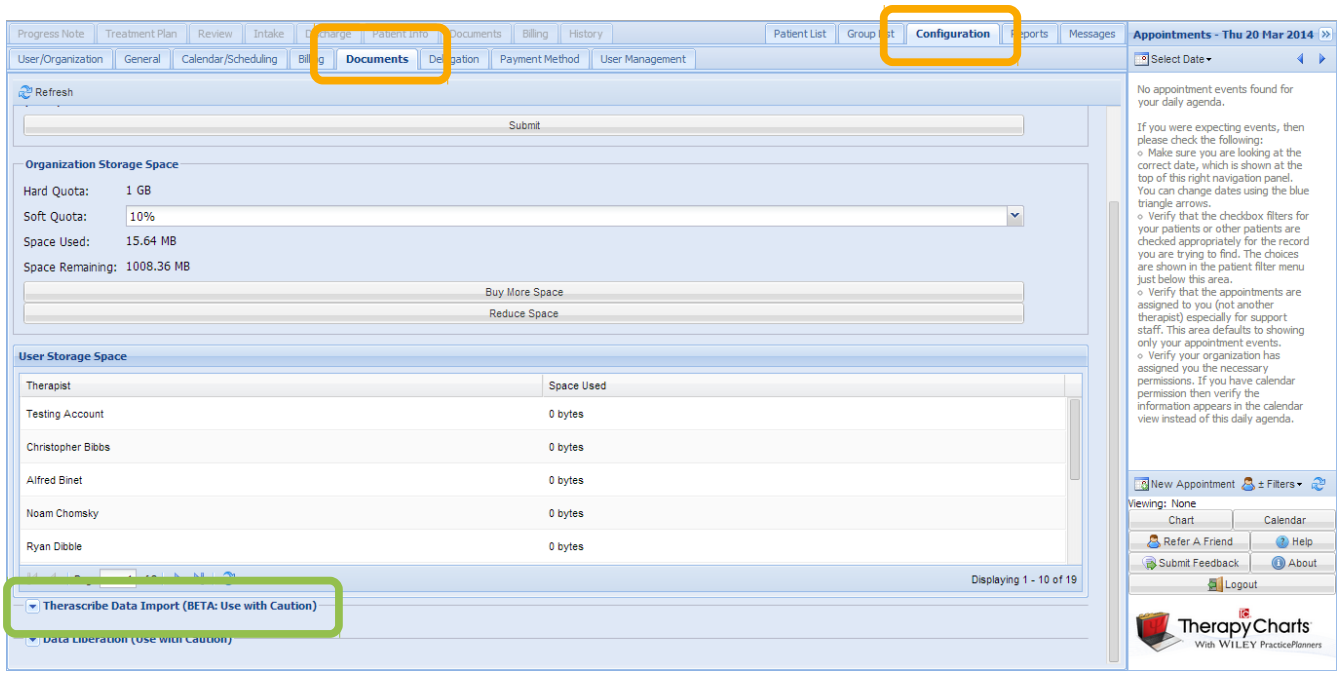
This guide will enable you to determine where each field in TheraScribe may be found in TherapyCharts after you have finished your import. The guide contains screen shots of every part of both the TheraScribe and TherapyCharts interface. Each element of the user interface is labeled with a code. For 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.



Change Log

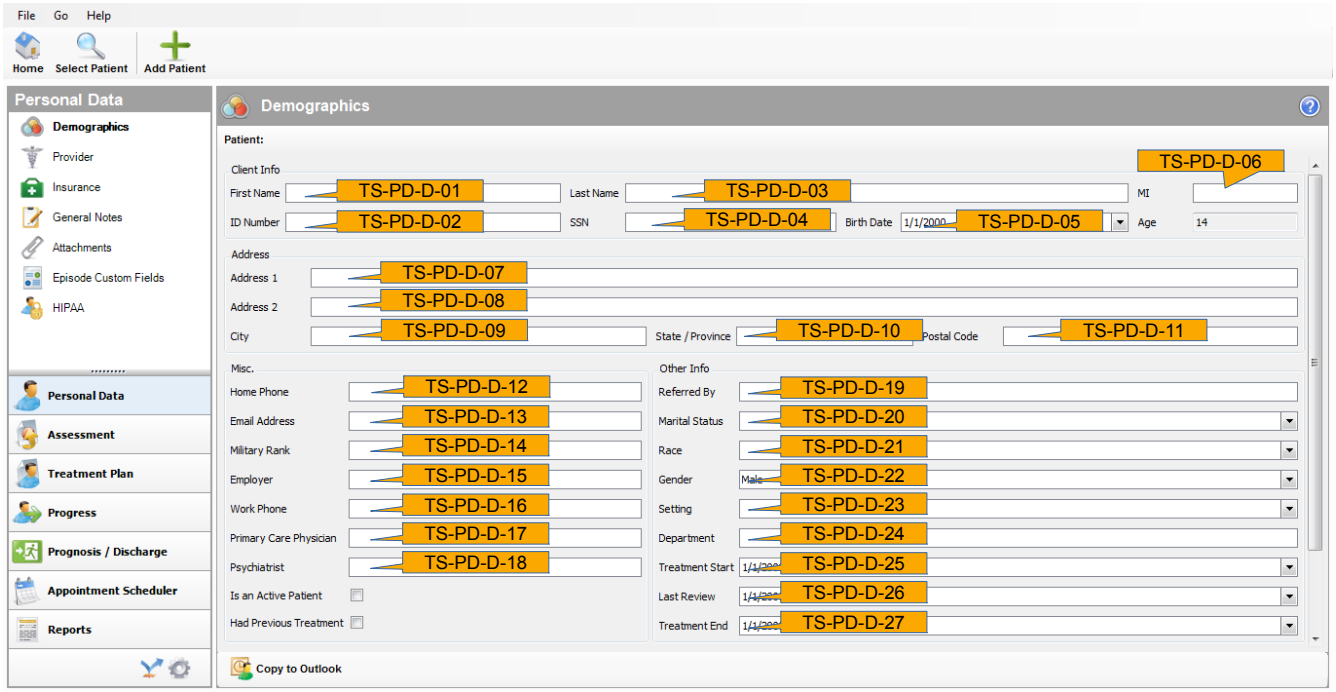
This area of the guide will detail any recent updates to the TheraScribe importer. TherapyCharts is continually adding features, and new features may allow for additional data to be imported from TheraScribe at a later date. The remainder of the guide will detail the behavior of only the most recent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

Version 1.0 – March 2014

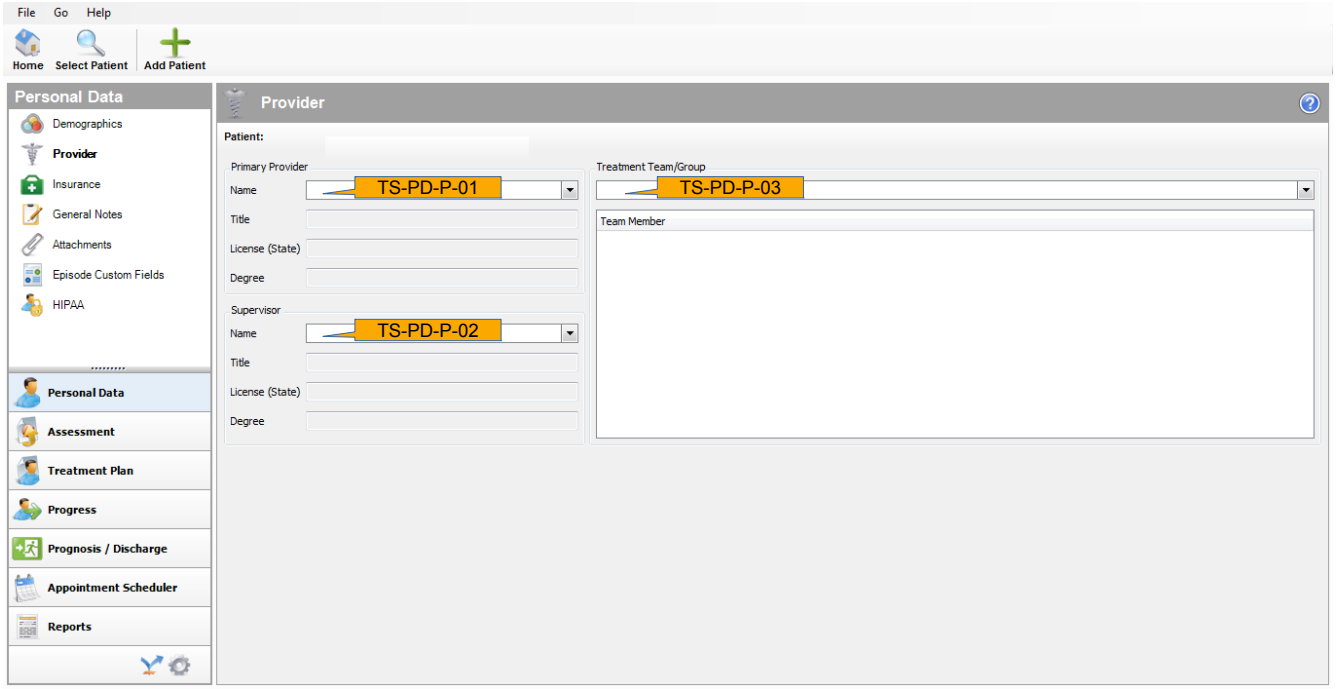
- Added initial set of fields for import

