



Tc[®]
Therapy Charts

TheraScribe 5 Import Guide

Import Guide Version 1.0, 2014-03-13

TheraScribe[®]



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How To Use This Guide

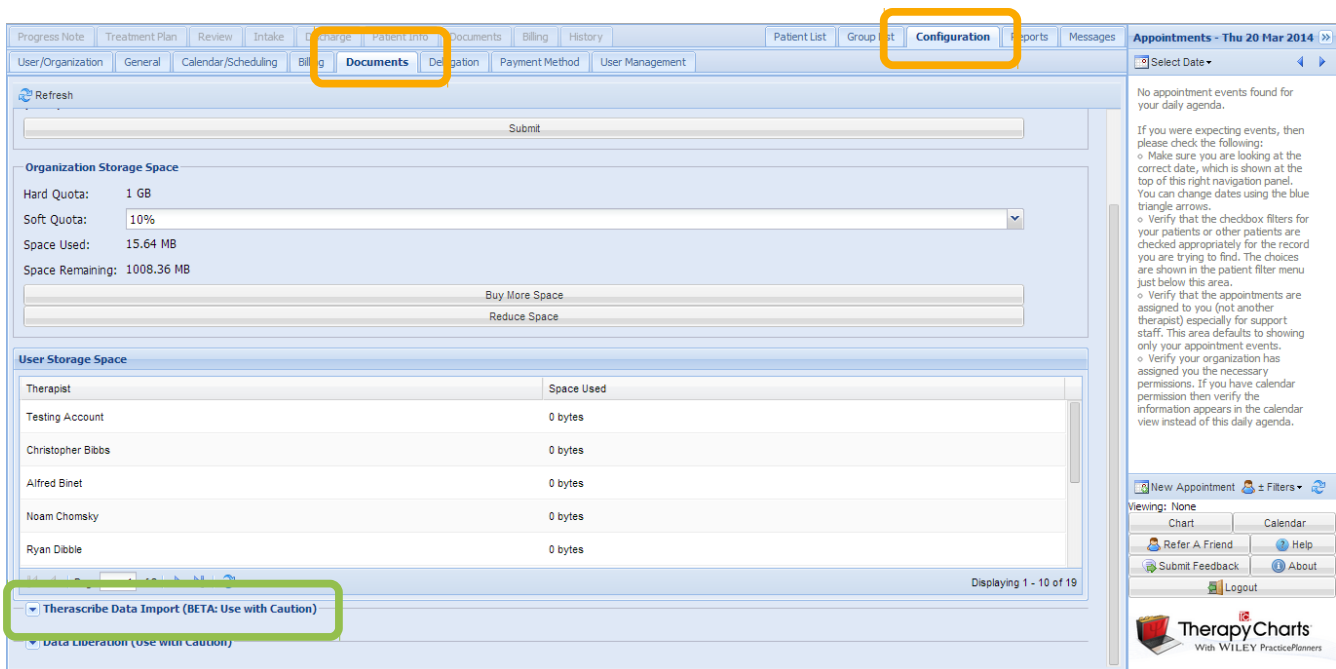
This guide will enable you to determine where each field in TheraScribe may be found in TherapyCharts after you have finished your import. The guide contains screen shots of every part of both the TheraScribe and TherapyCharts interface. Each element of the user interface is labeled with a code. For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

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 Last Name MI

ID Number SSN Birth Date TS-PD-D-05 Age

Address

Address 1

Address 2

City State / Province Postal Code

Misc.

