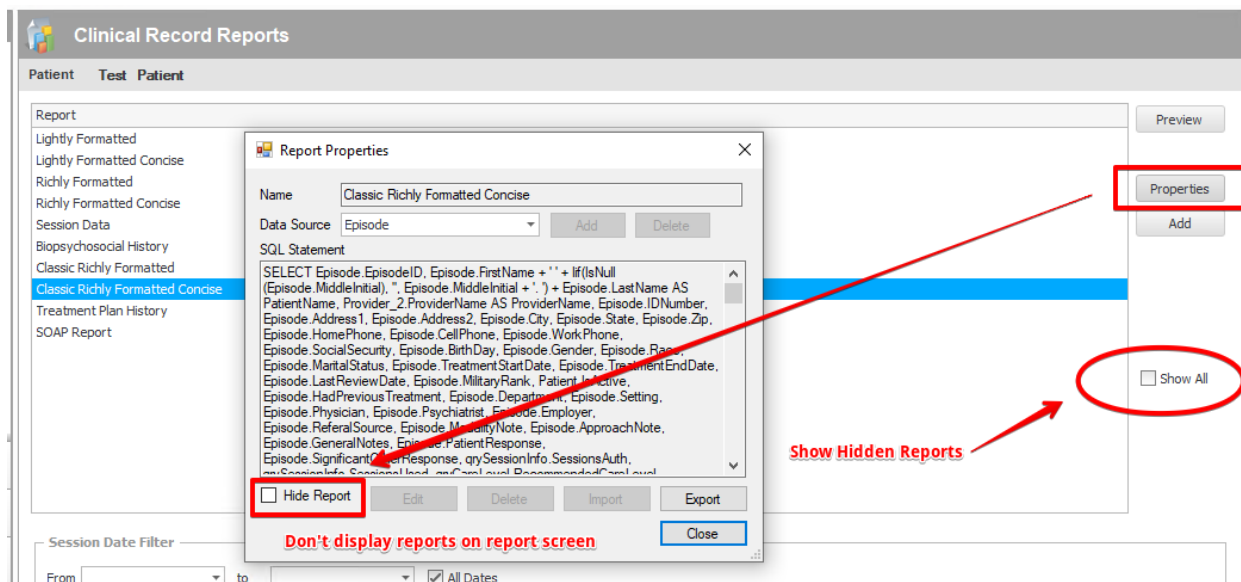


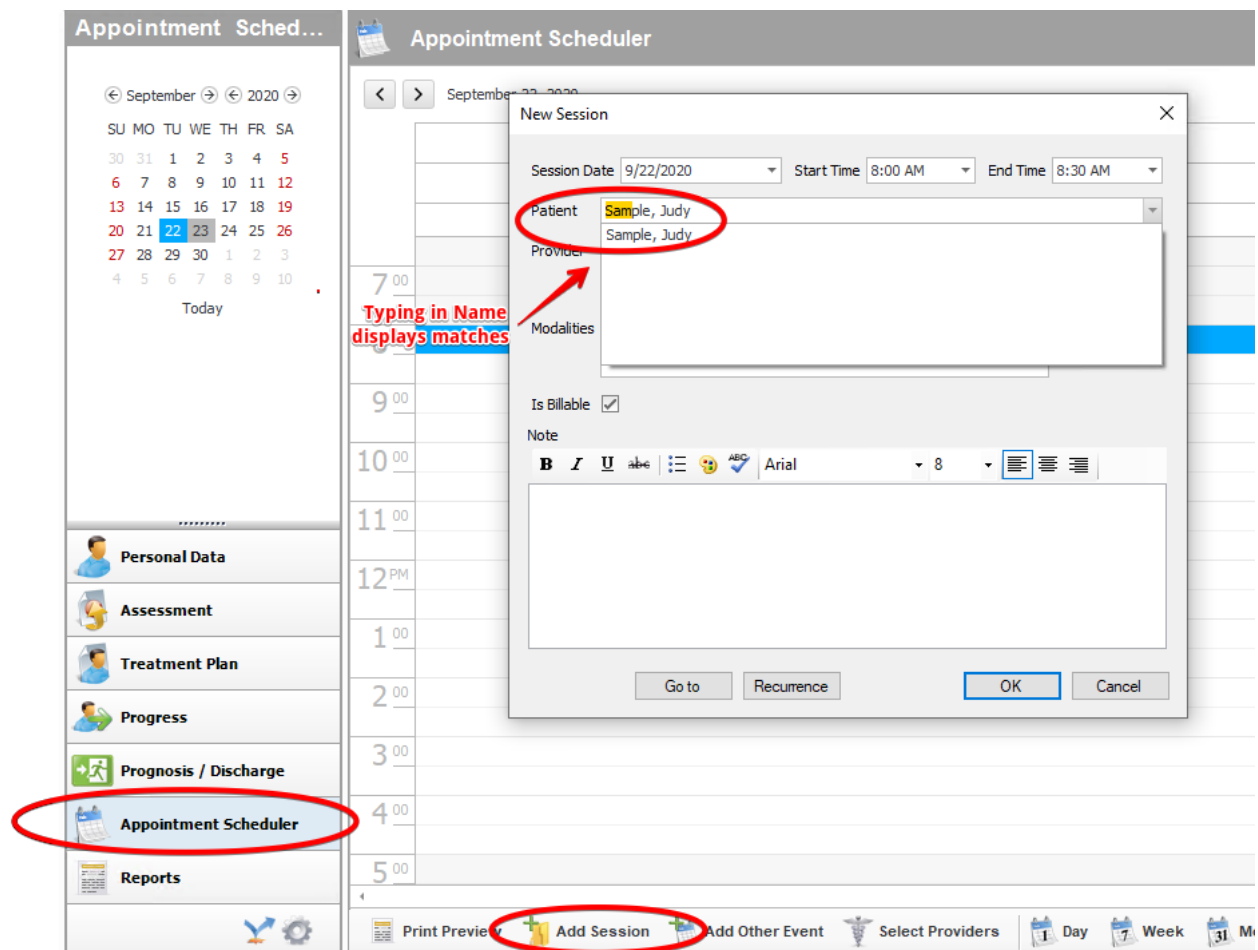
List of Enhancements to TheraScribe v. 20.1