TheraScribe Interface

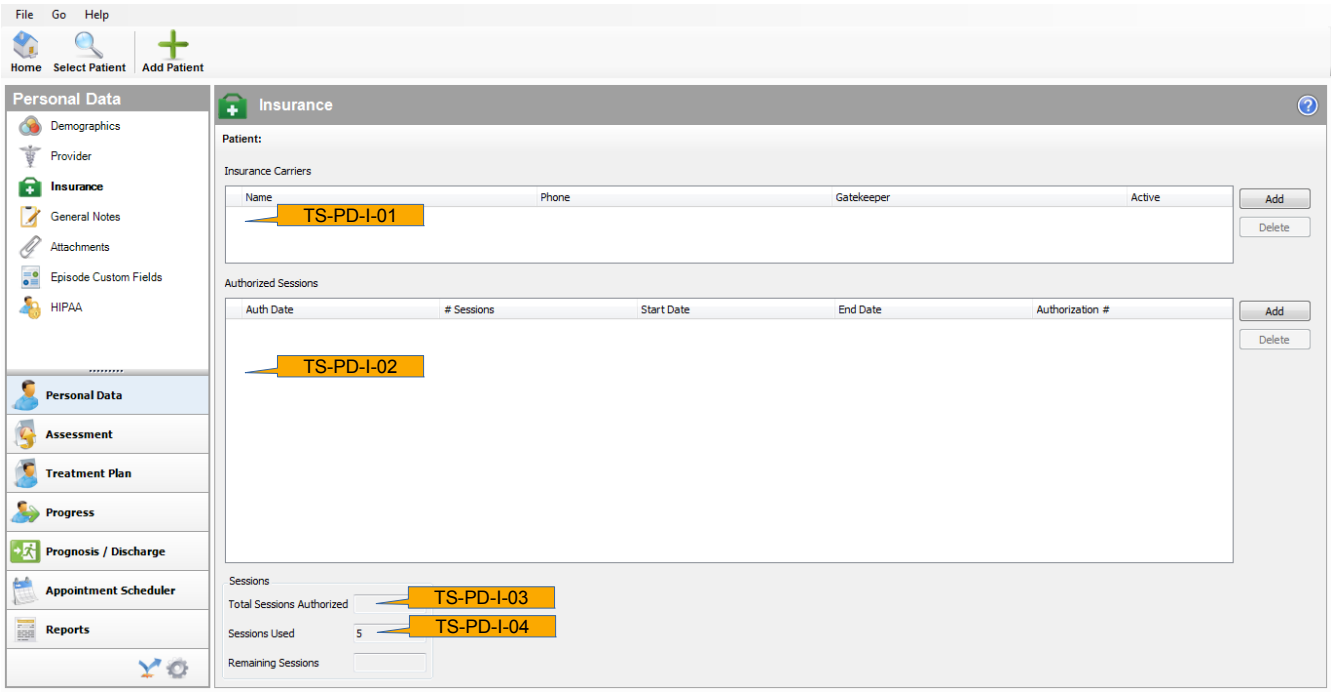
Personal Data - Demographics



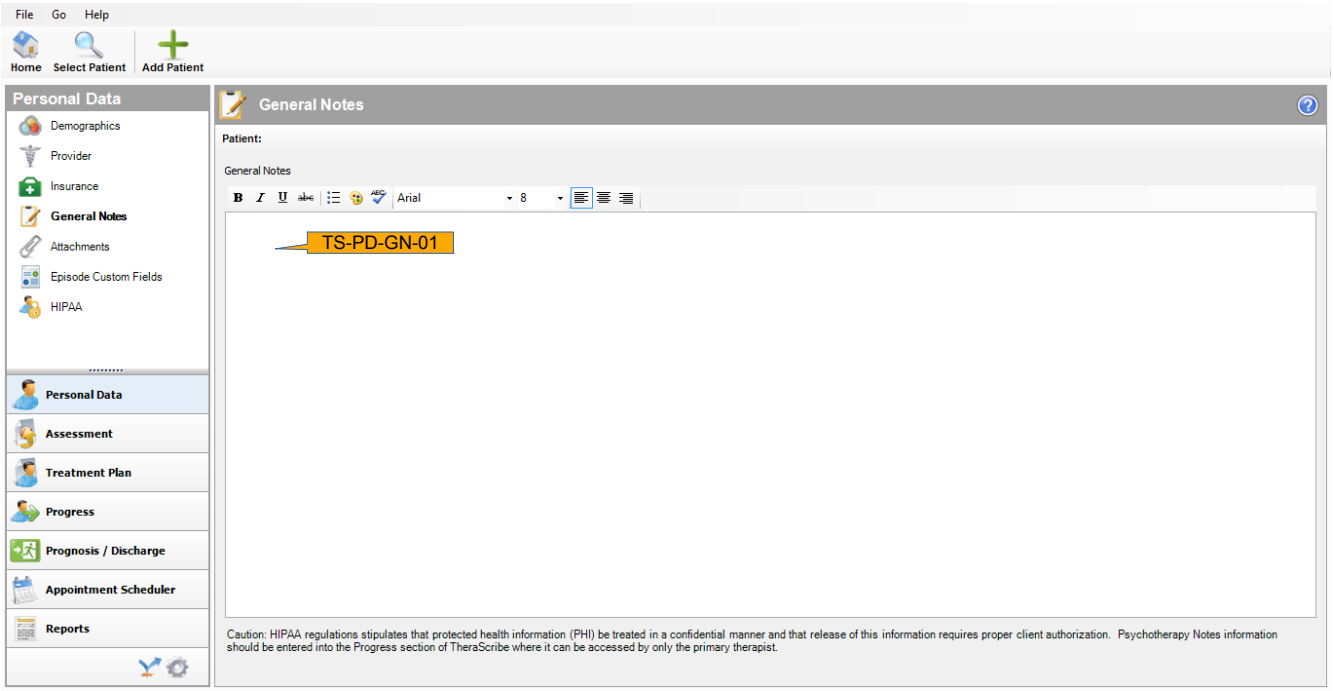
Personal Data - Provider



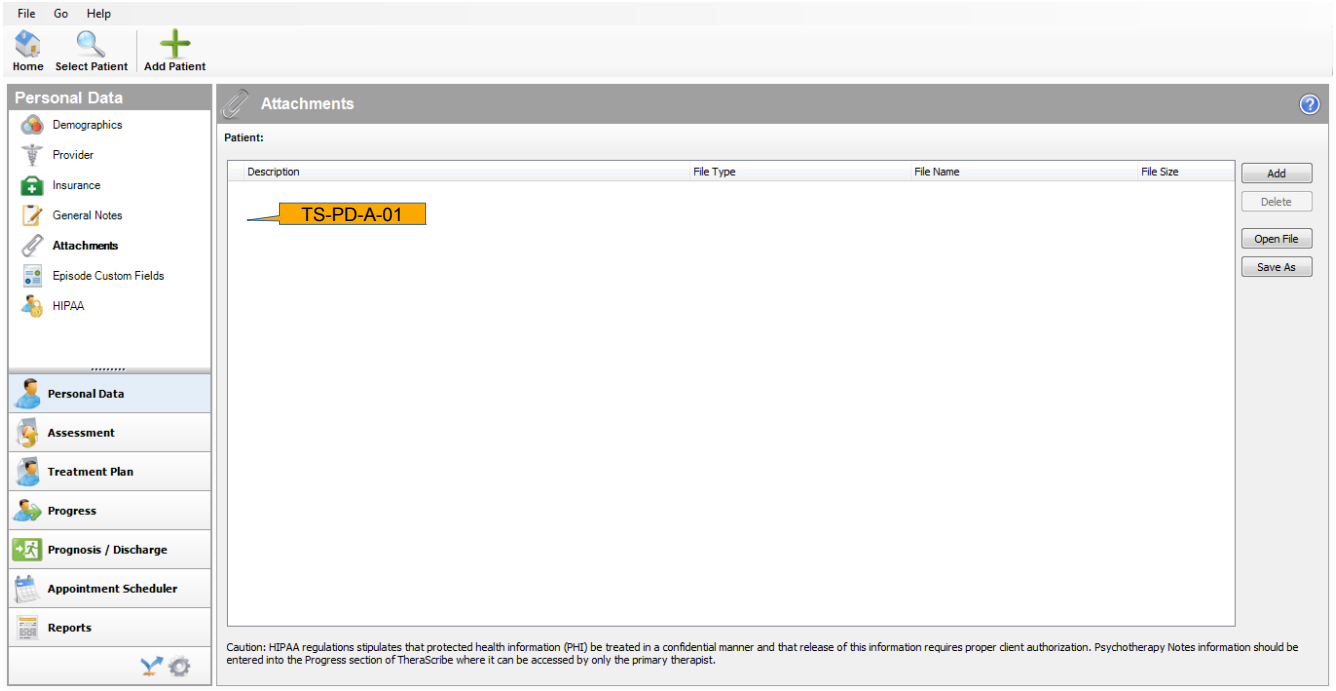
Personal Data - Insurance



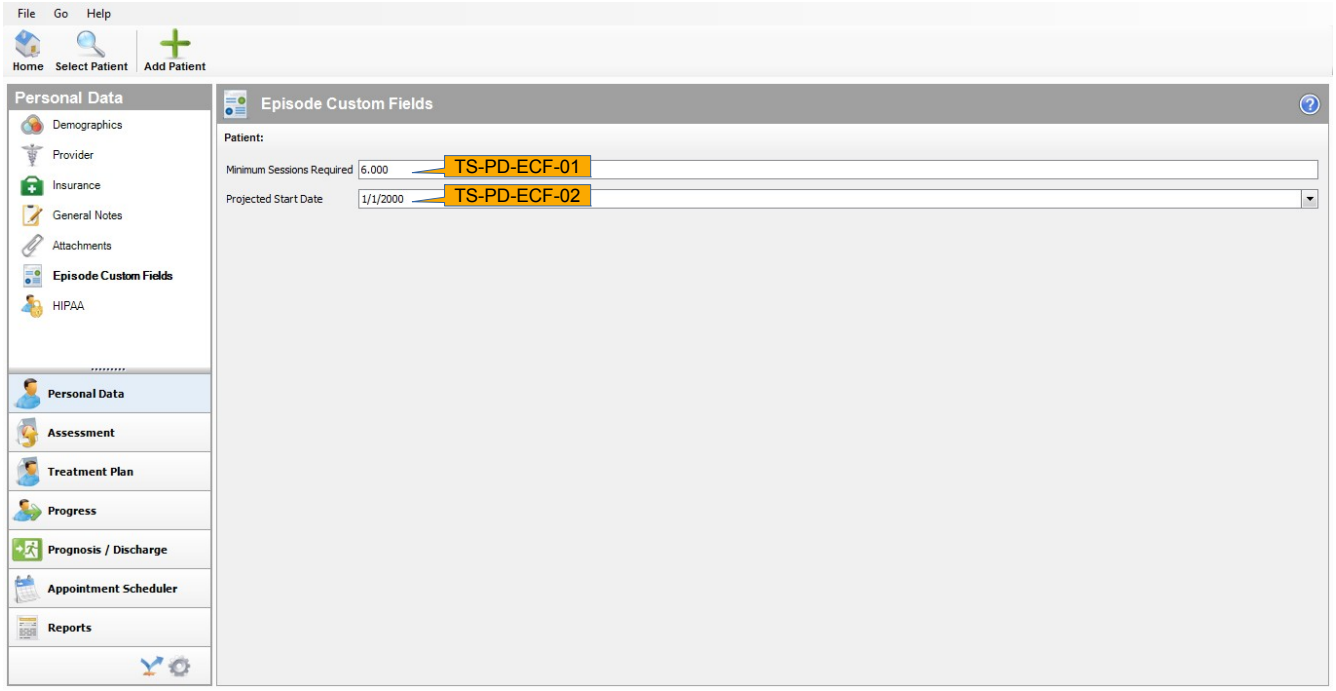
Personal Data - General Notes



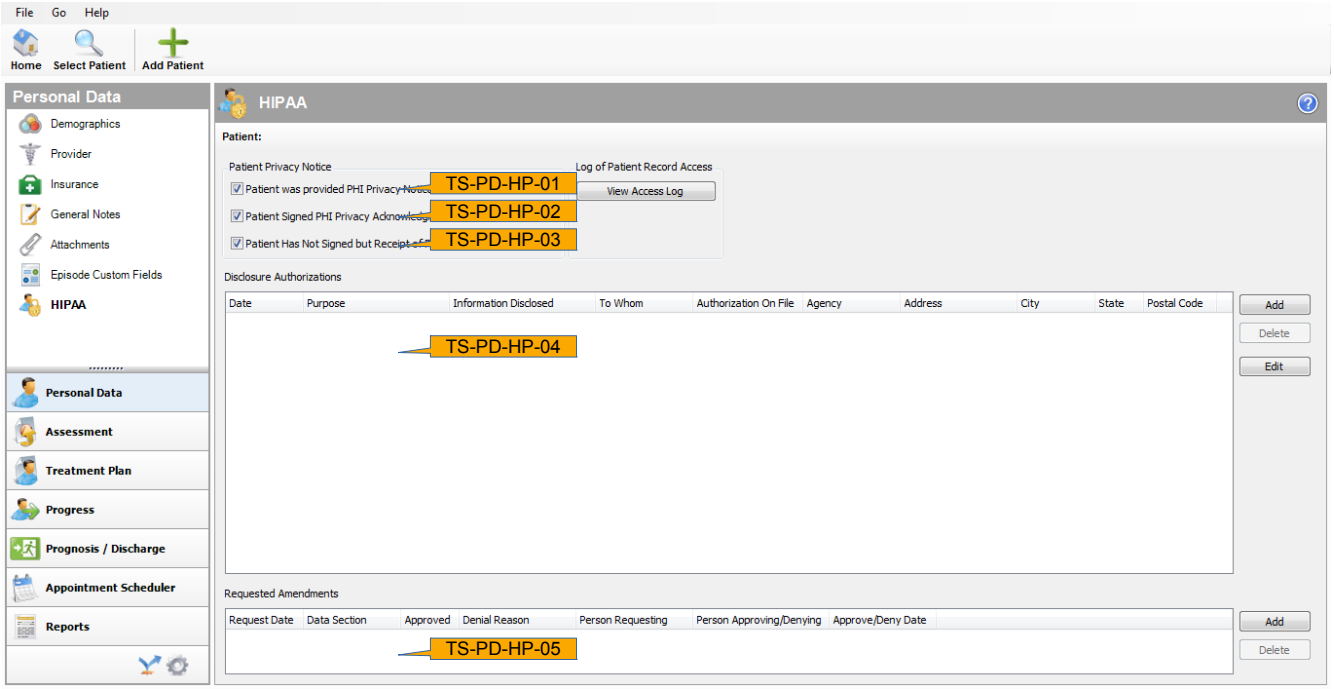
Personal Data - Attachments



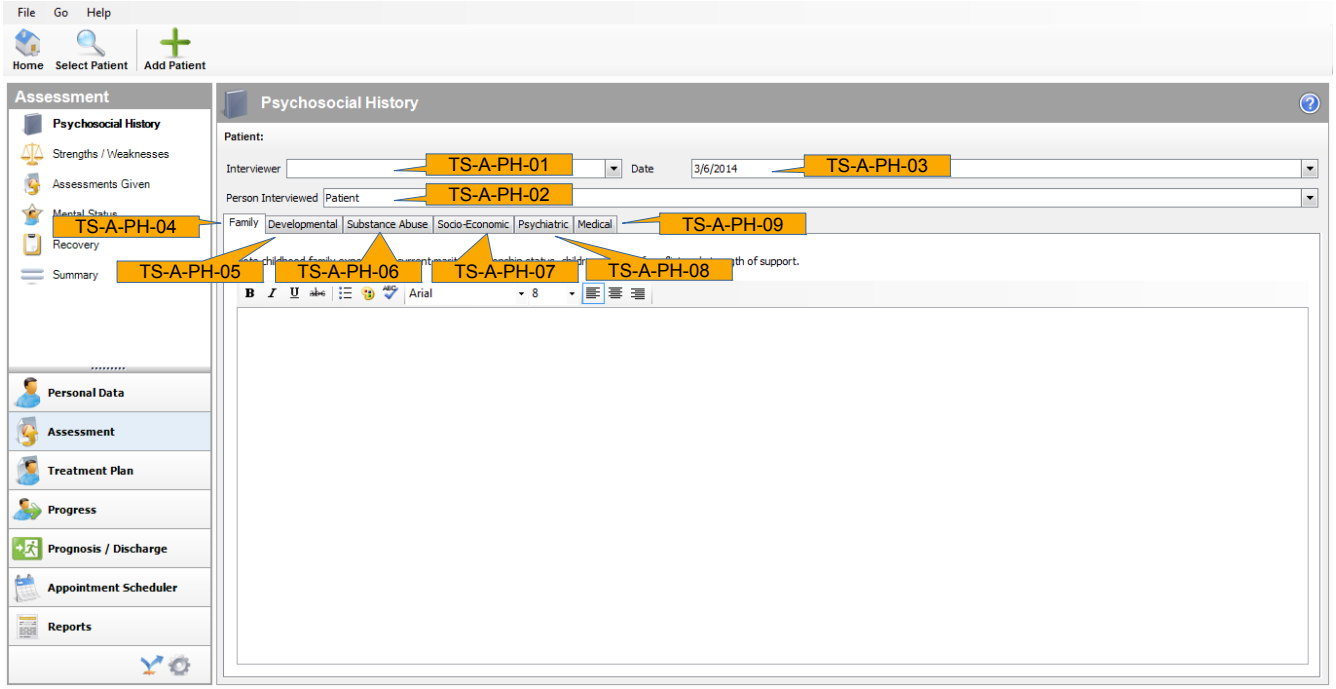
Personal Data - Episode Custom Fields



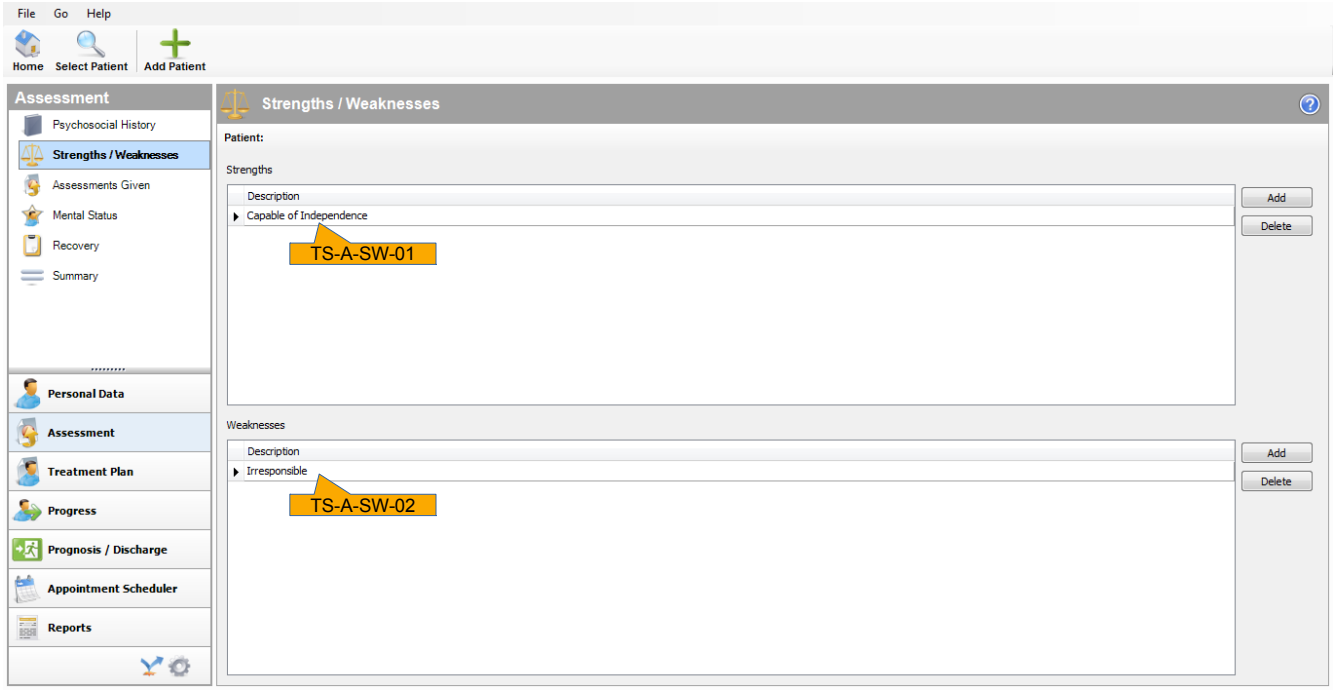
Personal Data – HIPAA



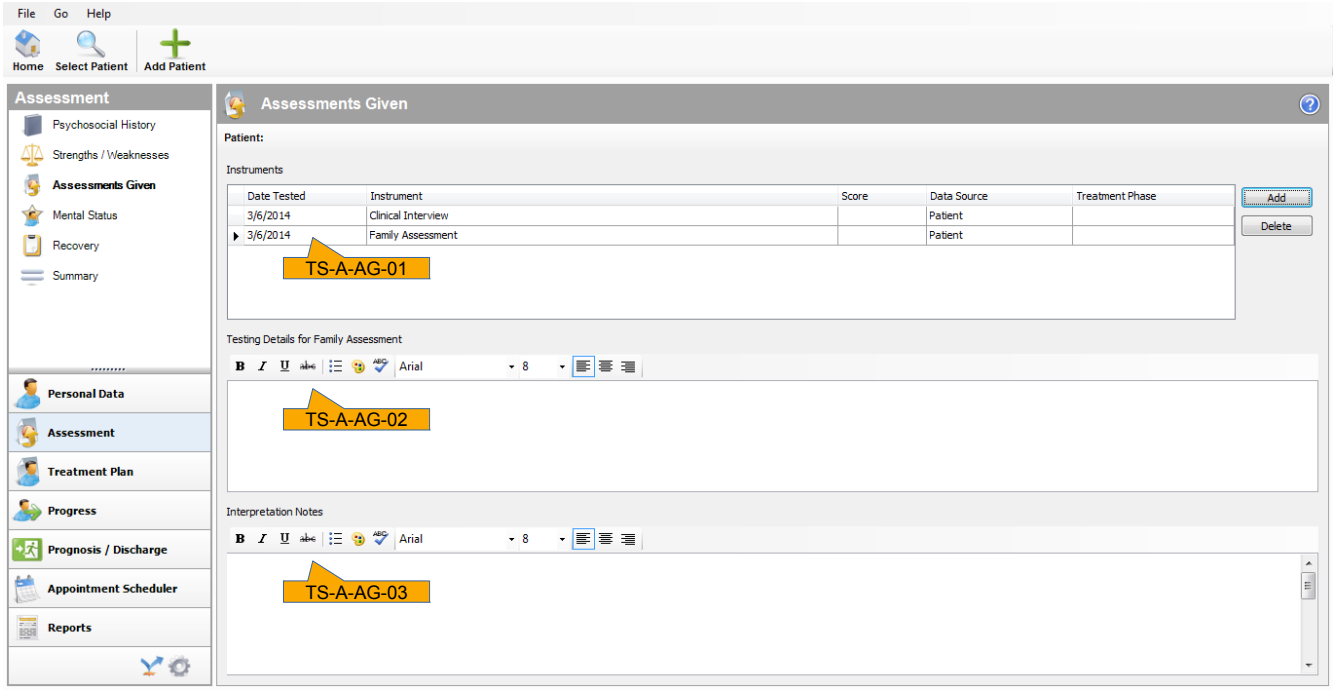