Home Phone

Email Address

Military Rank

Employer

Work Phone

Primary Care Physician

Psychiatrist

Is an Active Patient ☐

Had Previous Treatment ☐

Other Info

Referred By

Marital Status

Race

Gender TS-PD-D-22

Setting

Department

Treatment Start TS-PD-D-25

Last Review TS-PD-D-26

Treatment End 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

Title

License (State)

Degree

Supervisor

Name

Title

License (State)

Degree

Treatment Team/Group

Team Member

File Go Help

Home Select Patient Add Patient

Personal Data

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

Personal Data

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

Insurance

Patient:

Insurance Carriers

| Name | Phone | Gatekeeper | Active | |
|------------|-------|------------|--------|---|
| TS-PD-I-01 | | | | <input type="button" value="Add"/> <input type="button" value="Delete"/> |

Authorized Sessions

| Auth Date | # Sessions | Start Date | End Date | Authorization # | |
|------------|------------|------------|----------|-----------------|---|
| TS-PD-I-02 | | | | | <input type="button" value="Add"/> <input type="button" value="Delete"/> |

Sessions

Total Sessions Authorized TS-PD-I-03

Sessions Used 5 TS-PD-I-04

Remaining Sessions

File

Go

Help

Home

Select Patient

Add Patient

Personal Data

Demographics

Provider

Insurance

General Notes

Attachments

Episode Custom Fields

HIPAA

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

General Notes

Patient:

General Notes

B

I

U

ABC

ABC

Arial

8

TS-PD-GN-01

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

FileGoHelp

Home

Select Patient

Add Patient

Personal Data

Demographics

Provider

Insurance

General Notes

Attachments

Episode Custom Fields

HIPAA

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Attachments

Patient:

| Description | File Type | File Name | File Size |
|-------------|-----------|-----------|-----------|
| TS-PD-A-01 | | | |

Add

Delete

Open File

Save As

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

FileGoHelp

Home

Select Patient

Add Patient

Personal Data

Demographics

Provider

Insurance

General Notes

Attachments

Episode Custom Fields

HIPAA

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Episode Custom Fields

Patient:

Minimum Sessions Required

6,000

TS-PD-ECF-01

Projected Start Date

1/1/2000

TS-PD-ECF-02

File Go Help

Home Select Patient Add Patient

Personal Data

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

Personal Data

HIPAA

Patient:

Patient Privacy Notice Log of Patient Record Access

☒ Patient was provided PHI Privacy Notice TS-PD-HP-01 [View Access Log](#)

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

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

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 |

The screenshot displays the 'Psychosocial History' form within an EMR application. The form is titled 'Psychosocial History' and includes a sidebar on the left with navigation options: Personal Data, Assessment, Treatment Plan, Progress, Prognosis / Discharge, Appointment Scheduler, and Reports. The main form area contains the following fields and labels:

- Patient:** A dropdown menu showing 'TS-A-PH-01'.
- Interviewer:** A dropdown menu showing 'TS-A-PH-02'.
- Date:** A text field showing '3/6/2014'.
- Person Interviewed:** A dropdown menu showing 'Patient'.
- Assessment Categories:** A row of tabs labeled 'Family', 'Developmental', 'Substance Abuse', 'Socio-Economic', 'Psychiatric', and 'Medical'. Each tab has an associated assessment code:
 - Family: TS-A-PH-04
 - Developmental: TS-A-PH-05
 - Substance Abuse: TS-A-PH-06
 - Socio-Economic: TS-A-PH-07
 - Psychiatric: TS-A-PH-08
 - Medical: TS-A-PH-09

The form also includes a 'Summary' section at the bottom, which is currently empty. The sidebar on the left has a 'Reports' section at the bottom, which is also empty.

Assessment – Strengths / Weaknesses

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

Strengths / Weaknesses

Patient:

Strengths

Description

Capable of Independence

TS-A-SW-01

Add Delete

Weaknesses

Description

Irresponsible

TS-A-SW-02

Add Delete

Assessment – Assessments Given

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

Assessments Given

Patient:

Instruments

| Date Tested | Instrument | Score | Data Source | Treatment Phase |
|-------------|--------------------|-------|-------------|-----------------|
| 3/6/2014 | Clinical Interview | | Patient | |
| 3/6/2014 | Family Assessment | | Patient | |

TS-A-AG-01

Add Delete

Testing Details for Family Assessment

B I U Arial 8

TS-A-AG-02

Interpretation Notes

B I U Arial 8

TS-A-AG-03

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

Mental Status

Patient:

Select the Date of the Evaluation

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

TS-A-MS-01

General Observations Thought Form/Content Risk Assessment Impression Summary

Presentation

Appearance: TS-A-MS-02

Mood: TS-A-MS-03

Attitude: TS-A-MS-04

Affect: TS-A-MS-05

Speech: TS-A-MS-06

Motor Activity: TS-A-MS-07

Orientation: TS-A-MS-08

Mental Functioning

Simple Calculations: TS-A-MS-12

Serial Sevens: TS-A-MS-13

Immediate Memory: TS-A-MS-14

Remote Memory: TS-A-MS-15

General Knowledge: TS-A-MS-16

Proverb Interpretation: TS-A-MS-17

Similarities / Differences: TS-A-MS-18

Higher Order Abilities

Judgment: TS-A-MS-09

Insight: TS-A-MS-10

Intelligence: TS-A-MS-11

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

Mental Status

Patient:

Select the Date of the Evaluation

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

TS-A-MS-19

Thought Process

- ☐ Logical and Organized
- ☐ Illogical
- ☐ Loose Associations
- ☐ Tangential
- ☐ Disorganized
- ☐ Flight of Ideas
- ☐ Blocking
- ☐ Obsessive

TS-A-MS-20

Delusions

- ☐ None Evident
- ☐ Persecutory
- ☐ Actions Controlled
- ☐ Thoughts Controlled
- ☐ Grandiosity
- ☐ Bizarre
- ☐ Somatic
- ☐ Infidelity

TS-A-MS-21

Hallucinations

- ☐ None Evident
- ☐ Auditory
- ☐ Visual
- ☐ Olfactory

Assessment – Mental Status – Risk Assessment

File Go Help
Home Select Patient Add Patient

Assessment

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

Mental Status

Patient:

Select the Date of the Evaluation

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

General Observations Thought Form/Content Risk Assessment Impression Summary

Suicide **TS-A-MS-22**

Risk
Last Date

Violence **TS-A-MS-23**

Risk
Last Date

Child Abuse **TS-A-MS-24**

Risk
Last Date

Partner Abuse **TS-A-MS-25**

Risk
Last Date

Elder Abuse **TS-A-MS-26**

Risk
Last Date

Assessment – Mental Status – Impression Summary

File Go Help
Home Select Patient Add Patient

Assessment

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

Mental Status

Patient:

3/17/2014 Delete

General Observations Thought Form/Content Risk Assessment Impression Summary

Impression Summary

TS-A-MS-27

Assessment – Recovery

File Go Help
Home Select Patient Add Patient

Assessment
Psychosocial History
Strengths / Weaknesses
Assessments Given
Mental Status
Recovery
Summary

Recovery

Patient:
ASAM Patient Placement Criteria - 2R
Date Assessed: 3/17/2014
Add Delete
TS-A-R-01

Six Dimensions - Severity
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
Recovery / Living Environment: TS-A-R-07

Level of Care Selected: TS-A-R-08

Comment
B I U abe Arial 8
TS-A-R-09

Stage of Change Assessment
Problem Assessed Date Assessed Stage of Change Add Delete
TS-A-R-10

Comment
B I U abe Arial 8
TS-A-R-11

Assessment – Summary

File Go Help
Home Select Patient Add Patient

Assessment
Psychosocial History
Strengths / Weaknesses
Assessments Given
Mental Status
Recovery
Summary

Summary

Patient:
Assessment Summary
B I U abe Arial 8
TS-A-S-01

Treatment Plan – Problem

FileGoHelp

Home

Select Patient

Add Patient

Treatment Plan

Problem

Definitions

Goals

Objectives / Interventions

Modality

Approach

Diagnosis

Response

Unassigned

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Problem

Patient: final_fname final_name

Assign Clinical Pathway

Primary Problem

Attachment DisorderTS-TP-P-01Select

Secondary Problems

Problem

Academic UnderachievementTS-TP-P-02AddDeleteMake Primary

Other Problems (not focus of treatment)