* Be able to hide system and custom report formats not used

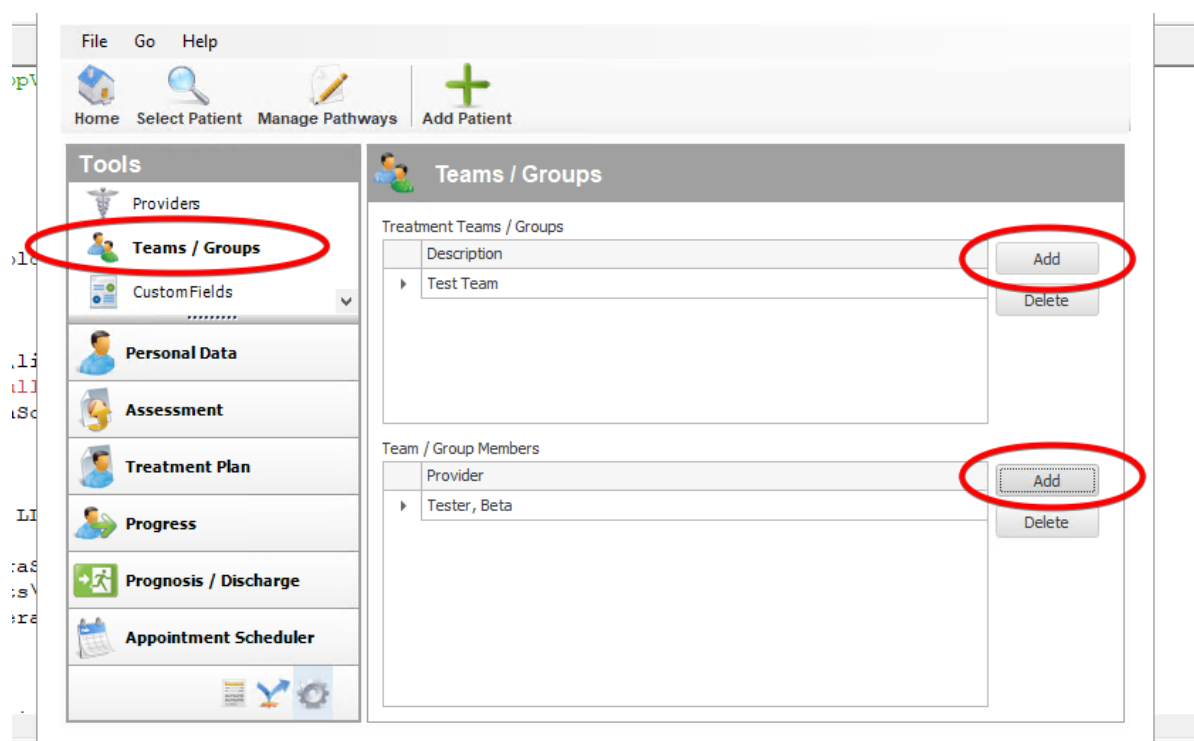
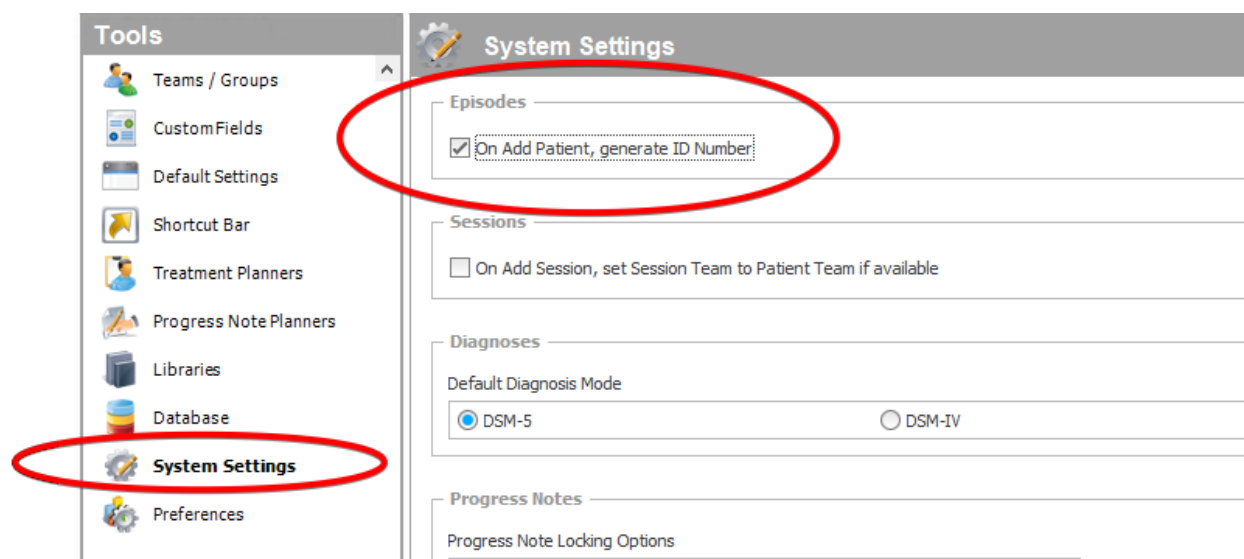