Assessment – Psychosocial History



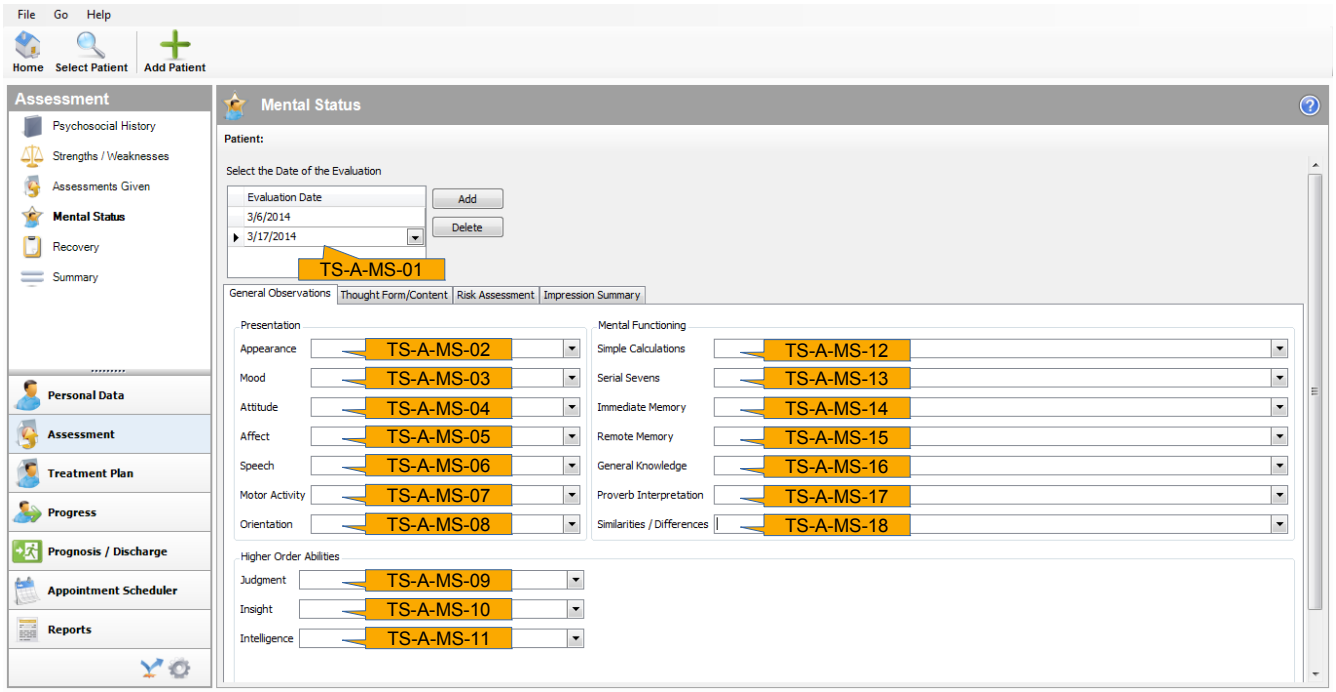
Assessment – Strengths / Weaknesses



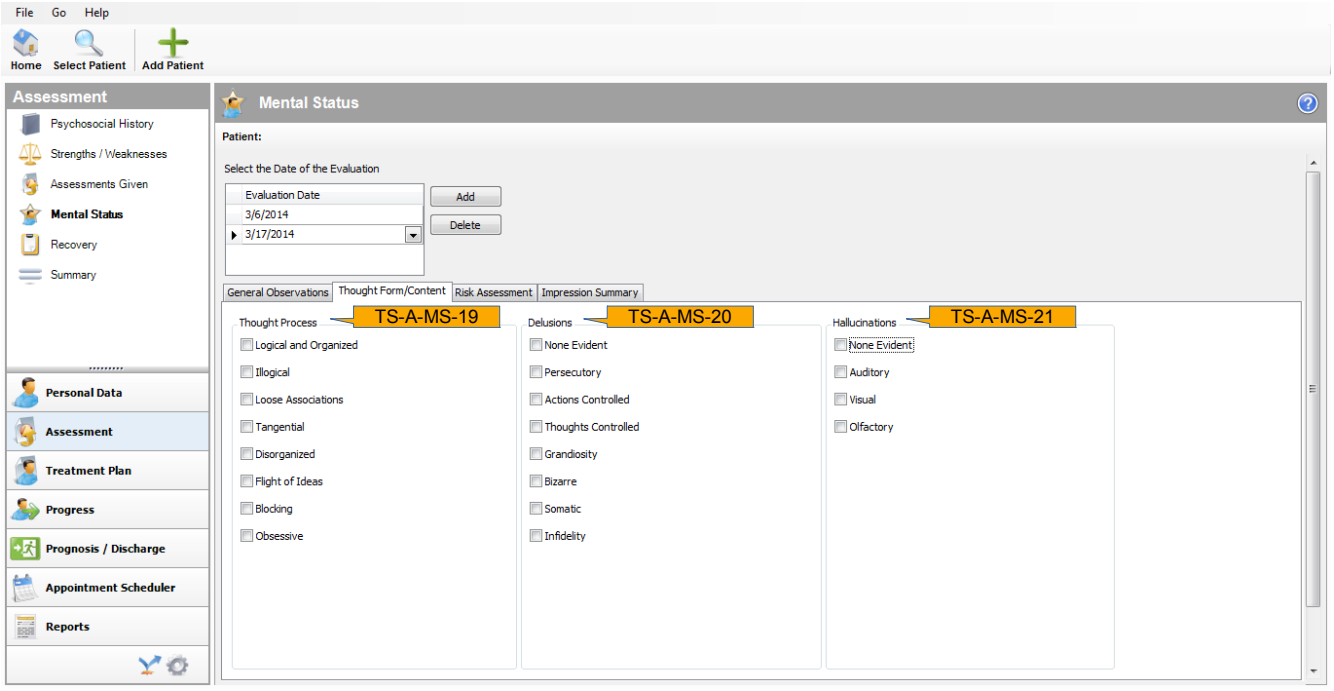
Assessment – Assessments Given



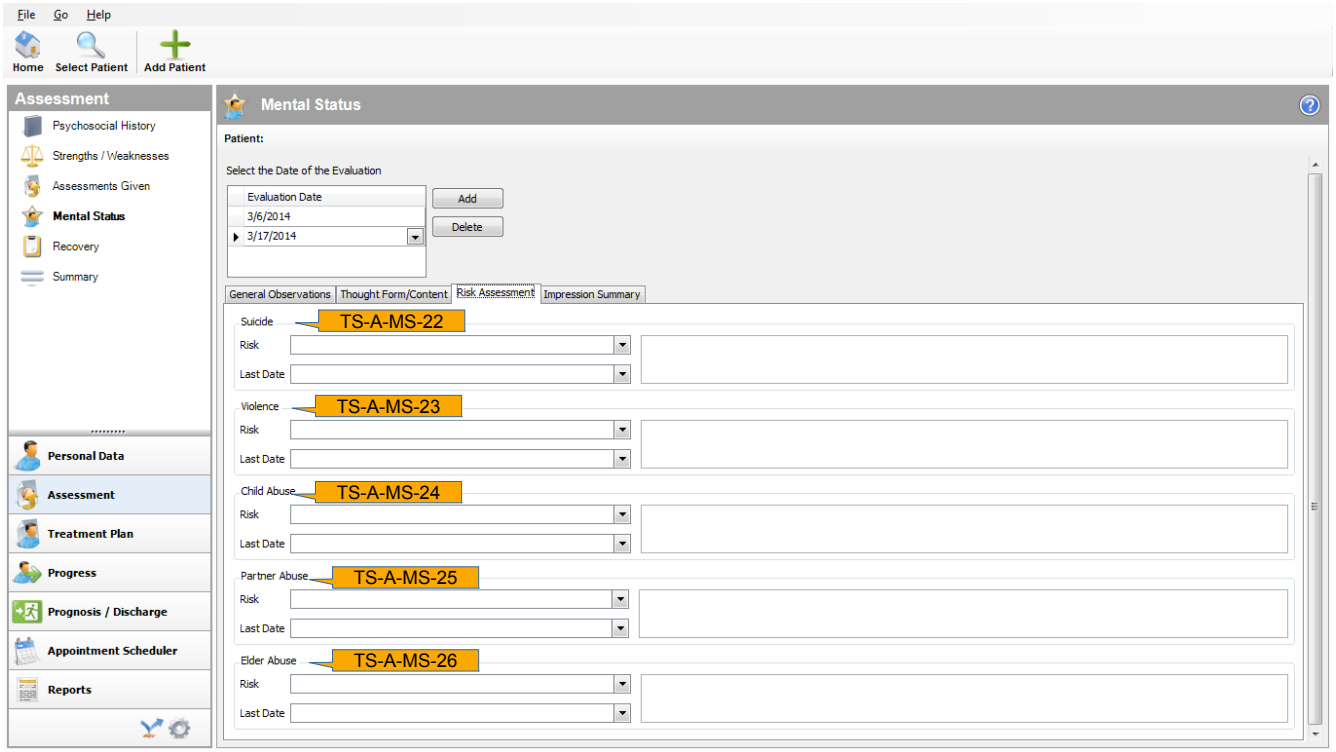
Assessment – Mental Status – General Observations



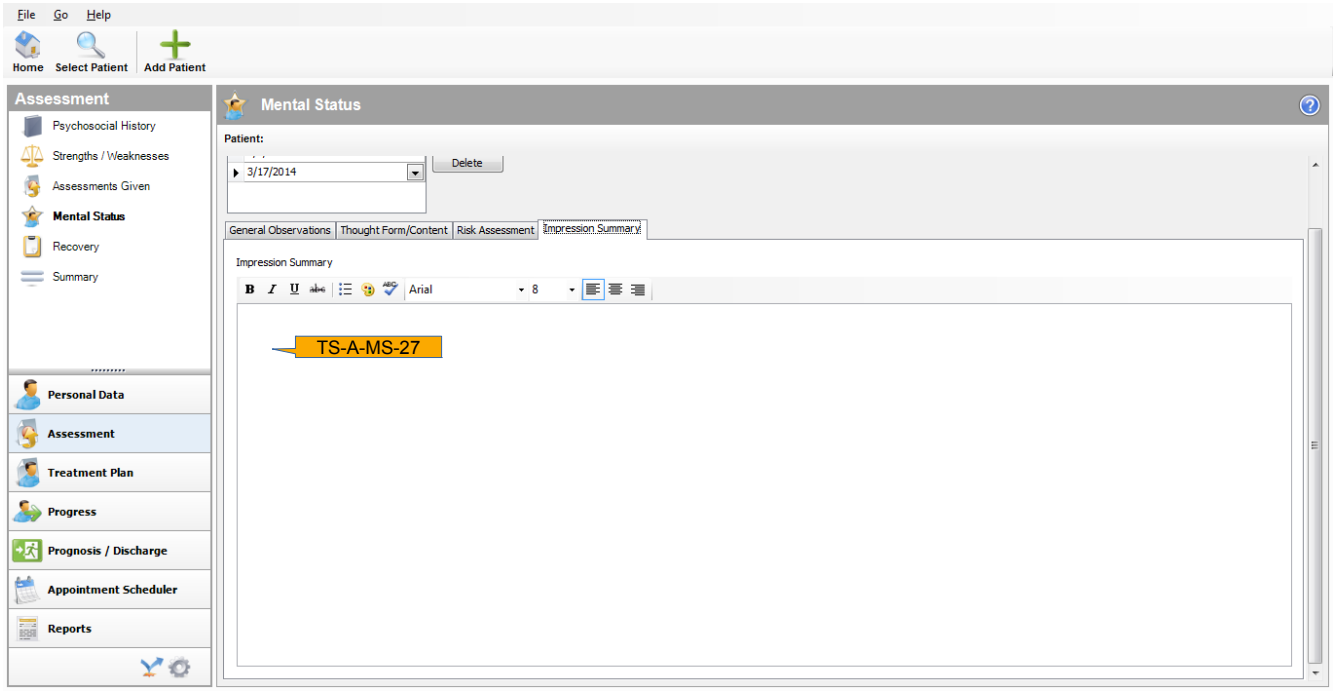
Assessment – Mental Status – Thought Form/Control



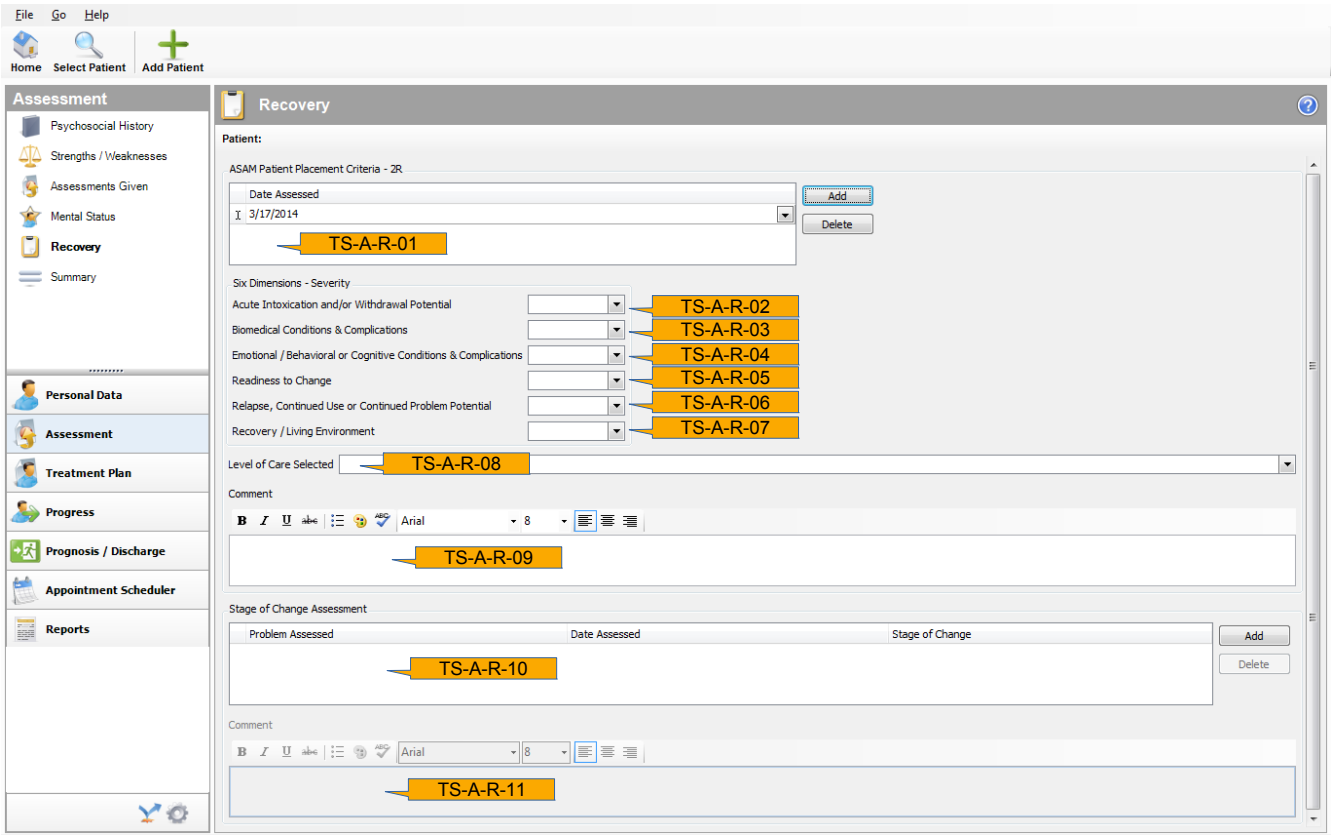
Assessment – Mental Status – Risk Assessment



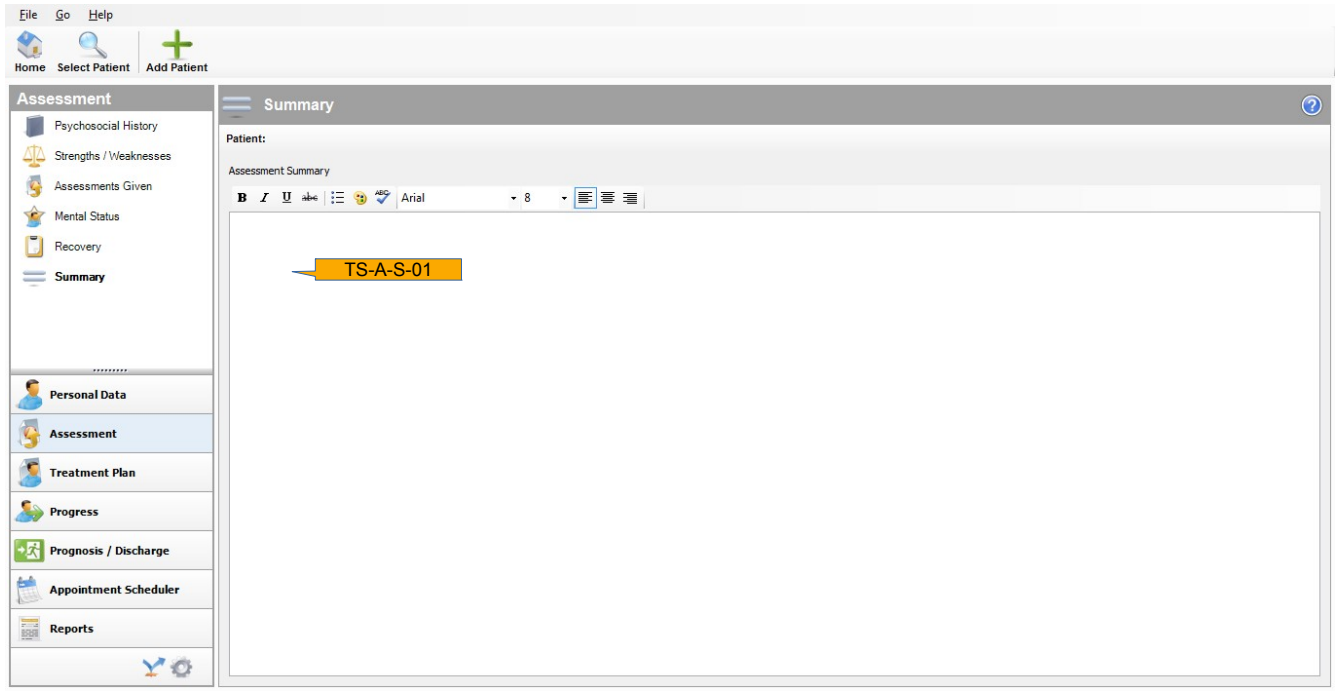
Assessment – Mental Status – Impression Summary