Problem

Blended FamilyTS-TP-P-03AddDelete

Treatment Plan – Definitions

FileGoHelp

Home

Select Patient

Add Patient

Treatment Plan

Problem

Definitions

Goals

Objectives / Interventions

Modality

Approach

Diagnosis

Response

Unassigned

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Definitions

Patient:

Behavioral Definitions for Attachment DisorderTS-TP-D-01

Behavioral Definition

Three years old or older and has no significant bond with any caregiver.TS-TP-D-02AddDelete

Lines 0

Treatment Plan – Goals

File Go Help
Home Select Patient Add Patient

Treatment Plan

- Problem
- Definitions
- Goals**
- Objectives / Interventions
- Modality
- Approach
- Diagnosis
- Response
- Unrecorded

Goals

Patient:

Long Term Goals for Attachment Disorder TS-TP-G-01

| Goal | Add | Delete |
|--|-----|--------|
| Capable of forming warm physical and emotional bonds with the parents. | | |
| TS-TP-G-02 | | |

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
- Unrecorded

Objectives / Interventions

Patient:

Objectives for Attachment Disorder TS-TP-OI-01

| Objective | Target Date | Entry Date | Sessions | Critical | Add | Delete |
|-------------|-------------|------------|----------|----------|-----|--------|
| TS-TP-OI-02 | | | | | | |

Lines 2

Interventions ☐ Display all Interventions for the Selected Problem

| Intervention | Entry Date | Sessions | Provider | Add | Delete |
|--------------|------------|----------|----------|-----|--------|
| TS-TP-OI-03 | | | | | |

Lines 1

Treatment Plan – Modality

File Go Help
Home Select Patient Add Patient

Treatment Plan

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

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

B I U Arial 8

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

Approach

Patient:

Approaches

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

Add Delete

Approach Note

B I U Arial 8

TS-TP-A-02

Medications Prescribed

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

Add Delete

Medication Note for

B I U Arial 8

TS-TP-A-04

Treatment Plan – Diagnosis

The screenshot shows the 'Definitions' window within the 'Treatment Plan' section. The left sidebar contains a list of icons for various functions: Problem, Definitions (selected), Goals, Objectives / Interventions, Modality, Approach, Diagnosis, Response, Personal Data, Assessment, Treatment Plan, Progress, Prognosis / Discharge, Appointment Scheduler, and Reports. The main area is titled 'Definitions' and has a 'Patient:' field. Below this, there is a 'Behavioral Definitions for' dropdown menu showing 'Attachment Disorder'. To the right of this dropdown is a yellow label 'TS-TP-DG-01'. Below the dropdown is a 'Behavioral Definition' text area containing the text 'Three years old or older and has no significant bond with any caregiver.' To the right of this text is a yellow label 'TS-TP-D-02'. On the far right, there are 'Add' and 'Delete' buttons. At the bottom right, there is a 'Lines' field with the value '0'.

Treatment Plan – Response

The screenshot shows the 'Response' window within the 'Treatment Plan' section. The left sidebar is the same as in the previous screenshot, with 'Response' now selected. The main area is titled 'Response' and has a 'Patient:' field. Below this, there is a 'Response to Treatment Plan' text area. Above this text area is a toolbar with icons for bold, italic, underline, text color, background color, font size, and a dropdown menu showing 'Arial' and '8'. To the right of the text area is a yellow label 'TS-TP-R-01'. Below the 'Response to Treatment Plan' text area is a 'Significant Other's Response to Treatment Plan' text area. Above this text area is a similar toolbar with icons for bold, italic, underline, text color, background color, font size, and a dropdown menu showing 'Arial' and '8'. To the right of the text area is a yellow label 'TS-TP-R-02'.