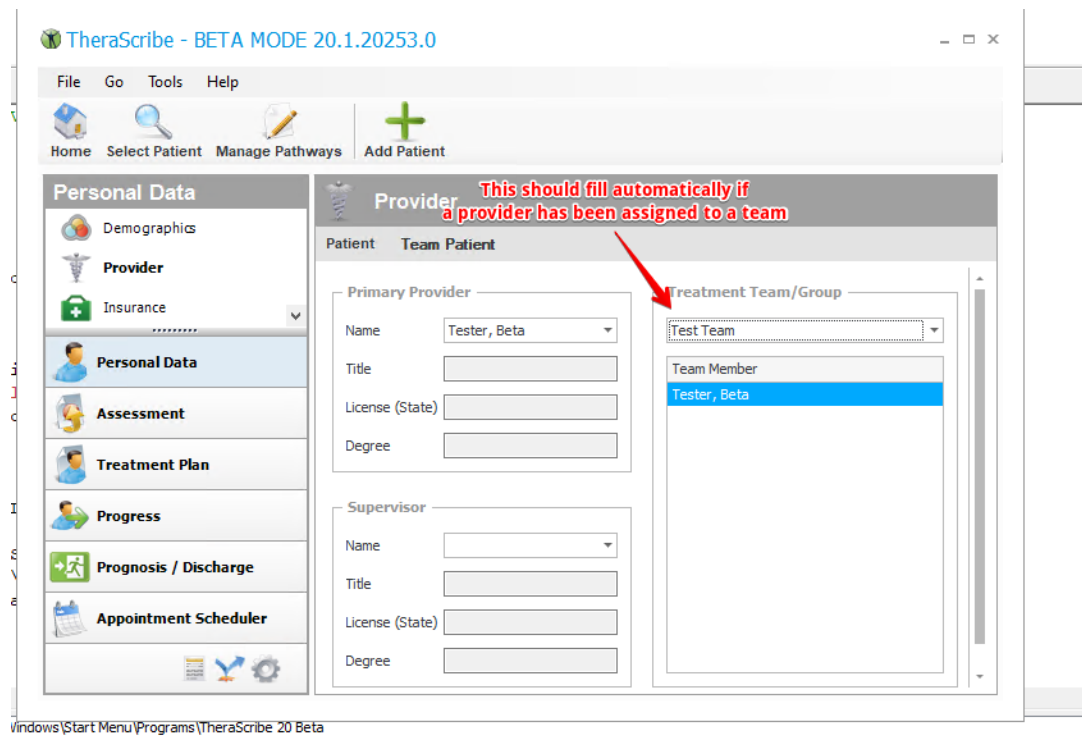
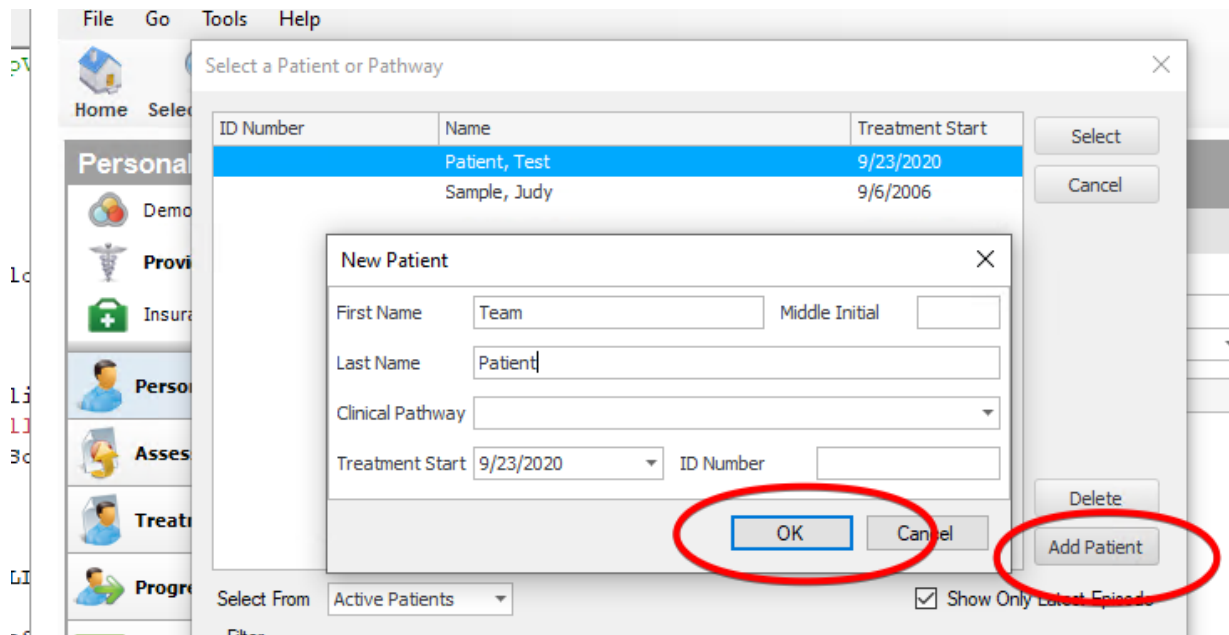
* Add search feature to Appt. screen