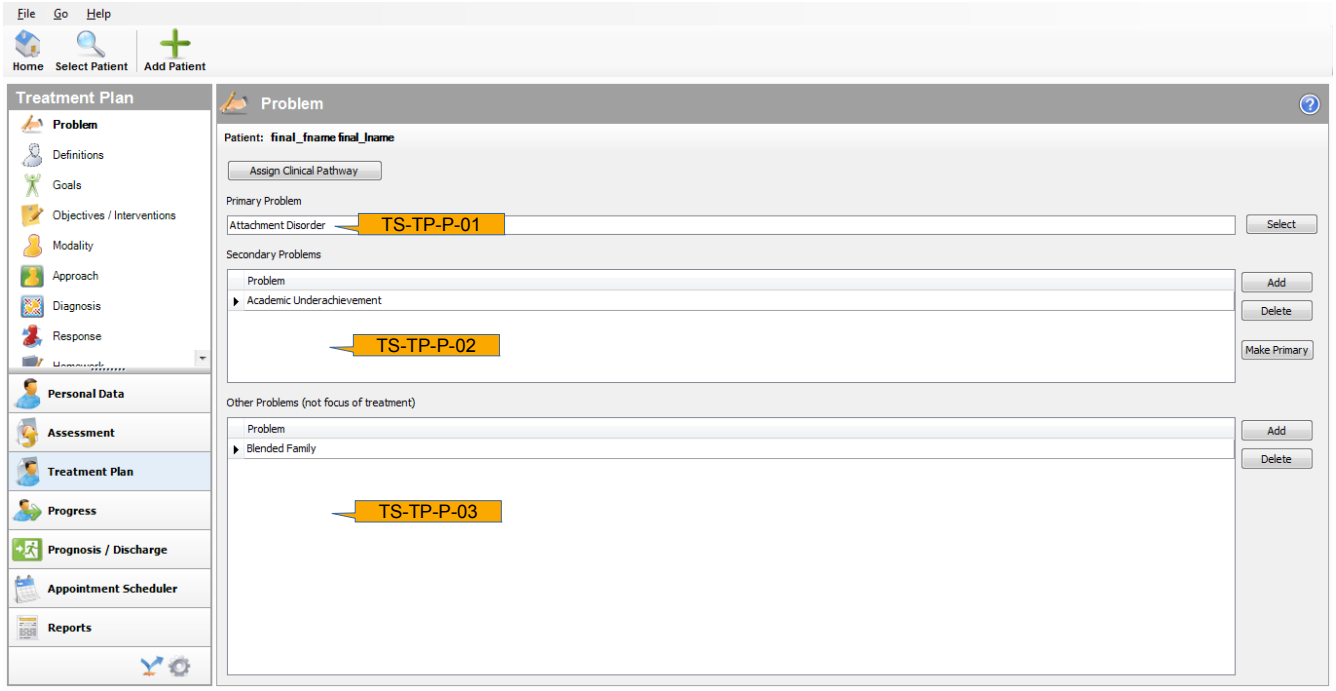
Assessment – Recovery



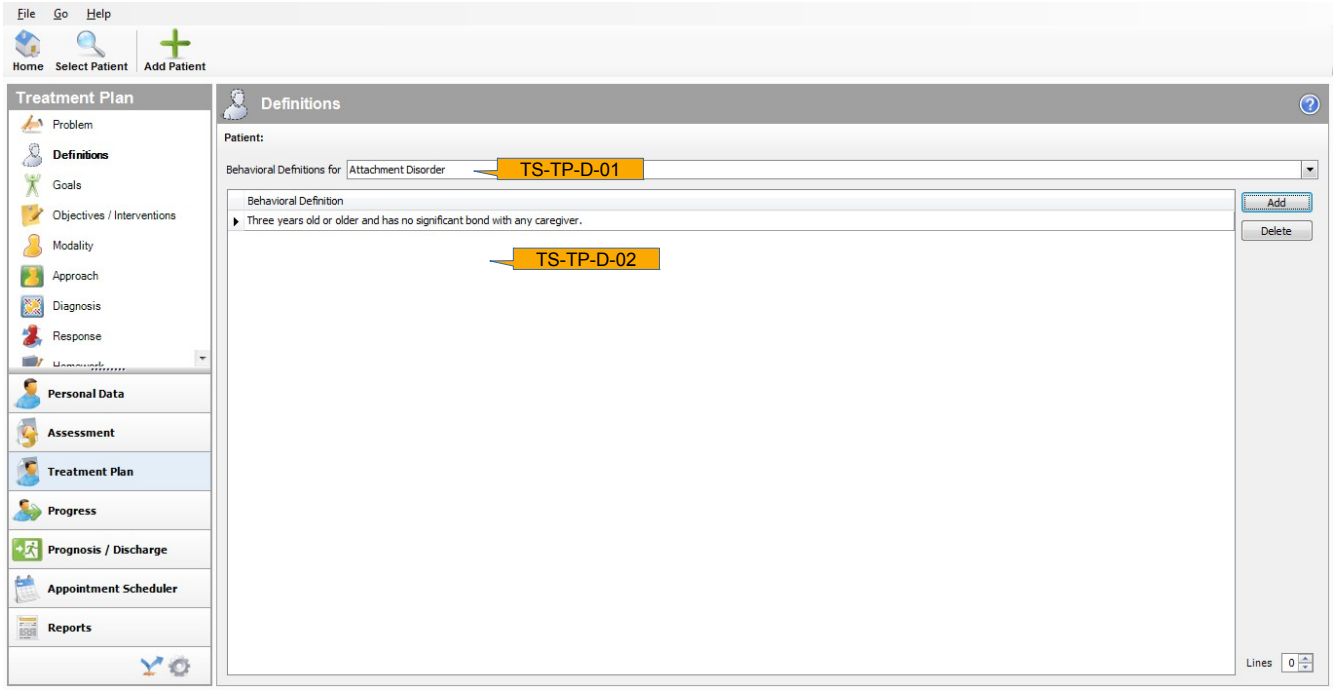
Assessment – Summary



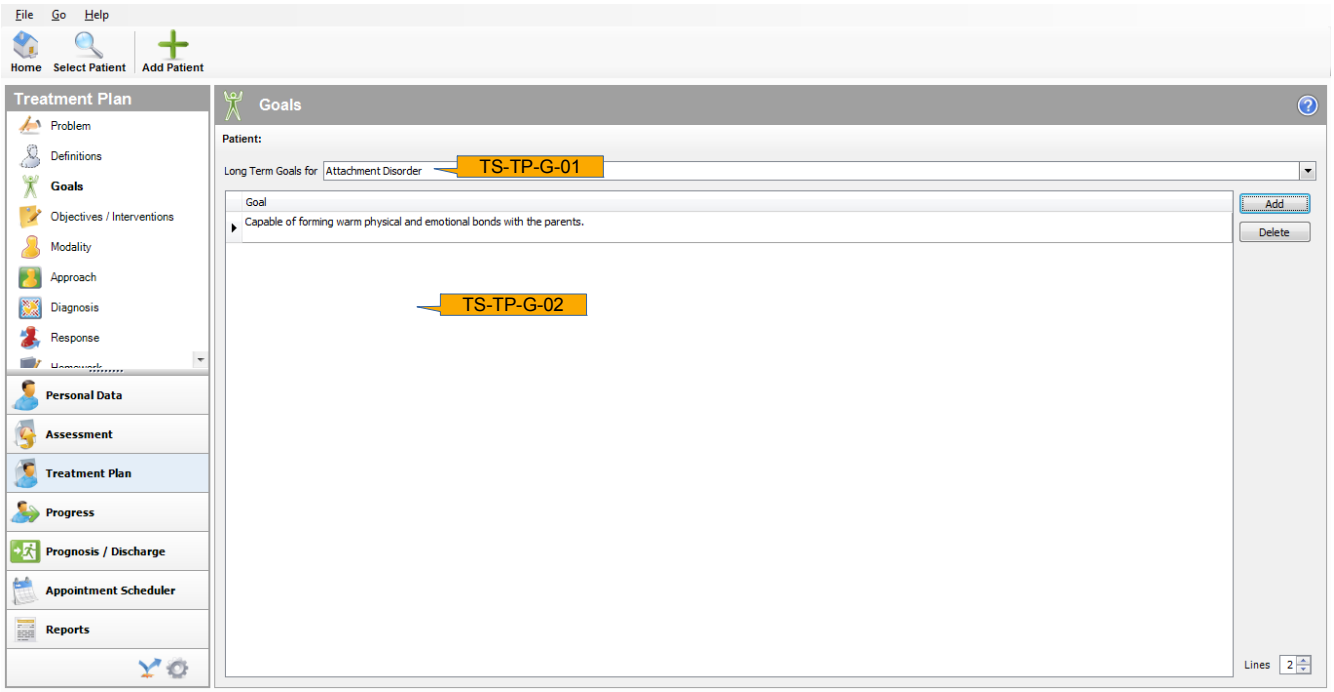
Treatment Plan – Problem



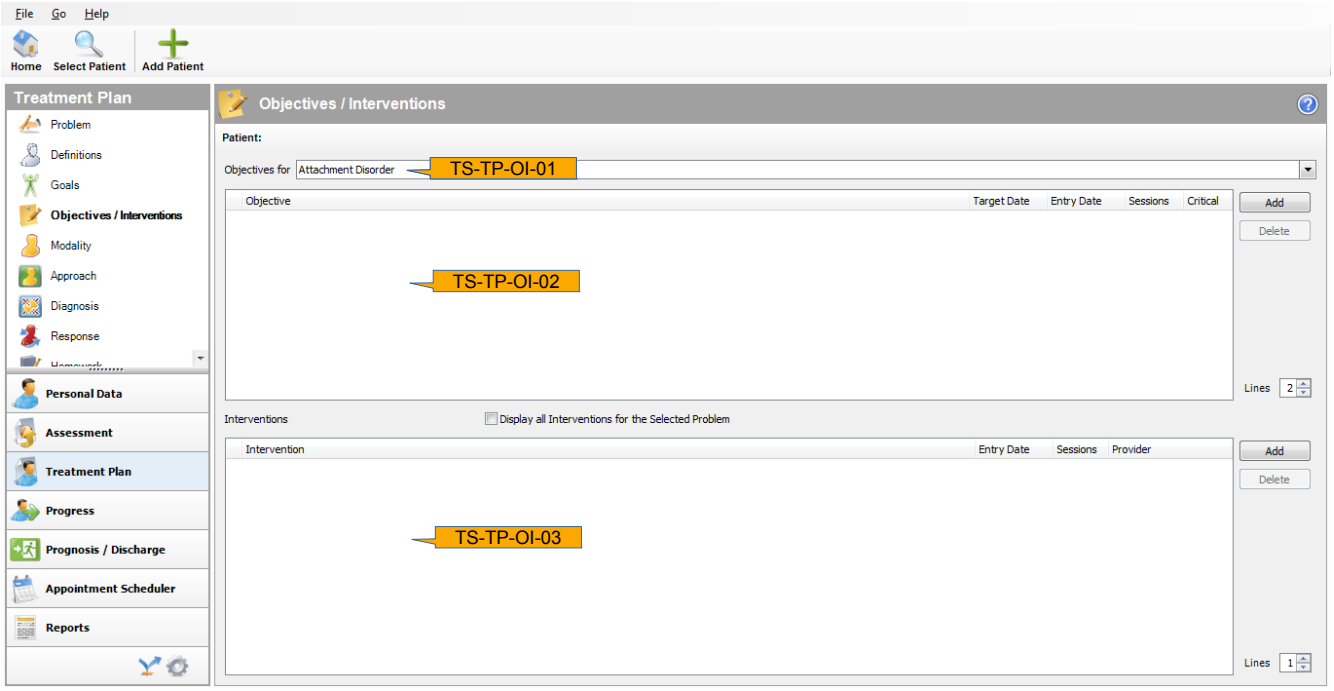
Treatment Plan – Definitions



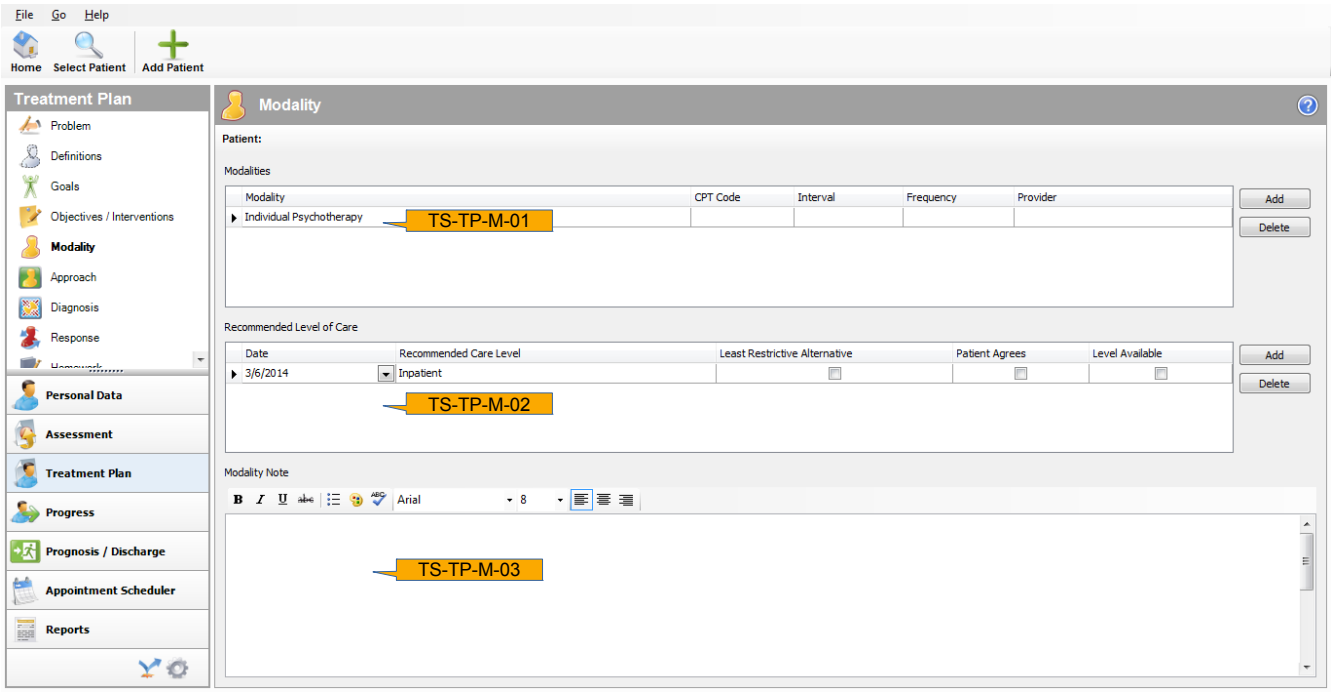
Treatment Plan – Goals



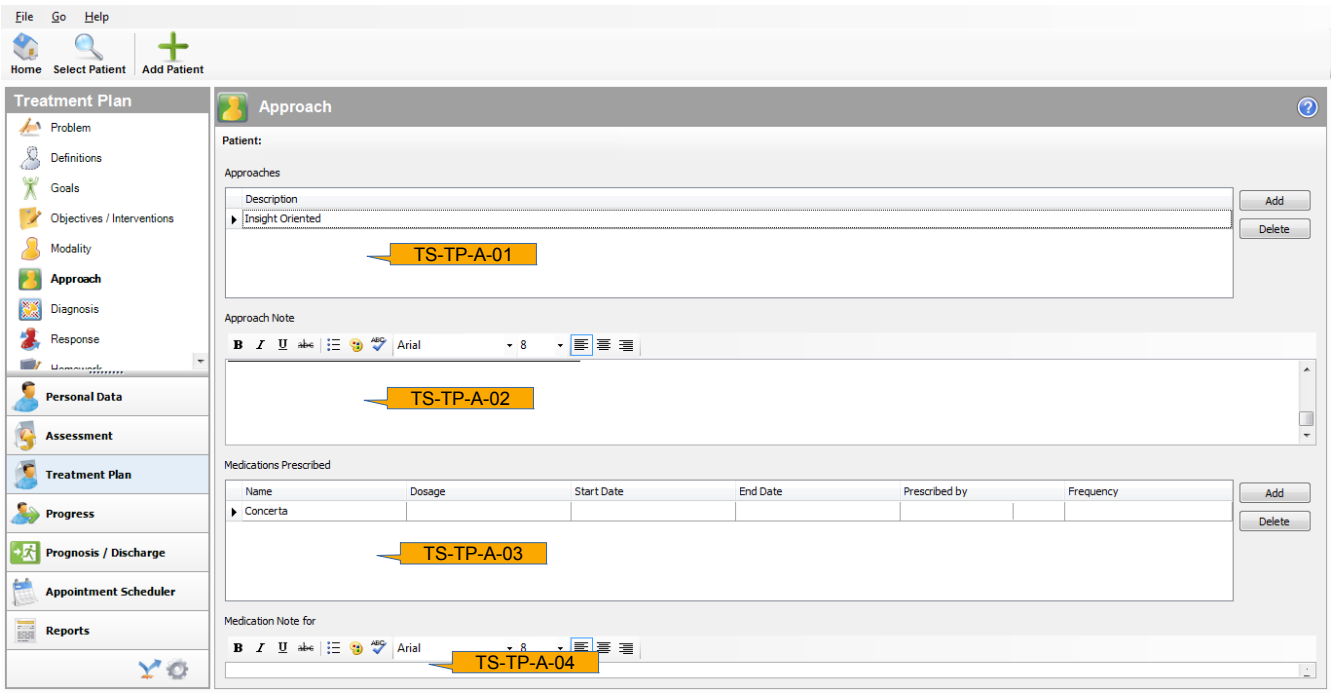
Treatment Plan – Objectives / Interventions