Treatment Plan – Homework

FileGoHelp

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

Homework

Patient:

Homework for

Attachment Disorder

TS-TP-H-01

Objectives

Objective

Target Date

TS-TP-H-02

Lines

2

Homework

Title

Date Assigned

Provider

Add

Delete

Launch

TS-TP-H-03

Goals of Exercise

TS-TP-H-04

Suggestions

TS-TP-H-05

Progress – Session Details

FileGoHelp

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

Session Details

Patient:

TS-P-SD-01

Date

Start

End

Provider

Lock Date

Add

Delete

Copy

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

TS-P-SD-02

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

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

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

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

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

Psychotherapy Notes

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

Psychotherapy Notes

TS-P-PN-01

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

Amendments

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

Amendments

| Date Entered | Amendment |
|--------------|-----------|
| | TS-P-A-01 |

Add

Progress – Session Custom Fields

FileGoHelp

HomeSelect PatientAdd 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

Session Custom Fields

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

Prognosis / Discharge – Prognosis Details

FileGoHelp

HomeSelect PatientAdd Patient

Prognosis / Discharge

Prognosis Details

Discharge Details

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Prognosis Details

Patient:

Percent of Critical Objectives Required for Discharge

70%

TS-PD-PD-01

Projected Number of Sessions Before Treatment End

TS-PD-PD-02

Projected Date of Treatment End

3/6/2014

TS-PD-PD-03

Prognosis Rating of Successful Achievement of Goals

Good

TS-PD-PD-04

Rationale for Prognosis Rating

B I U

8

Arial

TS-PD-PD-05

File

Go

Help

Home

Select Patient

Add Patient

+

Prognosis / Discharge

Prognosis Details

Discharge Details

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Discharge Details

Patient:

Discharge Criteria

Description

Consistent abstinence from mood-altering illicit drugs or alcohol.

TS-PD-DD-01

Add

Delete

Competency to Manage Self-Care

Competent

TS-PD-DD-02

Competency to Manage Financial Resources

TS-PD-DD-03

Follow-up Care

TS-PD-DD-04

Referral Made to

TS-PD-DD-05

Placement Recommendation

TS-PD-DD-06

Vocational Plan

TS-PD-DD-07

Actual Treatment End Date

TS-PD-DD-08

Aftercare Plan / Discharge Summary

B

I

U

ab

ABC

Arial

8

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

NewSave DraftSign & SavePrint

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

Date

Start Date:TC-PN-01

End Date:TC-PN-02

Time

Start Time:TC-PN-03

End Time:TC-PN-04

Symptoms

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

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 plans 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:

☐ Compliance

☐ Instructed to Contact Psychiatrist

☐ Non-Compliance

☐ N/A

☐ Side Effect

TC-PN-08

Safety:

☐ Suicidal

☐ None

☐ Homicidal

TC-PN-09

Current Risk:

☐ Low

☐ Moderate

TC-PN-10

☐ High

TheraScribe 5 Import Guide

Page 24 of 45

Progress Note (continued)

Medications

| Medication Name | Dosage |
|---|--------|
| No records. TC-PN-11 | |
| <p>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.</p> <p>If you need to get your data into this grid:</p> <ol style="list-style-type: none">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 form3. Sign and Save that Treatment Plan4. Create a New Progress Note <p>That new treatment plans data will then be pulled forward into the new progress note.</p> | |

Objectives

| Measurable Objective | Target Date | Progress |
|---|-------------|----------|
| No records. TC-PN-12 | | |
| <p>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.</p> <p>If you need to get your data into this grid:</p> <ol style="list-style-type: none">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 form3. Sign and Save that Treatment Plan4. Create a New Progress Note <p>That new treatment plans data will then be pulled forward into the new progress note.</p> | | |

Client response **TC-PN-13**

☒ Full compliance ☐ Partial compliance ☐ Non-compliance

Service code **TC-PN-14**

90791

☒ CPT

☐ HCPCS

☐ ICD

☐ No Show

☐ Email

☐ Letter

☐ Phone Call

☐ Cancel/Reschedule

☐ Consultation

☐ Other

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. | | |
| <div>TC-TP-04</div> | | |

To add records:

- Use the add button above; or
- 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 *after* this treatment plan is signed and saved.