* Add Note to Add Session function on Appt. Screen like Add Other Event

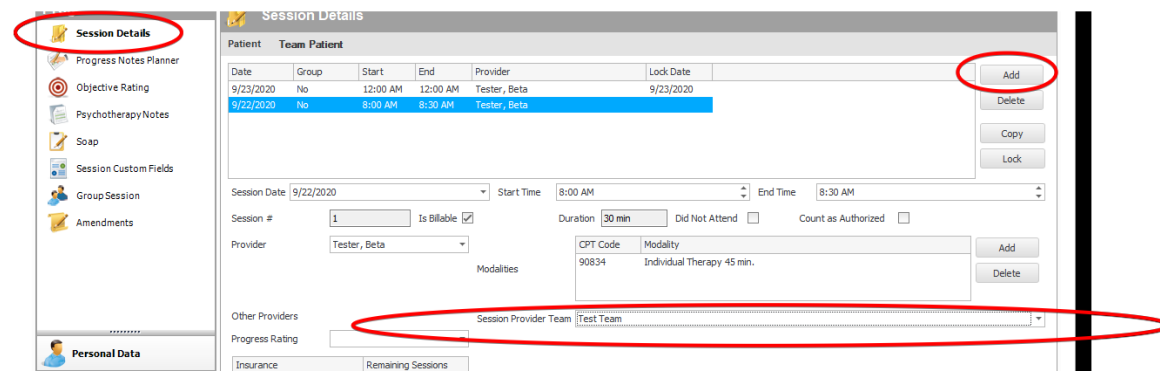


*** Automatically fill in Team Assignment when selecting Provider on Assessment\provider screen and on Session Details Screen**





The same behavior when adding a new session.



*** Option to generate Client IDs automatically**

The screenshot shows the 'System Settings' window. In the left-hand 'Tools' sidebar, the 'System Settings' item is circled in red. In the main 'System Settings' area, under the 'Sessions' section, the checkbox 'On Add Session, set Session Team to Patient Team if available' is checked and circled in red. Other visible settings include 'On Add Patient, generate ID Number' (unchecked), 'Default Diagnosis Mode' (set to DSM-5), and 'Progress Note Locking Options'.

This screenshot shows the 'System Settings' window with a 'New Patient' dialog box open. The dialog box contains fields for 'First Name', 'Middle Initial', 'Last Name', 'Clinical Pathway', 'Treatment Start' (9/23/2020), and 'ID Number' (000001). The 'ID Number' field is circled in red. At the bottom of the dialog, the 'Add Patient' button is circled in red. The background 'System Settings' window shows the 'Users' section with various checkboxes and the 'Automatic Backup' section.

* Add a SOAP note option to the PsychoTherapy Notes

Home Select Patient Manage Pathways Add Patient

Progress

- SessionDetails
- Progress Notes Planner
- Objective Rating
- Psychotherapy Notes
- Soap**
- Session Custom Fields
- Group Session
- Amendments

Personal Data

Assessment

Treatment Plan

Progress

Prognosis / Discharge

Appointment Scheduler

Reports

Soap

Patient Team Patient

Date	Group	Start	End	Provider	Lock Date	
9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta		Add Delete Copy

Subjective

Objective

Assessment

Plan

TheraScribe - BETA MODE 20.1.20253.0

File Go Tools Help

Home Select Patient Manage Pathways Add Patient

Progress

Soap

TheraScribe - BETA MODE 20.1.20253.0

File Go Tools Help

Home Select Patient Manage Pathways Add Patient

Soap

Patient Team Patient

Date	Group	Start	End	Provider	Lock Date	
9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta		Add Delete Copy