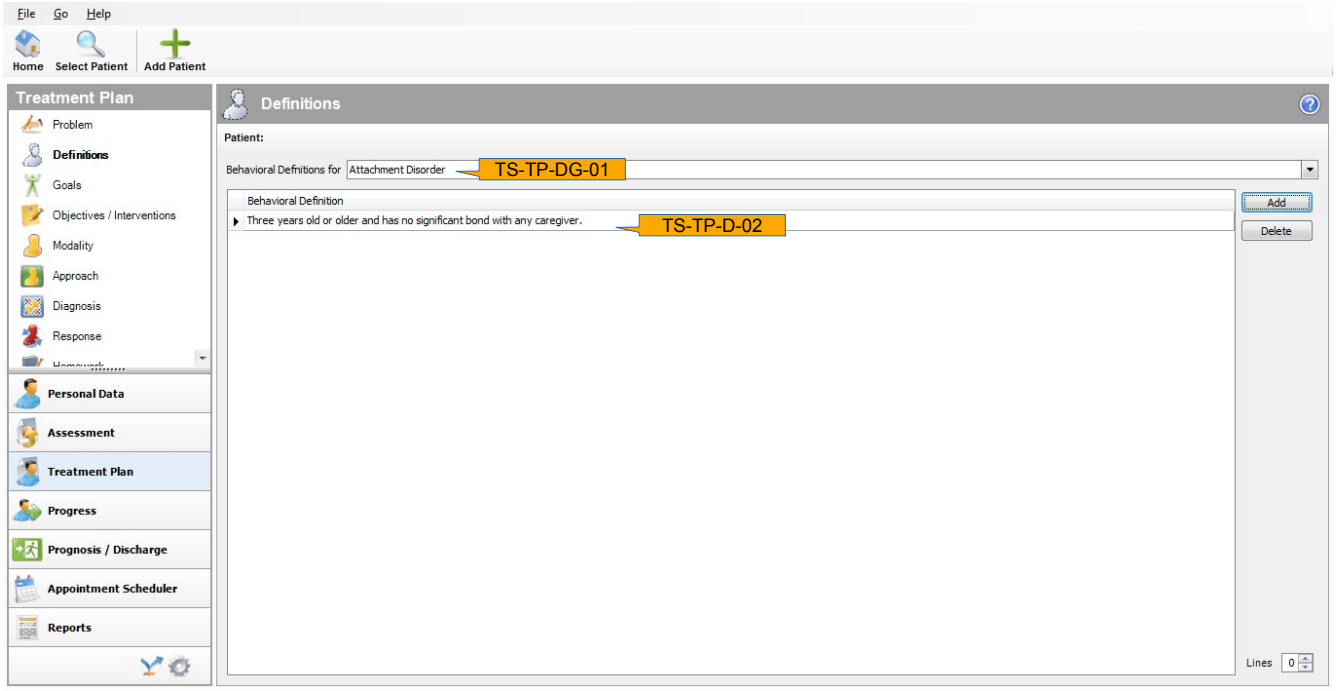
Treatment Plan – Modality



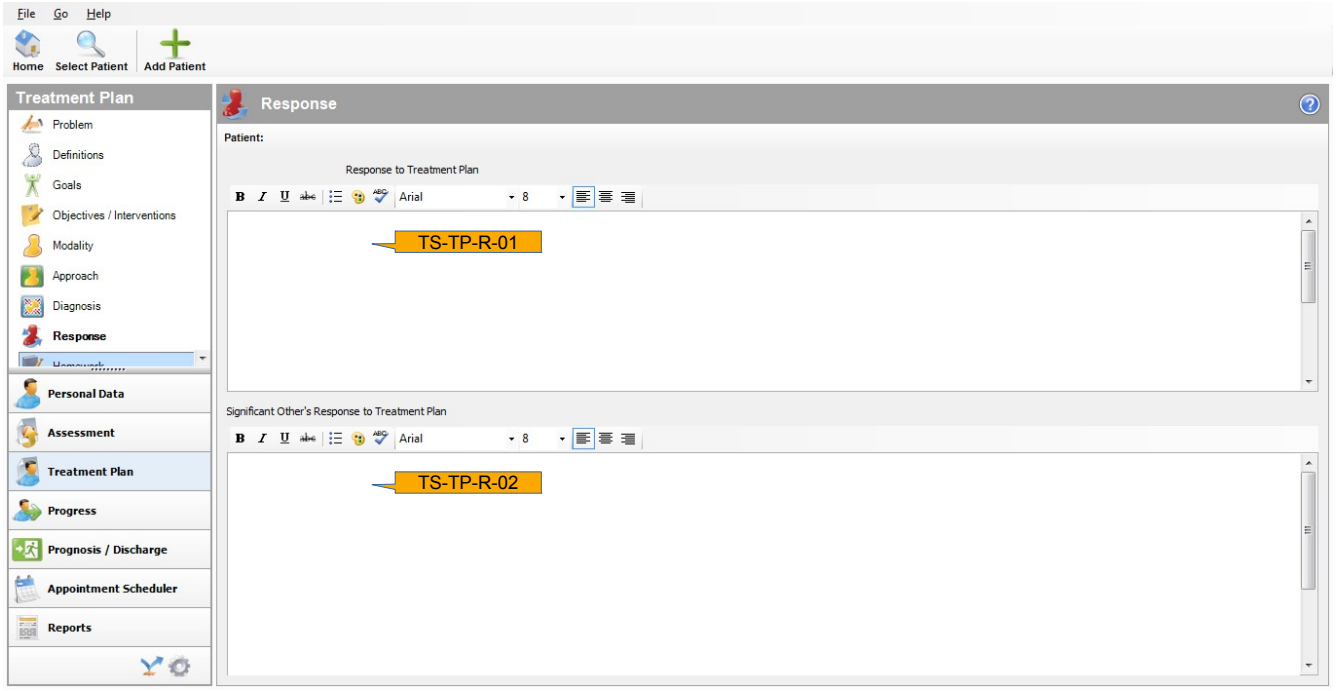
Treatment Plan – Approach



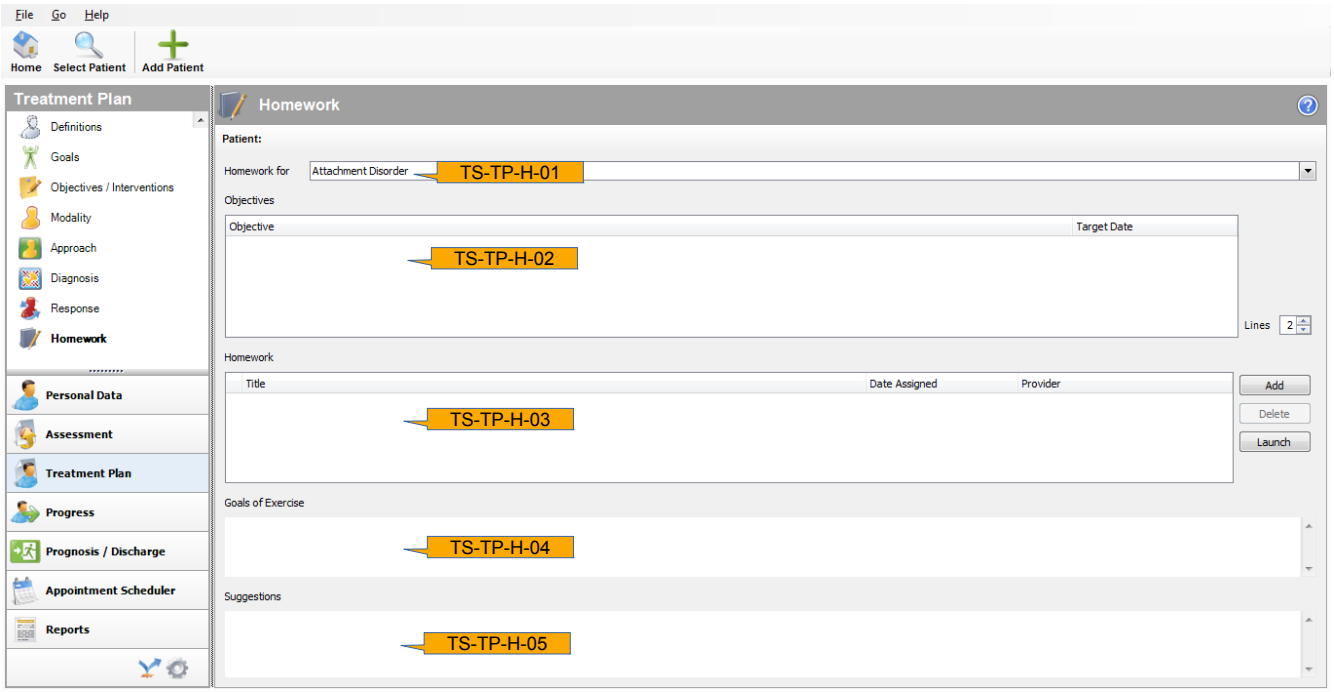
Treatment Plan – Diagnosis



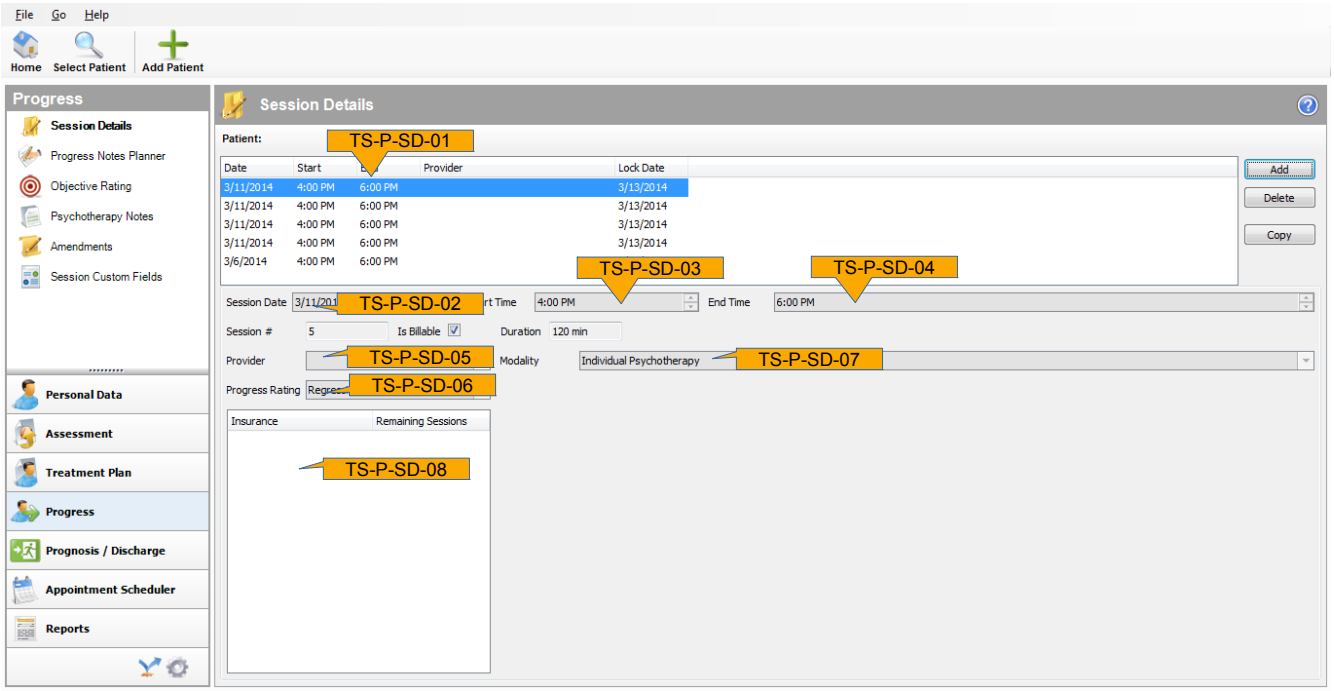
Treatment Plan – Response



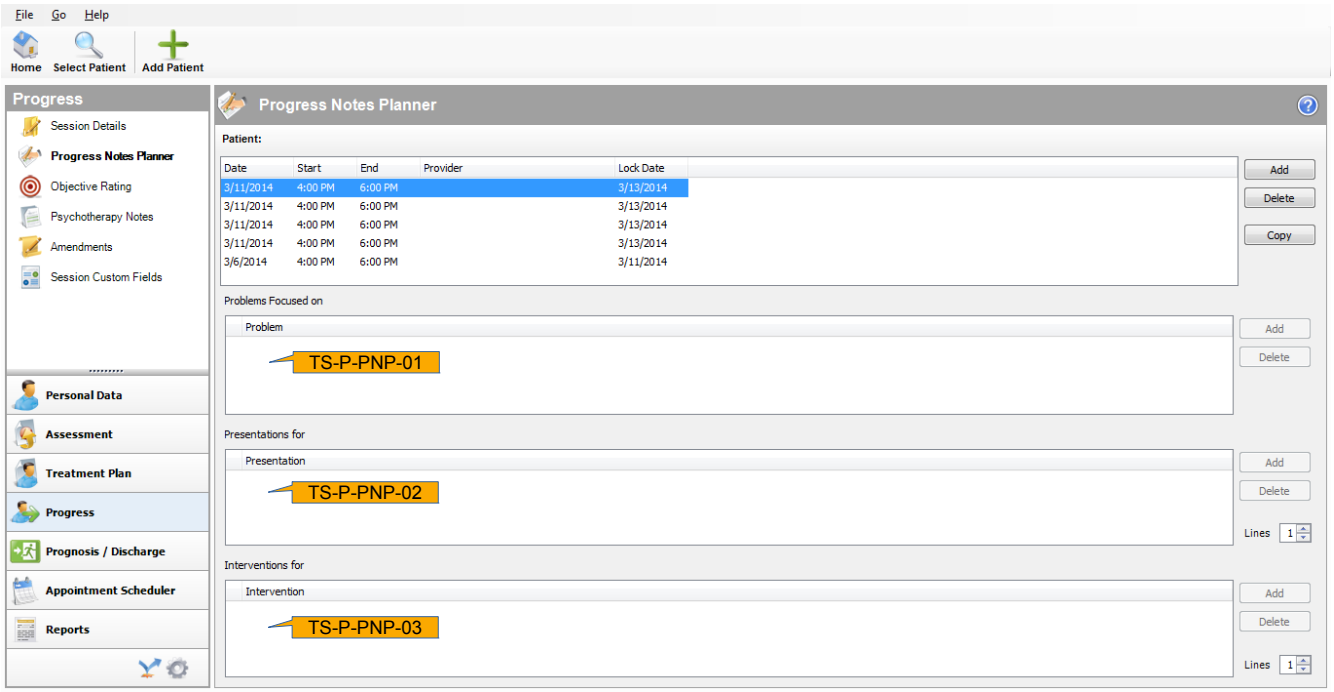
Treatment Plan – Homework



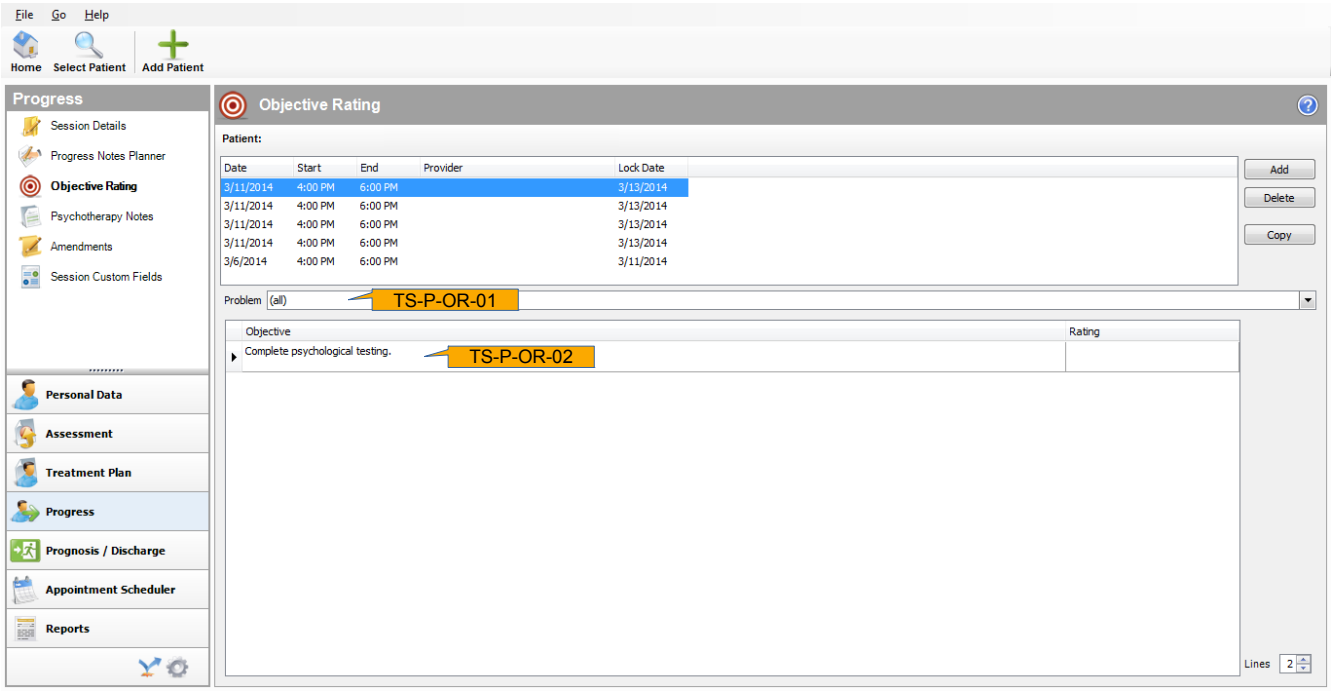
Progress – Session Details



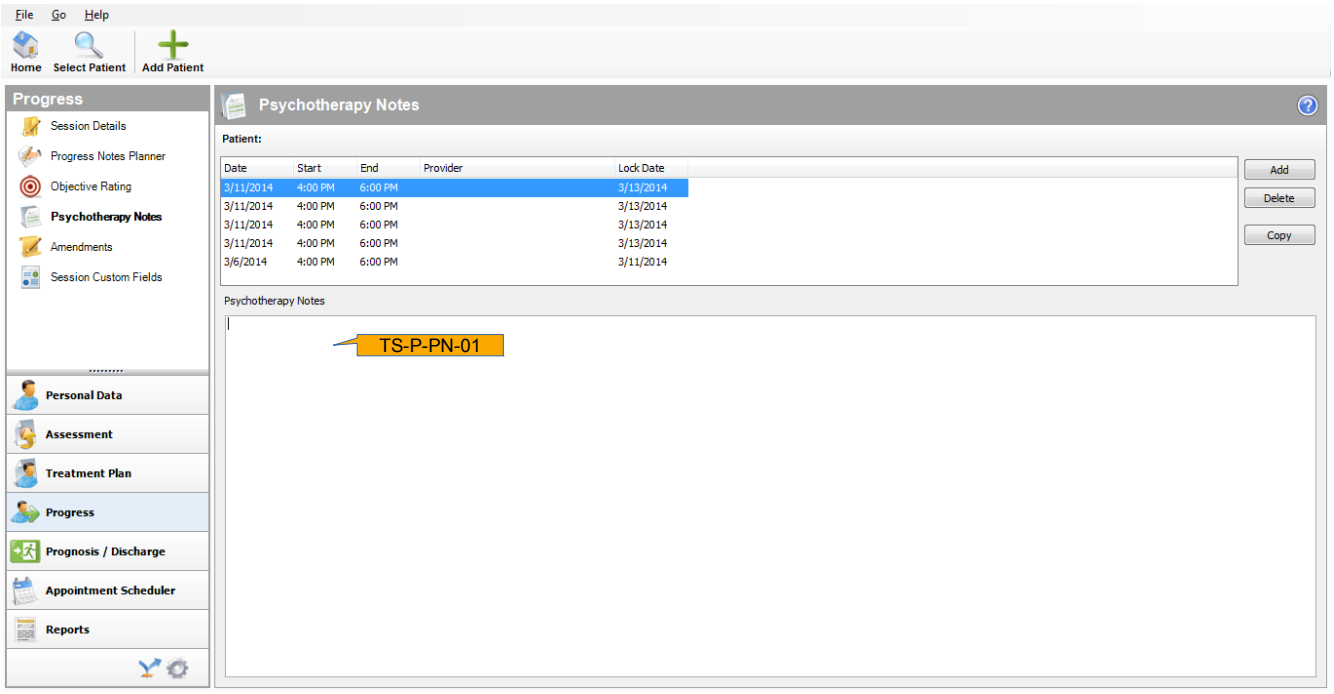
Progress – Progress Notes Planner



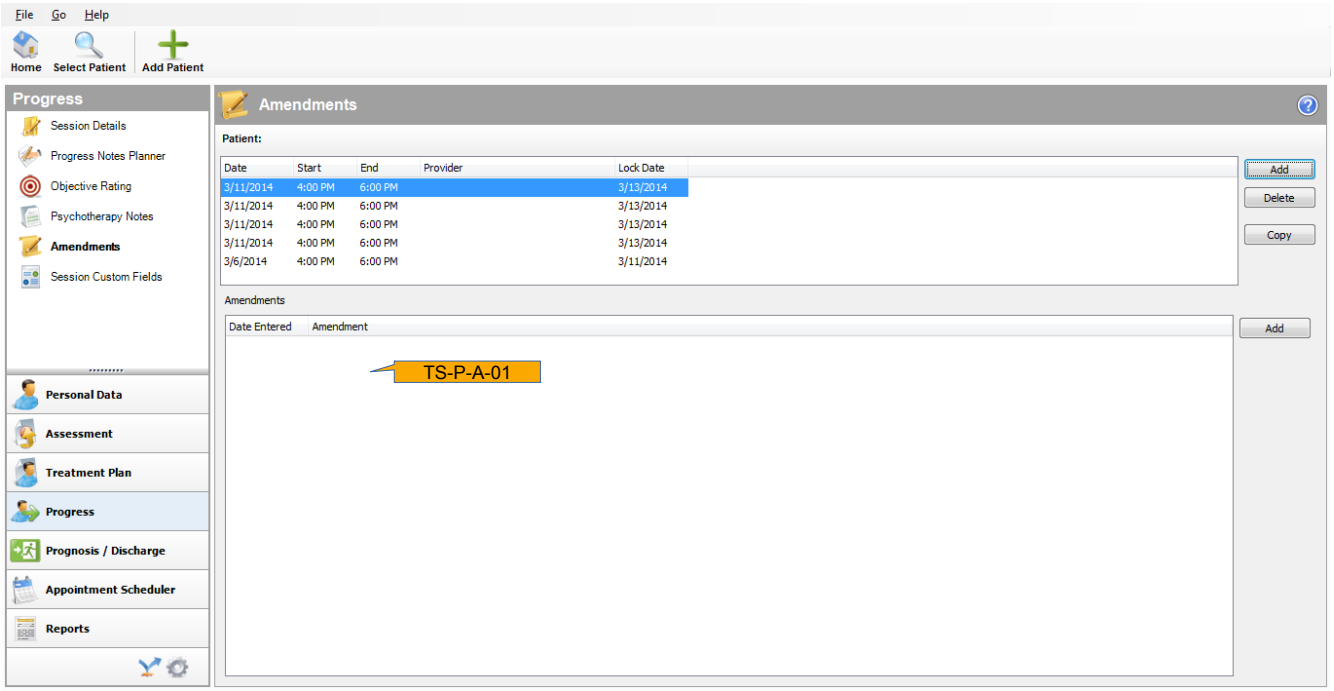
Progress – Objective Rating