Problems & Goals

Add Problem
Edit Problem
Remove Problem

| Goal Statement | Problem |
|--|-----------------|
| 1 New Goal Statement <div>TC-TP-05</div> | New Description |

Objectives

Add Objective
Edit Objective
Remove Objective

| Measurable Objective | Related Problem | Target Date | Modality | Frequency | Progress | Cognitive | Emotio... | Referral | Behav... | Psychodyna... | Interpersonal |
|-------------------------------------|--------------------|-------------|------------|-----------|----------|-----------|-----------|----------|----------|---------------|---------------|
| 1 New objective <div>TC-TP-06</div> | 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 | | | | | | |

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. | | | | |

To add records:

- Use the add button above; or
- 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 *after* this treatment plan is signed and saved.

Medications

Add Medication Edit Medication Remove Medication

| Medication Name | Dosage |
|-----------------|--------|
| | |

Treatment Level

Patient Participation

☐ Patient has approved this treatment plan

Conditions for Discharge

Achievement of treatment goals and objectives: ☒

Other (specify): ☐

Rationale

☐ Yearly update ☐ Status change ☒ Initial Treatment Plan

☐ Life event

Signatures & History

| 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 | TC-R-02 | | | | | | | | |
| | | | <input type="radio"/> Early | <input type="radio"/> Frequent no shows | | | | | | | | | |
| Ability to Relate to Therapist: | | | <input checked="" type="radio"/> Satisfactory | <input type="radio"/> Hostile | <input type="radio"/> Overproductive speech | TC-R-03 | | | | | | | |
| | | | <input type="radio"/> Responds only to questions | <input type="radio"/> Mostly silent | <input type="radio"/> Other | | | | | | | | |
| Resistance: | | | <input checked="" type="radio"/> None | <input type="radio"/> Fair amount | TC-R-04 | | | | | | | | |
| | | | <input type="radio"/> Low | <input type="radio"/> Very resistant | | | | | | | | | |
| Compliance with Treatment: | | | <input checked="" type="radio"/> None | <input type="radio"/> Fair amount | TC-R-05 | | | | | | | | |
| | | | <input type="radio"/> Low | <input type="radio"/> Very compliant | | | | | | | | | |
| 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 Needed: | | | <input type="radio"/> Yes | <input checked="" type="radio"/> 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 15:44 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 <input type="radio"/> Too much time spent <input type="radio"/> No change <input type="radio"/> Gave up | TC-I-15 |
| 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 |
| Junk food: | <input type="checkbox"/> | Anorexia: <input type="checkbox"/> Obesity: <input type="checkbox"/> |
| | | Bulimia: <input type="checkbox"/> Special diet: <input type="checkbox"/> |
| Health Problems: | | |
| Substance use/abuse/dependence | | |
| Increased tolerance over time: | <input type="checkbox"/> | TC-I-20 |
| Work problems related to use: | <input type="checkbox"/> | Relationship problems related to use: <input type="checkbox"/> |
| Further screening indicated: | <input type="checkbox"/> | Family history of: <input type="checkbox"/> |
| Referral indicated: | <input type="checkbox"/> | Drinks to intoxication # times per month: <input type="checkbox"/> |
| Comments: | Cravings/withdrawal symptoms: <input type="checkbox"/> | |
| | TC-I-21 | |
| Religion/spirituality | | |
| Believes in God: | <input type="checkbox"/> | TC-I-22 |
| Believes in higher power: | <input type="checkbox"/> | Non-believer: <input type="checkbox"/> Other: <input type="checkbox"/> |
| Impact on therapy: | <input type="checkbox"/> | Unsure: <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 |
| | TC-I-23 | <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 |
| | TC-I-24 | |
| 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 |
| | TC-I-25 | <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 |
| | TC-I-26 | <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 |
| | TC-I-27 | <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 |
| | TC-I-28 | <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 |
| | TC-I-29 | |
| 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 |
| | TC-I-30 | <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 |
| | TC-I-31 | |
| 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 |
| | TC-I-32 | <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 |
| | TC-I-33 | <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 |
| | TC-I-34 | <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 |
| | TC-I-35 | <input type="checkbox"/> Other |
| Insight: | <input type="checkbox"/> Absent <input type="checkbox"/> Good | <input type="checkbox"/> Fair <input type="checkbox"/> Minimal |
| | TC-I-37 | <input type="checkbox"/> Other |
| Judgment: | <input type="checkbox"/> Good <input type="checkbox"/> Fair | <input type="checkbox"/> Poor <input type="checkbox"/> Other |
| | TC-I-38 | |
| Intelligence: | <input type="checkbox"/> High <input type="checkbox"/> Average | <input type="checkbox"/> Low <input type="checkbox"/> Retarded |
| | TC-I-39 | <input type="checkbox"/> Other |
| Comments: | TC-I-40 | |
| Diagnostic Summary | | |
| 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

