List of Enhancements to TheraScribe v. 20.1

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

👔 Clinical Record R	eports	
Patient Test Patient		
Report		Preview
Lightly Formatted Lightly Formatted Concise	💀 Report Properties 🛛 🗙	
Richly Formatted Richly Formatted Concise	Name Classic Richly Formatted Concise	Properties
Session Data Biopsychosocial History	Data Source Episode Add Delete SQL Statement	Add
Classic Richly Formatted Classic Richly Formatted Classic Richly Formatted Concise Treatment Plan History SOAP Report	SELECT Episode. Episode ID. Episode. First Name + '' + lf(IsNull (Episode Middlehntial), ", Episode. Rindthale + ', ') + Episode. Last Name AS Patient Name, Provider 2, ProviderName AS ProviderName, Episode. IDNumber, Episode. Address 1, Episode Address 2, Episode. State, Episode. Zpo, Episode. Koral Security, Episode. Address 2, Episode. State, Episode. Zpo, Episode. Social Security, Episode. Bruth. Patient Ventories, Episode. Zpo, Episode. Addresvou, Episode. CellPhone, Episode. Brance, Episode. Social Security, Episode. MittaryRank, Patient Ventorie, Episode. Martal Status, Episode. MittaryRank, Patient Ventorie, Episode. HadPrevious Treatment, Episode Employer, Episode. Prysician, Episode. Provinatins, Episode ApproachNote, Episode. ReferalSource, Episode Adpressol, Poisode ApproachNote,	Show All
	Episode GeneralNotes, Episode PatientResponse, Episode.Significant/ entResponse, qySessionInfo.SessionsAuth, Childe Report Edit Delete Import Exponent	
– Session Date Filter –	Don't display reports on report screen	
From	to I All Dates	

- * Add search feature to Appt. screen
- * Add Note to Add Session function on Appt. Screen like Add Other Event

Appointment Sched	Appointment Scheduler
€ September ∋ € 2020 ∋ SU MO TU WE TH FR SA	September no none New Session
30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 2 3	Session Date 9/22/2020 Start Time 8:00 AM End Time 8:30 AM Patient Sample, Judy Sample, Judy
4 5 6 7 8 9 10 Today	7 °° Typing in Name displays matches Modalities
	9 00 Is Billable 🗹
	Note B I U abe IE '9 Arial × 8 × IE IE
	11 00
🤰 Personal Data	12 ^{PM}
S Assessment	1 00
🦉 Treatment Plan	2 00 Go to Recurrence OK Cancel
Second Se	
Prognosis / Discharge	3
Appointment Scheduler	4.00
Reports	5.00
¥.©	🚆 Print Previe 👘 Add Session р Add Other Event 🍸 Select Providers 👘 Day 🍺 Week

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

	Tools	🎸 System Settings
	🍇 Teams / Groups	Episodes
	Custom Fields	Con Add Patient, generate ID Number
	Tefault Settings	
	🔊 Shortcut Bar	- Sessions
	Treatment Planners	On Add Session, set Session Team to Patient Team if available
	nogress Note Planners 🕺	□ Diagnoses
	ibraries	Default Diagnosis Mode
	🥃 Database	DSM-5 DSM-IV
<	🛷 System Settings 🔵	
	🇞 Preferences	Progress Notes
		Progress Note Locking Options

File Go Help	
Home Select Patient Manage Pathw Tools Providers	Add Patient Teams / Groups
LustomFields	Treatment Teams / Groups Description Add Test Team Delete
Personal Data	
Treatment Plan	Team / Group Members Provider Add Add
Progress Prognosis / Discharge	Delete
Appointment Scheduler	

	File	Go	Tools Help								
7 q		(Select a Patie	nt or Pathway)	×
	Home	Selec	ID Number	Na	me		Т	reatment 9	Start	Select	
	Pers	onal		Pat	tient, Test		9	/23/2020		beleet	
		Demo		Sar	mple, Judy		9	/6/2006		Cancel	
Lo	-	Provi		New Patient					×		
	Ē	Insura		First Name	Team		Middle Initi	al			
13	2	Perso		Last Name	Patient						-
L] ∃c	5	Asses		Clinical Pathway Treatment Start		▼ ID Numbe	r		•		
	2	Treati					ОК	Cantel		Delete Add Patient	-
СI		Progre	Select From	Active Patients	•			2	Show Only	Lolect Episode	-
- d			Elline a								

ile Go Tools Help	
ome Select Patient Manage Path	ways Add Patient
ersonal Data	This should fill automatically if a provider has been assigned to a team
🚱 Demographics	Patient Team Patient
🚏 Provider	
📬 Insurance 🗸 🗸	Primary Provider Freatment Team/Group
9 Personal Data	Name Tester, Beta Test Team T
Personal Data	Title Team Member
S Assessment	License (State)
Treatment Plan	Degree
Progress	- Supervisor
	Name
Prognosis / Discharge	Title
Appointment Scheduler	License (State)
🗏 🏏 🕸	Degree