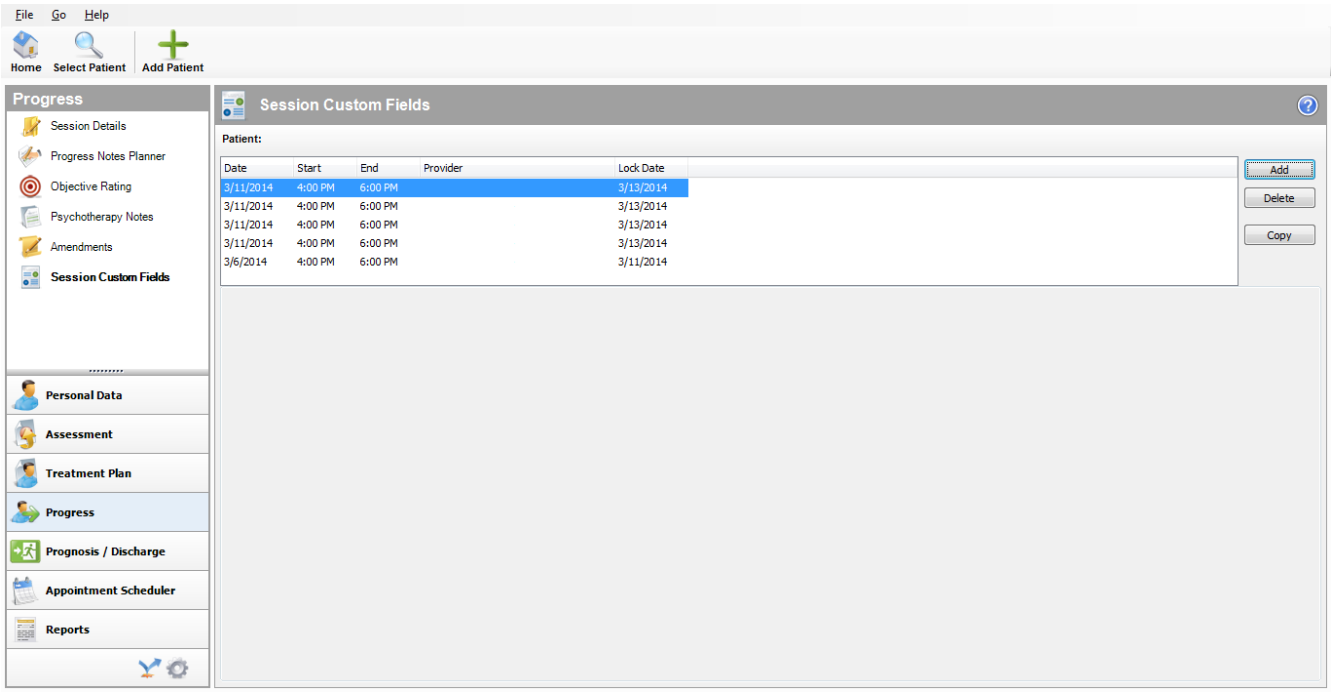
Progress – Psychotherapy Notes



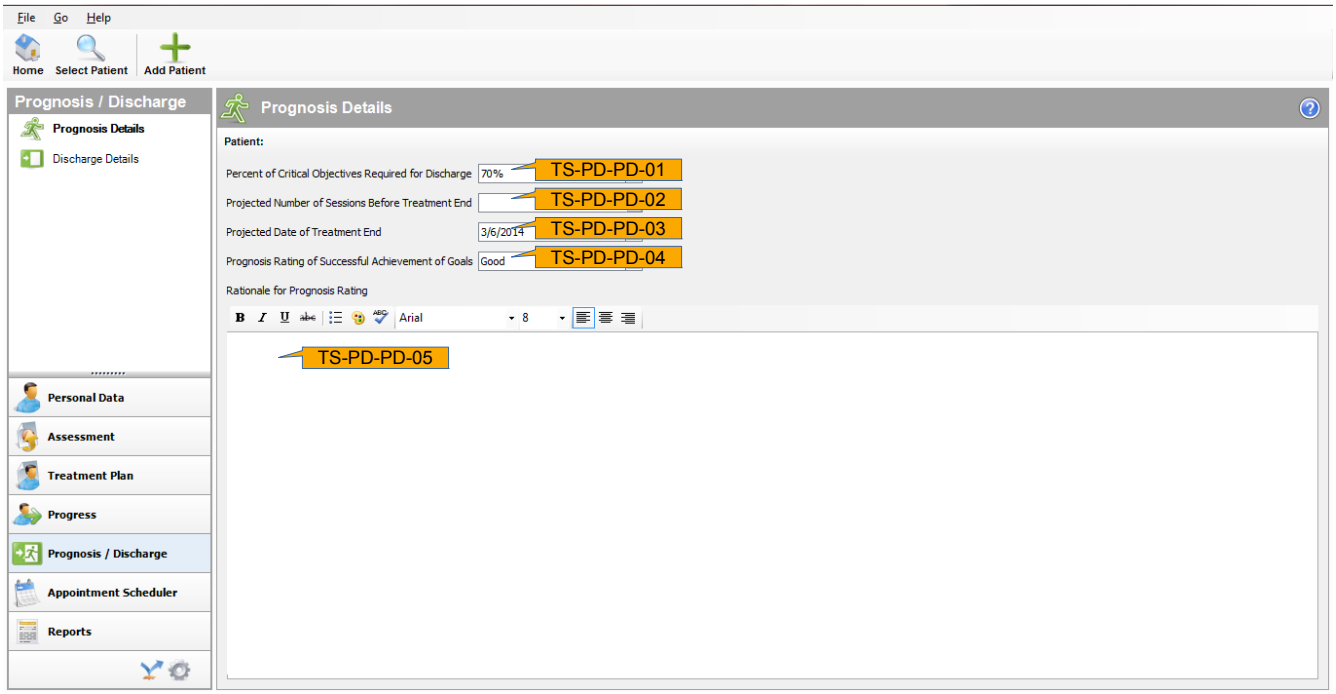
Progress – Amendments



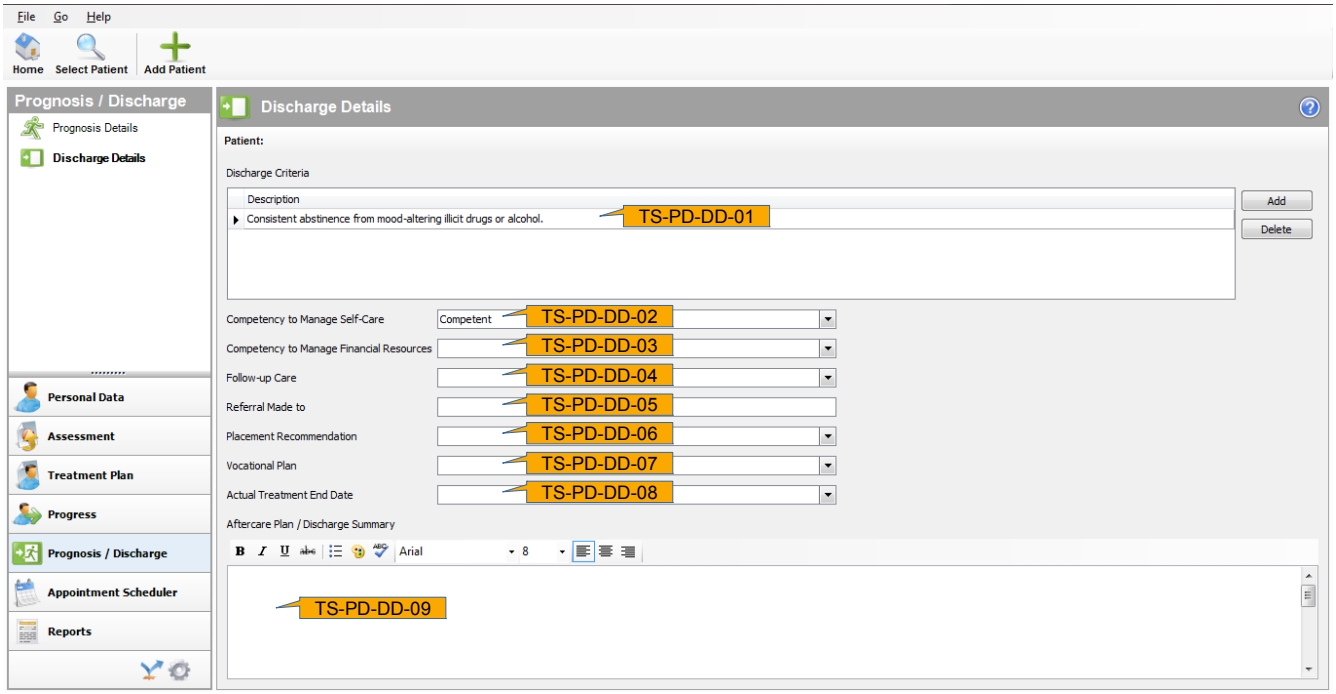
Progress – Session Custom Fields



Prognosis / Discharge – Prognosis Details

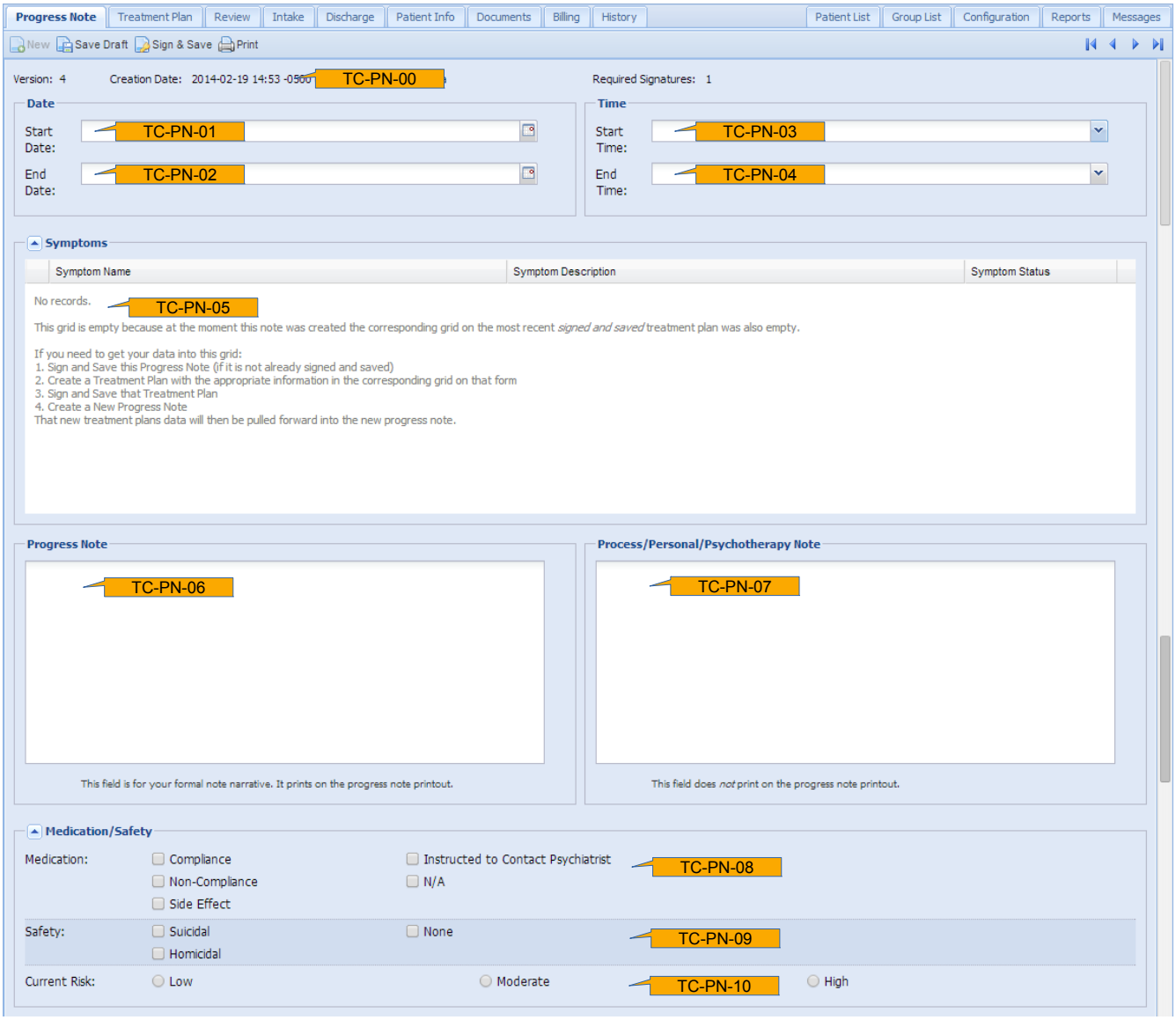


Prognosis / Discharge – Discharge Details

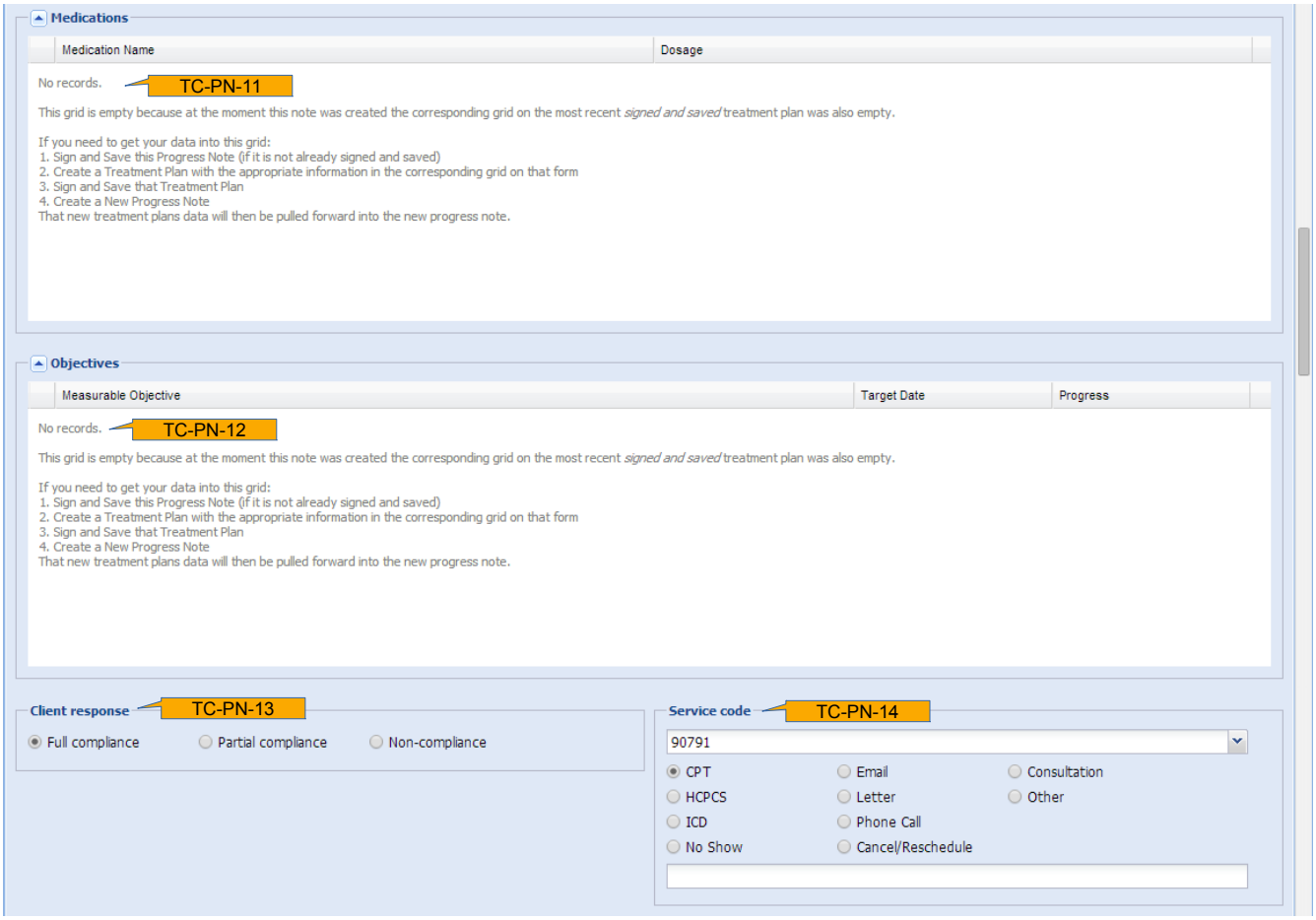


TherapyCharts Interface

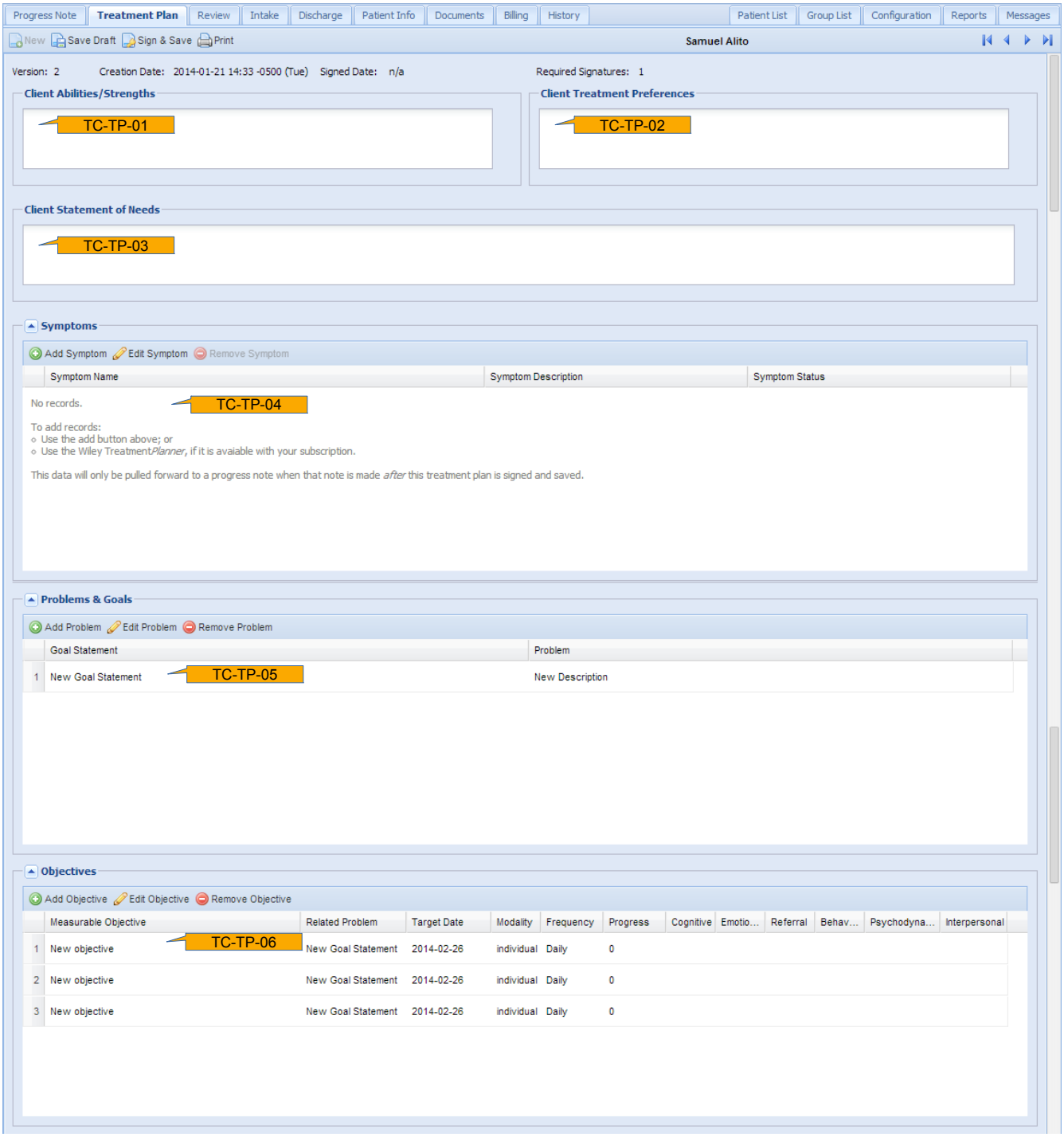
Progress Note



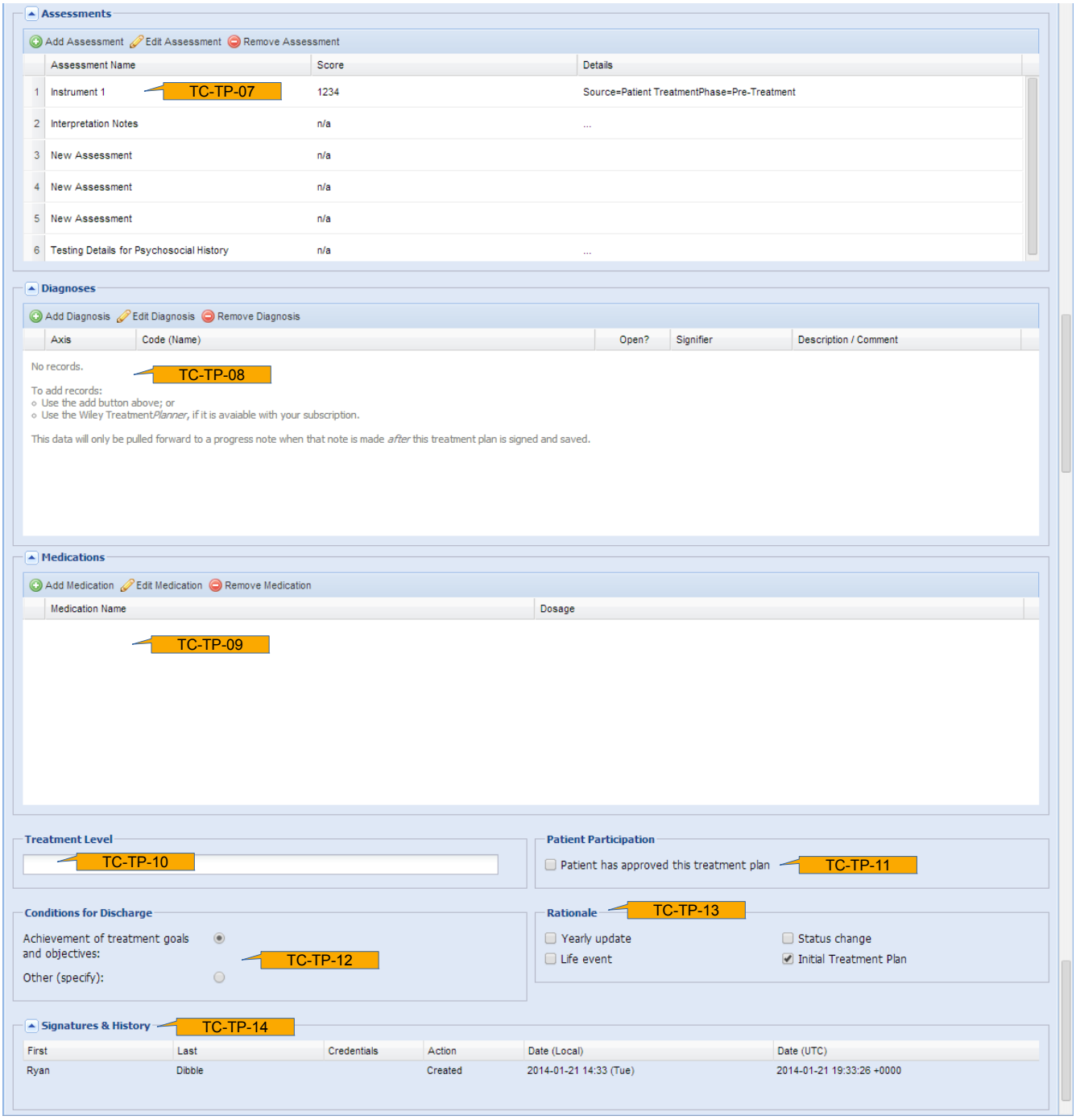
Progress Note (continued)