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

| | | | | | | | | | | | | | |
|---|----------------|--------|--------|-----------|---------------------|-----------|---------|---------|--------------|------------|---------------|---------|----------|
| 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 browser 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: | TC-PI-G-01 | Date of Birth: | TC-PI-G-07 | Age: |
| Middle Names: | TC-PI-G-02 | Sex: | <input type="radio"/> Male <input checked="" type="radio"/> Female | |
| Last Name: | TC-PI-G-03 | Relationship Status: | TC-PI-G-09 | |
| 90 Day Review Date: | 2014-06-TC-PI-G-04 | Employment Status: | TC-PI-G-10 | |
| Active: | <input checked="" type="checkbox"/> TC-PI-G-05 | Government ID: | TC-PI-G-11 | |
| Locked: | <input type="checkbox"/> | Therapist Name: | TC-PI-G-12 | |
| Is Research Approved?: | <input type="checkbox"/> | | | |
| Tags: | TC-PI-G-06 | | | |

Tags are used to make searching for patients more efficient. Separate different tags with a space.

Contact Information

| | | | |
|--------------|---------------------|-------------------------|------------|
| Address: | TC-PI-G-13 | Phone Number: | TC-PI-G-17 |
| City: | TC-PI-G-14 | Secondary Phone Number: | TC-PI-G-18 |
| State: | Michigan TC-PI-G-15 | E-mail Address: | TC-PI-G-19 |
| Postal Code: | TC-PI-G-16 | | |

☒ **Additional Contact #1**

| | | | |
|------------------|---------------------|--------------------------|------------|
| Name: | TC-PI-G-20 | Phone Number: | TC-PI-G-25 |
| Address: | TC-PI-G-21 | E-mail Address: | TC-PI-G-26 |
| City: | TC-PI-G-22 | Relationship to Patient: | TC-PI-G-27 |
| State: | Select a TC-PI-G-23 | | |
| Zip/Postal Code: | TC-PI-G-24 | | |

☒ **Additional Contact #2**

| | | | |
|------------------|---------------------|--------------------------|------------|
| Name: | TC-PI-G-28 | Phone Number: | TC-PI-G-33 |
| Address: | TC-PI-G-29 | E-mail Address: | TC-PI-G-34 |
| City: | TC-PI-G-30 | Relationship to Patient: | TC-PI-G-35 |
| State: | Select a TC-PI-G-31 | | |
| Zip/Postal Code: | TC-PI-G-32 | | |

Patient Info – General (continued)

| | |
|---|---------------------|
| <input checked="" type="checkbox"/> Primary Care Physician | |
| Name: | TC-PI-G-36 |
| Address: | TC-PI-G-37 |
| City: | TC-PI-G-38 |
| State: | Select a TC-PI-G-39 |
| Zip/Postal Code: | TC-PI-G-40 |
| Phone Number: | TC-PI-G-41 |
| E-mail Address: | TC-PI-G-42 |

| | |
|--|---------------------|
| <input checked="" type="checkbox"/> Referral Source | |
| Name: | TC-PI-G-43 |
| Address: | TC-PI-G-44 |
| City: | TC-PI-G-45 |
| State: | Select a TC-PI-G-46 |
| Zip/Postal Code: | TC-PI-G-47 |
| Phone Number: | TC-PI-G-48 |
| E-mail Address: | TC-PI-G-49 |

| | |
|--|---|
| <input checked="" type="checkbox"/> Billing Configuration | |
| Invoice Creation: | <input type="radio"/> Use configured system default TC-PI-G-50 <input type="radio"/> Do not auto-create invoices for this patient |
| Claim Creation: | <input type="radio"/> Use configured system default <input type="radio"/> Do not auto-create claims for this patient |
| Invoice Batching: | <input type="radio"/> Use configured system default TC-PI-G-51 <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 |
| <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> | |