Subjective

Objective

Assessment

Plan

Form Layout Customization

Fields Save Cancel Reset

Layout Fields

- ☐ Empty Space
- ☐ Label
- ☐ Separator
- ☐ Splitter
- ☐ StartDateTime
- ☐ EndDateTime
- ☐ ProgressRating
- ☐ PsychotherapyNotes
- ☐ Modality
- ☐ CPTCode
- ☐ IsBillableContact
- ☐ LockDate
- ☐ LastChanged
- ☐ OutlookLink
- ☐ GroupSession
- ☐ Recurrence
- ☐ DidNotAttend
- ☐ CountAsAuthorized
- ☐ AppointmentNote
- ☐ Custom Fields
- ☐ Default

Fields and objects can be dragged and dropped or hidden. Custom Fields can be added under Tools/ Custom Fields.

*** Create/Display amendments on PsychoTherapy Notes screen when locking enabled**

When Locking is enabled:

The screenshot shows the 'System Settings' window. The left sidebar contains a 'Tools' menu with options: Providers, Teams / Groups, Custom Fields, Default Settings, Shortcut Bar, Treatment Planners, Progress Note Planners, Libraries, Database, System Settings (selected), and Preferences. The main area is titled 'System Settings' and contains several sections: 'Users Permissions' with checkboxes for 'Only the Primary Provider, Session Provider and Session Provider Team member can view Progress Notes' and 'Maintenance User can see Database screen on Tools Group'; 'Episodes' with a checkbox for 'On Add Patient, generate ID Number'; 'Sessions' with a checkbox for 'On Add Session, set Session Team to Patient Team if available'; 'Diagnoses' with a radio button selection for 'Default Diagnosis Mode' (DSM-5 is selected, DSM-IV is unselected); and 'Progress Notes' with a sub-section 'Progress Note Locking Options' containing four radio buttons: 'No Locking', 'Lock when leaving Progress Note Screen', 'Lock when leaving Patient', and 'Manual Locking (by Non Supervised Provider or Supervisor)'. The 'Manual Locking' option is selected and the entire section is circled in red.

The screenshot shows the 'Session Details' window. The left sidebar contains a 'Progress' menu with options: Session Details (selected), Progress Notes Planner, Objective Rating, Psychotherapy Notes, Soap, Session Custom Fields, Group Session, and Amendments. The main area is titled 'Session Details' and contains a table with columns: Date, Group, Start, End, Provider, and Lock Date. The table has one row with values: 9/23/2020, No, 12:00 AM, 12:00 AM, Tester, Beta. To the right of the table are buttons: Add, Delete, Copy, and Lock. The 'Lock' button is circled in red. Below the table, there are fields for Session Date (9/23/2020), Start Time (12:00 AM), End Time (12:00 AM), Session # (1), Is Billable (checked), Duration (0 min), Did Not Attend (unchecked), Count as Authorized (unchecked), Provider (Tester, Beta), Modalities, Other Providers, Progress Rating (No Change), Session Provider Team, Insurance, and Remaining Sessions. A dialog box titled 'TheraScribe' is displayed in the foreground with the text: 'The Session Note will be locked and you will not be able to make changes to it. Are you sure you want to lock the session?'. The dialog box has 'Yes' and 'No' buttons.

File Go Help

Home Select Patient Manage Pathways Add Patient

Progress

- SessionDetails
- Progress Notes Planner
- Objective Rating
- Psychotherapy Notes**
- Soap
- Session Custom Fields
- Group Session
- Amendments

Personal Data

Assessment

Treatment Plan

Progress

Psychotherapy Notes

Patient Team Patient

Date	Group	Start	End	Provider	Lock Date
9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta	9/23/2020

Add
Delete
Copy

Progress Notes are locked and not editable as is Progress Note Planner Screen

Psychotherapy Notes

Changes or updates can be added with amendments

Amendments

Date Entered	Amendment
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Add

* Added fields to Insurance Screen

Home Select Patient Manage Pathways Add Patient

Personal Data

- Demographics
- Provider
- Insurance**
- General Notes
- Attachments
- Session Custom Fields

Insurance

Patient Team Patient

Insurance Carriers

Name	Phone	Gatekeeper	Insurance ID	Group #	Policy Owner Name	Policy Owner DOB	Active
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Add
Delete