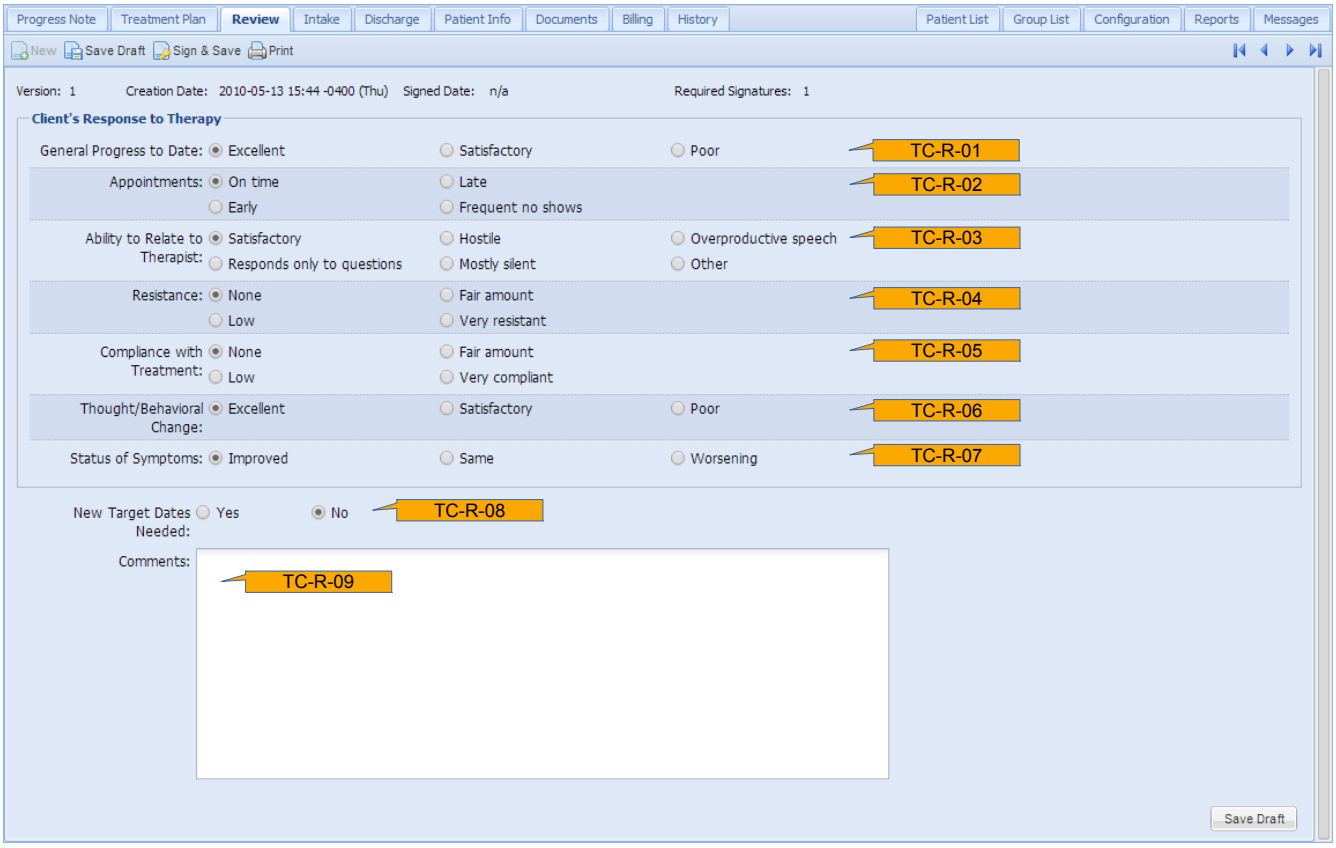
Treatment Plan



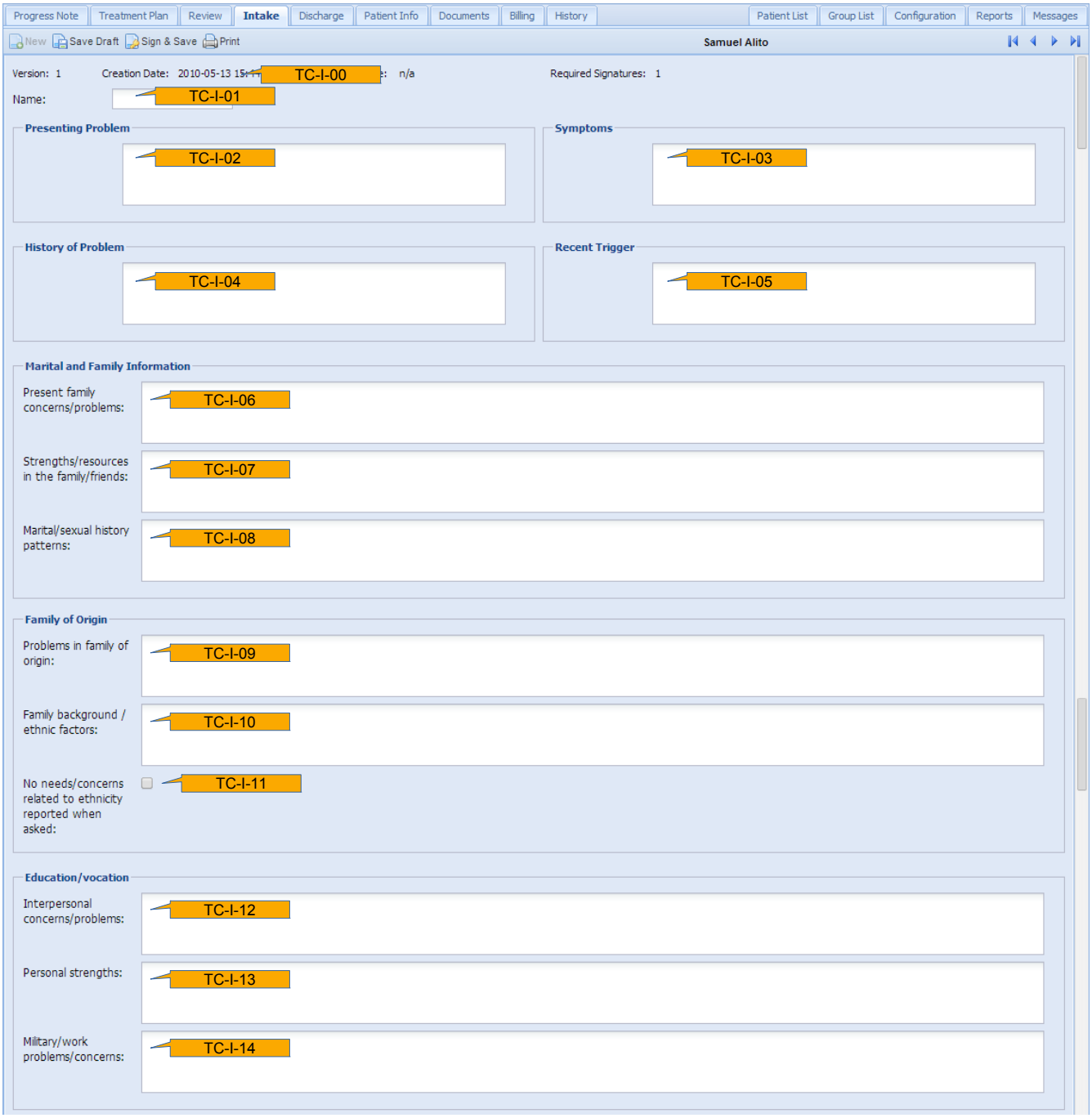
Treatment Plan (continued)



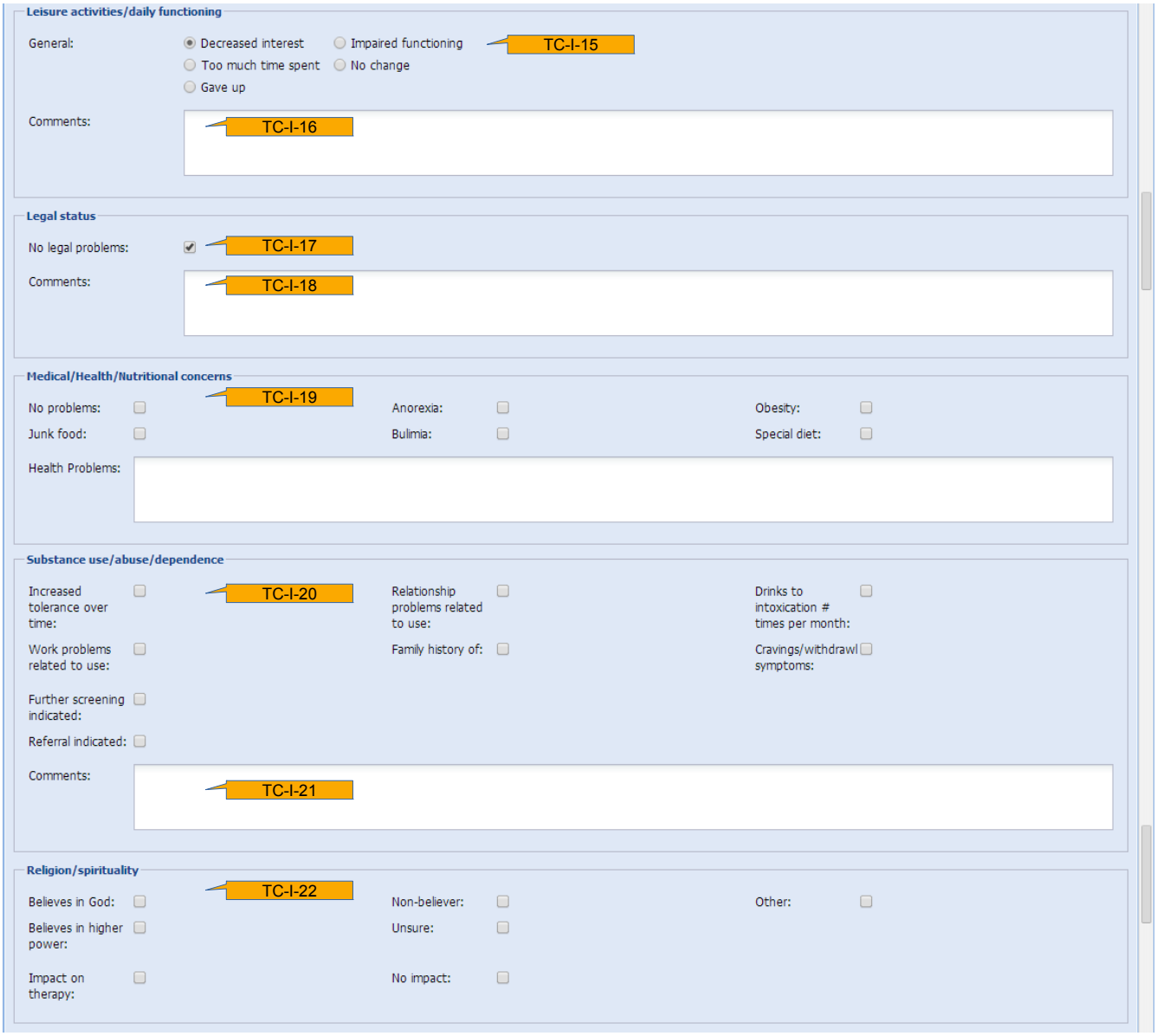
Review


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: Excellent Satisfactory Poor
TC-R-01
Appointments: On time Late Early Frequent no shows
TC-R-02
Ability to Relate to Therapist: Satisfactory Hostile Overproductive speech Responds only to questions Mostly silent Other
TC-R-03
Resistance: None Fair amount Low Very resistant
TC-R-04
Compliance with Treatment: None Fair amount Low Very compliant
TC-R-05
Thought/Behavioral Change: Excellent Satisfactory Poor
TC-R-06
Status of Symptoms: Improved Same Worsening
TC-R-07
New Target Dates Needed: Yes No
TC-R-08
Comments:
TC-R-09
Save Draft

Intake

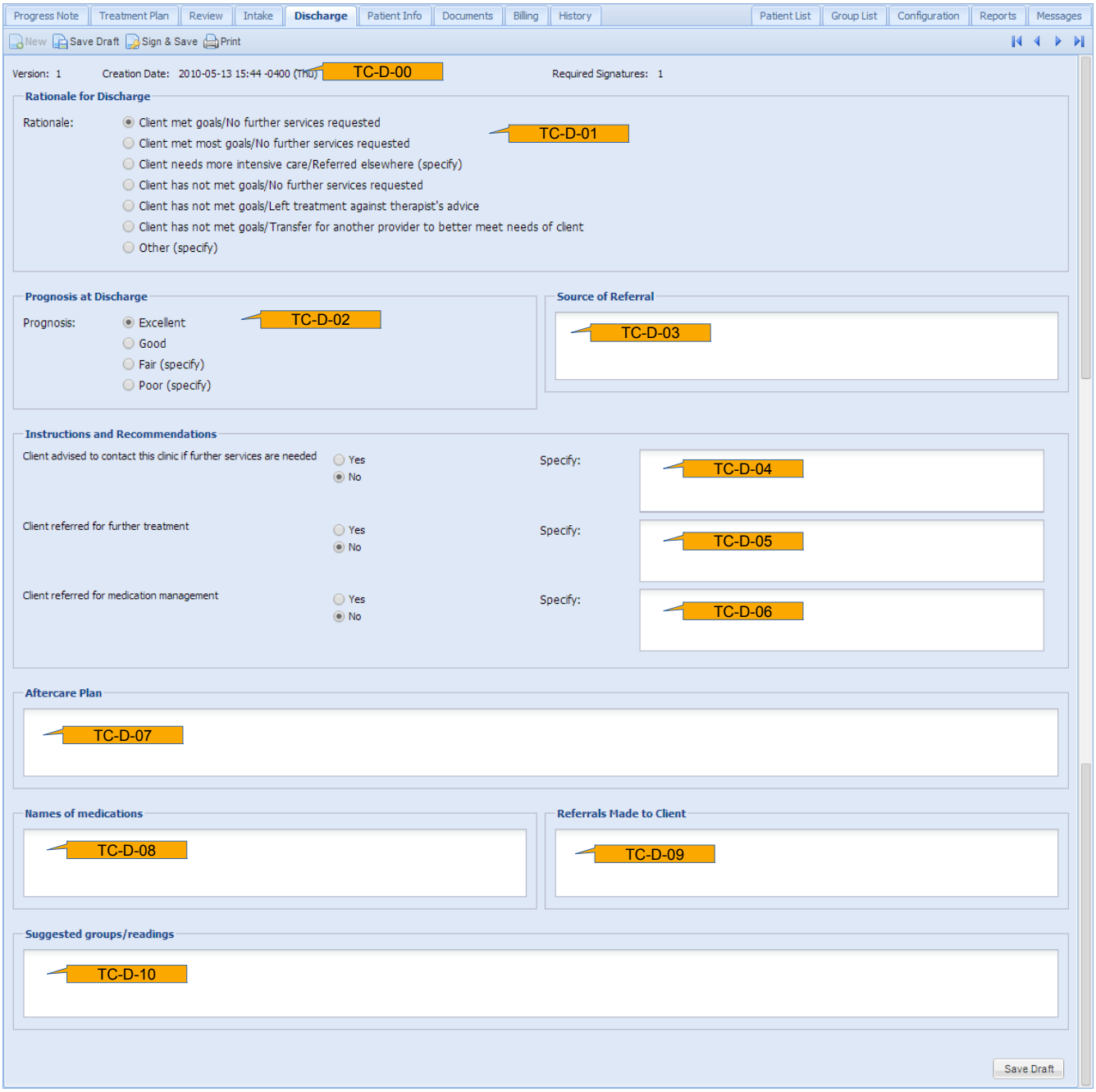

Progress Note
Treatment Plan
Review
Intake
Discharge
Patient Info
Documents
Billing
History
Patient List
Group List
Configuration
Reports
Messages
New
Save Draft
Sign & Save
Print
Samuel Alito
Version: 1
Creation Date: 2010-05-13 15:11
TC-I-00
n/a
Required Signatures: 1
Name:
TC-I-01
Presenting Problem
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)



Intake (continued)