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 |
|---|----------------|--------|--------|---|---------------------|-----------|---------|---------|--------------|------------|---------------|---------|----------|
| <div>General Insurance HIPAA Disclosure</div> <div>Refresh Save</div> | | | | | | | | | | | | | |
| 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 TC-PI-I-19 <input type="radio"/> Female | | | | | | | | | |
| Last Name: TC-PI-I-17 | | | | Government ID: TC-PI-I-20 | | | | | | | | | |
| | | | | Patient Relationship to Insured: <input type="radio"/> Self TC-PI-I-21 <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Other | | | | | | | | | |
| Primary Insurance - Insured Contact Information | | | | | | | | | | | | | |
| Address: TC-PI-I-22 | | | | Phone Number: TC-PI-I-26 | | | | | | | | | |
| City: TC-PI-I-23 | | | | | | | | | | | | | |
| State: Select 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 TC-PI-I-45 <input type="radio"/> Female | | | | | | | | | |
| Last Name: TC-PI-I-43 | | | | Government ID: TC-PI-I-46 | | | | | | | | | |
| | | | | Patient Relationship to Insured: <input type="radio"/> Self TC-PI-I-47 <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Other | | | | | | | | | |
| Secondary Insurance - Insured Contact Information | | | | | | | | | | | | | |
| Address: TC-PI-I-48 | | | | Phone Number: TC-PI-I-52 | | | | | | | | | |
| City: TC-PI-I-49 | | | | | | | | | | | | | |
| State: Select TC-PI-I-50 | | | | | | | | | | | | | |
| Postal Code: TC-PI-I-51 | | | | | | | | | | | | | |

Patient Info - Insurance (continued)

| 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 checked="" type="radio"/> Male TC-PI-I-71 <input type="radio"/> Female |
| Government ID: | TC-PI-I-72 |
| Patient Relationship to Insured: | <input checked="" type="radio"/> Self TC-PI-I-73 <input type="radio"/> Spouse <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 TC-PI-I-76 |
| Postal Code: | TC-PI-I-77 |
| Phone Number: | TC-PI-I-78 |
| 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 |
| Quaternary Insurance - Insurance Information | |
| Member ID Number: | TC-PI-I-89 |
| Policy Number: | TC-PI-I-90 |
| Employer's Name or School Name: | TC-PI-I-91 |
| Plan Name or Program Name: | TC-PI-I-92 |
| Quaternary Insurance - Insured Personal Background | |
| 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 checked="" type="radio"/> Male TC-PI-I-97 <input type="radio"/> Female |
| Government ID: | TC-PI-I-98 |
| Patient Relationship to Insured: | <input checked="" type="radio"/> Self TC-PI-I-99 <input type="radio"/> Spouse <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 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**
☐ School / College
☐ Court
☐ Family / Parents
☐ Psychiatrist
☐ Employer
☐ Spouse / Partner
☐ 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 NoteTreatment PlanReviewIntakeDischargePatient InfoDocumentsBillingHistoryPatient ListGroup ListConfigurationReportsMessages

GeneralInsuranceHIPAADisclosure

New DisclosureEdit/View DisclosureDisclosure Accounting Rules Summary

| Date | Purpose | Information Discussed | Auth on File? | To Whom |
|------------|---------|-----------------------|---------------|---------|
| No records | | | | |

TC-PI-D-01

Page 1 of 1No data to display

Documents

Progress NoteTreatment PlanReviewIntakeDischargePatient InfoDocumentsBillingHistoryPatient ListGroup ListConfigurationReportsMessages

Documents

Upload Patient DocumentUpload General DocumentAdd MemoEdit MetadataRemove

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

Page 1 of 1FiltersNo data to displaySearch

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>