Discharge


Progress Note
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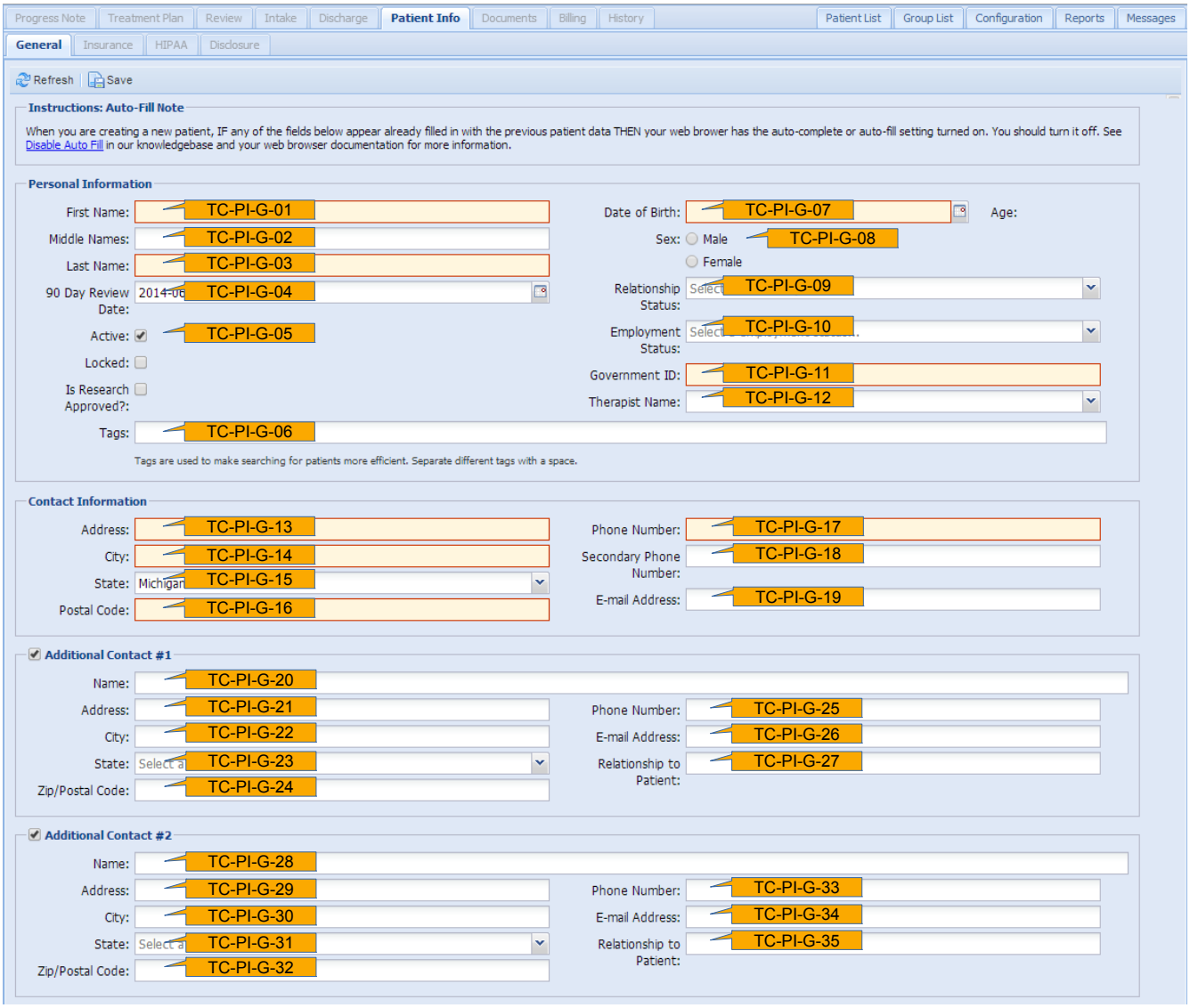
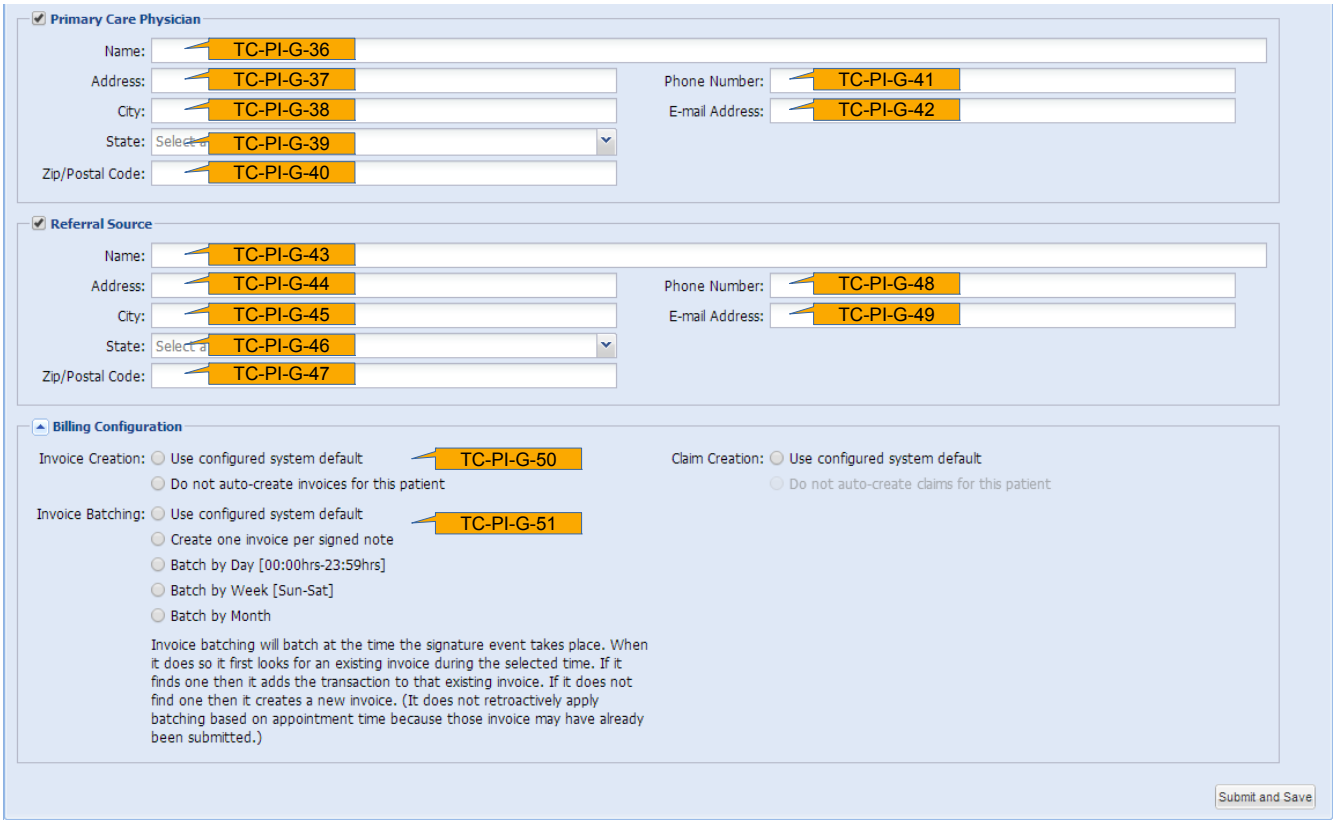
History
Patient List
Group List
Configuration
Reports
Messages
New
Save Draft
Sign & Save
Print
Version: 1
Creation Date: 2010-05-13 15:44 -0400 (Thu)
TC-D-00
Required Signatures: 1
Rationale for Discharge
Rationale:
Client met goals/No further services requested
TC-D-01
Client met most goals/No further 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
TC-D-03
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
TC-D-07
Names of medications
TC-D-08
Referrals Made to Client
TC-D-09
Suggested groups/readings
TC-D-10
Save Draft

Patient Info – General

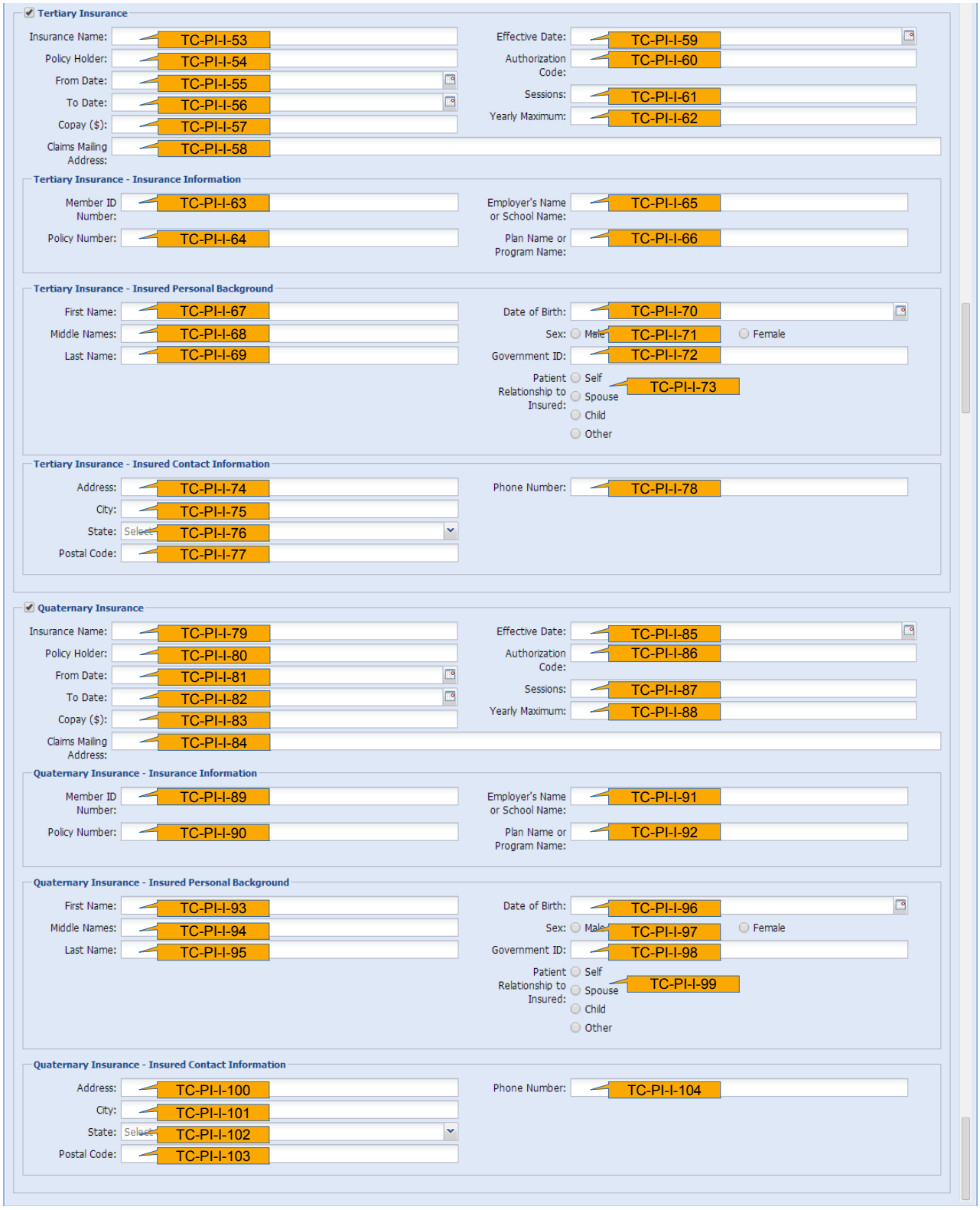


Patient Info – General (continued)

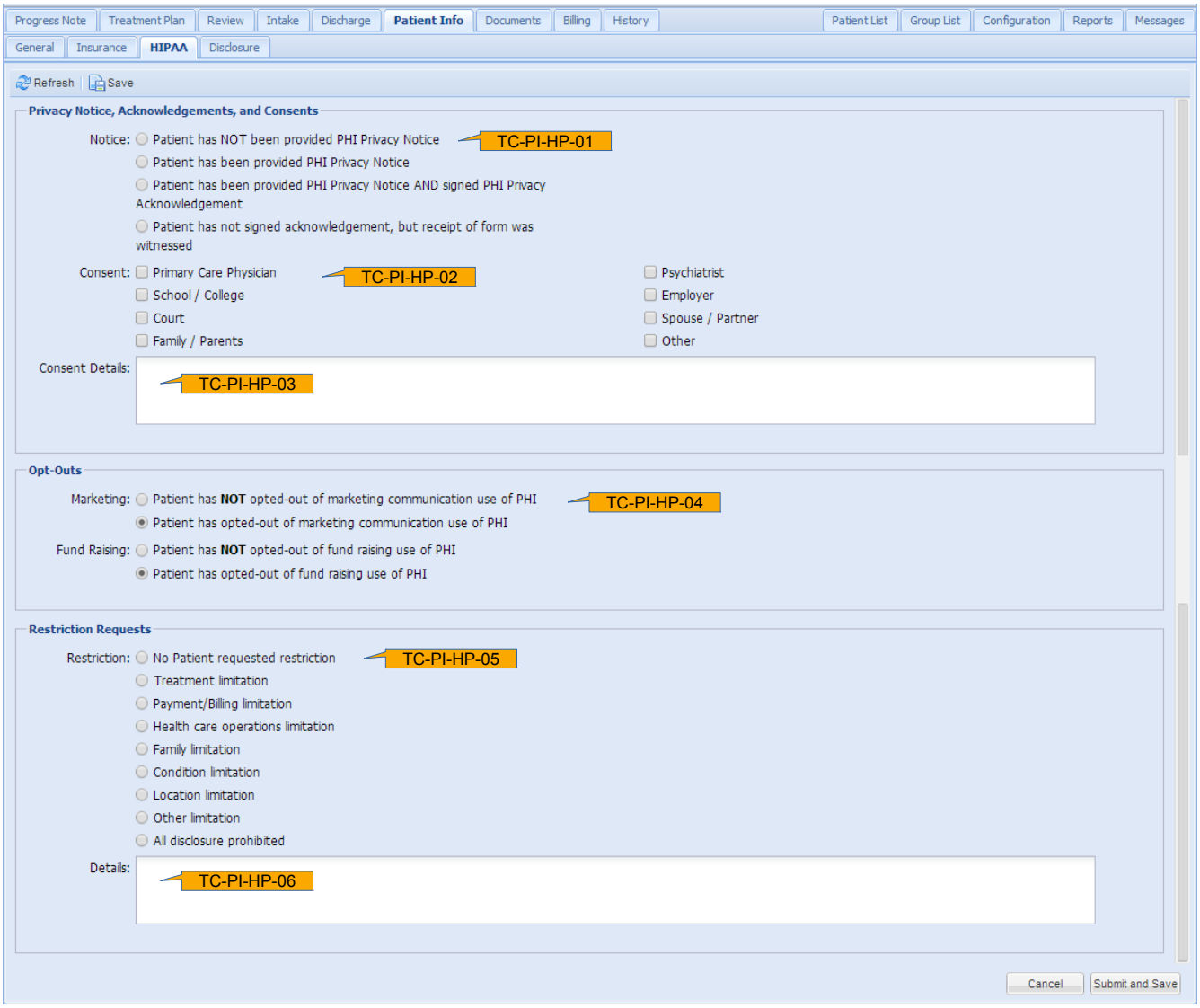


Patient Info – Insurance

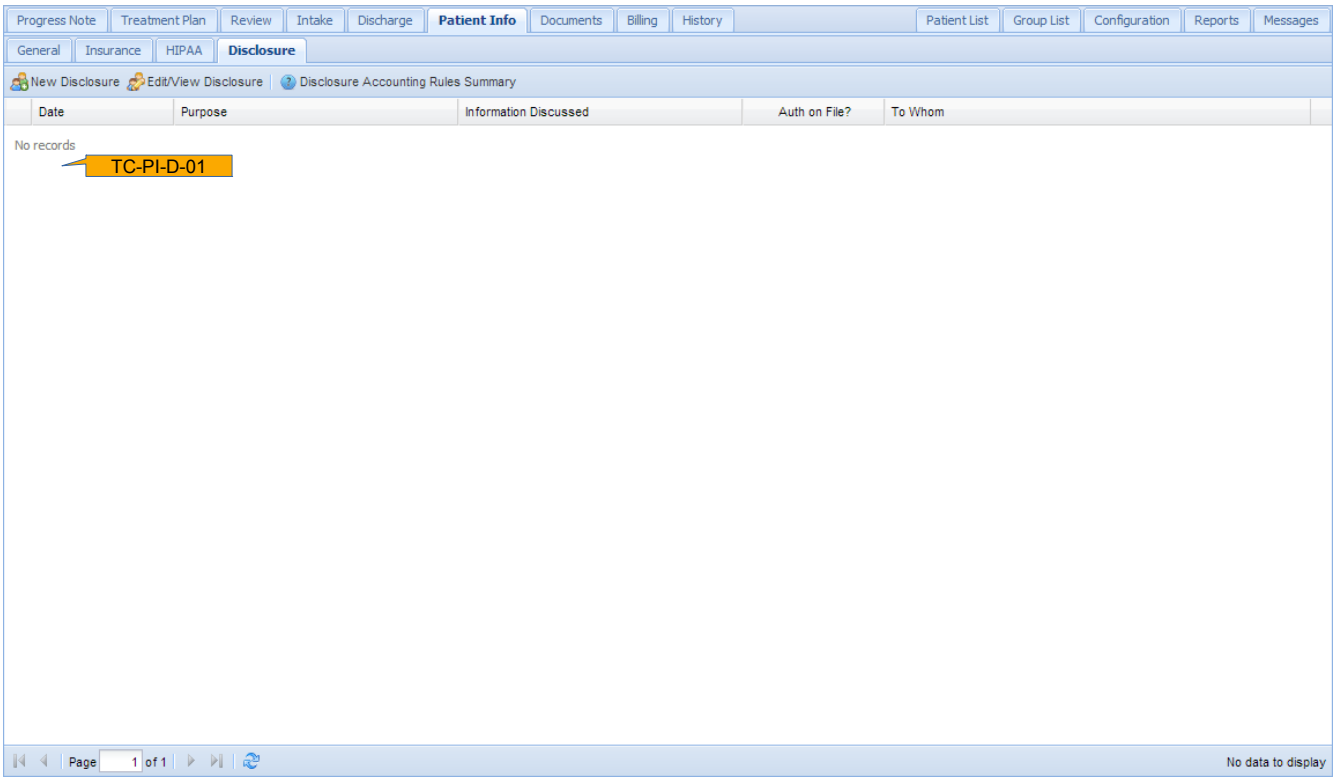
Patient Info - Insurance (continued)



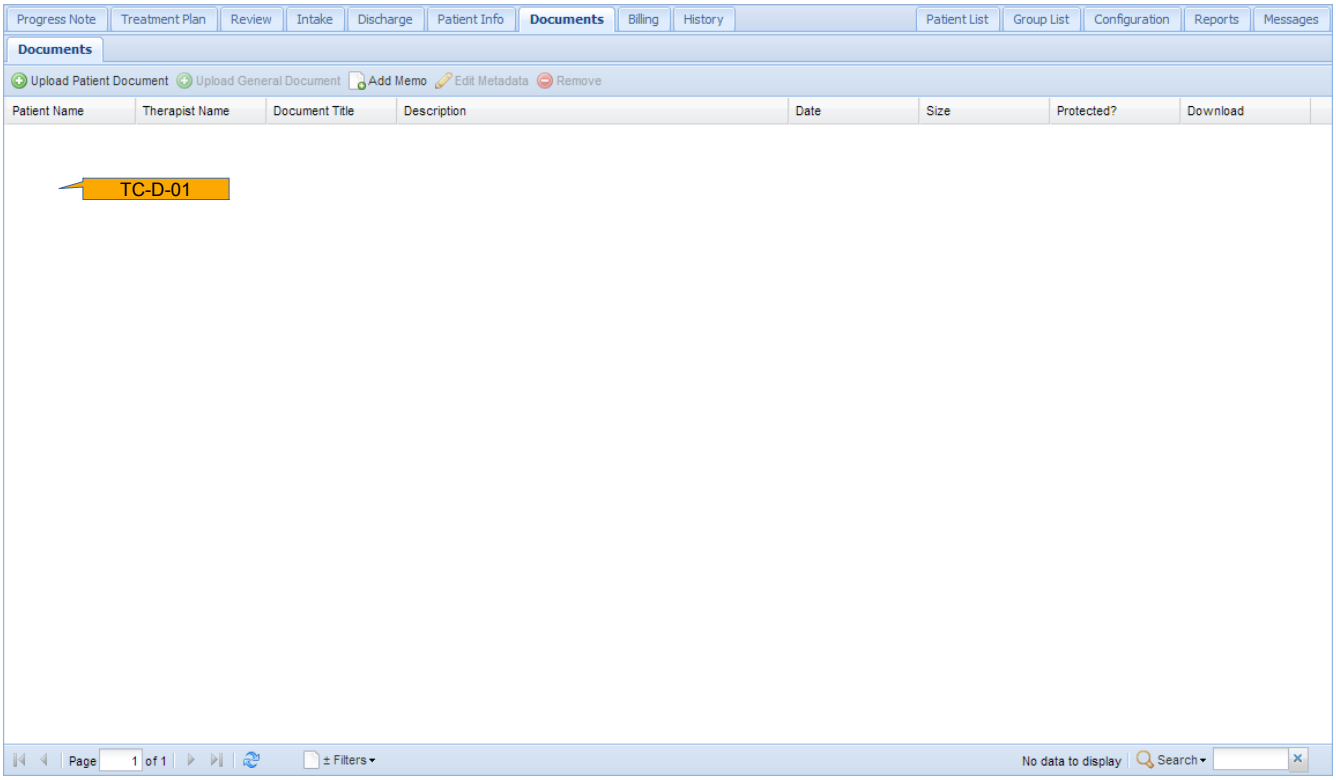
Patient Info - HIPAA



Patient Info – Disclosure



Documents



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%”

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

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

		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