The same behavior when adding a new session.

gress Notes Planner					1						
	Date	Group	Start	End	Provider		ck Date			A	dd 🌙
ective Rating	9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta	9/	23/2020				la la
chotherapy Notes	9/22/2020	No	8:00 AM	8:30 AM	Tester, Beta					De	lete
										C	ору
p											
sion Custom Fields										U	ock
	Session Date	9/22/2020			▼ Start Time 8:0	DO AM		End Time	8:30 AM		^
up Session	Jession Dute	5/22/2020						+ Lind hind	0.00 AM		-
ndments	Session #	1		Is Billable	Z Du	ration 30 min	Did Not Atten	d 🗌 Co	unt as Authorized		
	Provider	Te	ster, Beta	-		CPT Code Mo	dality			Ac	id .
					Modalities	90834 Ind	ividual Therapy 4	5 min.			
					Moualines					Del	ete
	Other Provide	ers			Session Provider Team	Test Team					Ŧ
						1					

* Option to generate Client IDs automatically

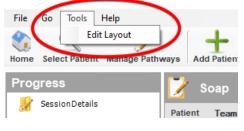
riie	оо пер	
Home	e Select Patient Manage Pathw	ays Add Patient
То		🏷 System Settings
🍇	Teams / Groups	Friender
	CustomFields	Episodes On Add Patient, generate ID Number
	Default Settings	
	Shortcut Bar	Sessions
	Treatment Planners	On Add Session, set Session Team to Patient Team if available
2	Progress Note Planners	□ Diagnoses
ų.	Libraries	Default Diagnosis Mode
	Database	O DSM-5
	System Settings	Promote Natar
	Preferences	Progress Note Locking Options

Inactivity Limi	t in Days	0 🌲 Set value to 0	to disable.				- Automat	tic Backup —	
Users Per	Select a Patient or Pat	hway					\times		
Only th	75 M - 1							in Days	7 🌲
✓ Mainter	ID Number	Name			Treatment Sta	art	Select	ctory	
Mainter		Patient, Team Patient, Test			9/23/2020 9/23/2020		Cancel		Browse
Tabs Maint (Maintenar	New Patient				×				
🗸 Gene	First Name			Middle Initial					
🖌 Attac	Last Name								
Custo	Clinical Pathwa	ау			-				
Episodes	Treatment Sta	rt 9/23/2020	ID Numbe	er 000001	>				
🗹 On Add				ОК	Cancel		Delete		
Sessions	Select From Active P	atients 🔻			Sh	-	dd Patient test Episode	/	
On Add	Filter Search Last Name	e v for]	Clear					
Diagnose	Last Marine			Clear					

* Add a SOAP note option to the PsychoTherapy Notes

	Home	Select Patient Manage Path	ways Add Pa	atient						
	Prog	gress SessionDetails	Patient T	eam Patient						
	1	Progress Notes Planner	Date	Group	Start	End	Provider	Lock Date		
	0	Objective Rating	9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta	LOCK Date	Ad	_
	Æ	Psychotherapy Notes							Dele	te
<		Soap							Co	ру
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	<u>_</u>	Group Session	Subjective							
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	<u>≯≮</u>	Prognosis / Discharge	Plan							
		Appointment Scheduler		I abe 🗄 💡	ABC Arial		• 8 • E = =			
		Reports								
		¥ ©								

TheraScribe - BETA MODE 20.1.20253.0



	Patient Team Pat	ent				
	Date Group 9/23/2020 No	Start End 12:00 AM 12:00 A	Provider IM Tester, Beta	Lock Date		D
fields and objects can be dragged and dropped or hidden. Sustom Fields can be added under Tools/ Sustom Fields.	Subjective B I U also :	🗏 🧐 💞 [Arial	- 8 - 1	F	Form Layout Customization	
	Objective B I U abe	E 🧐 💞 🗛	• 8 • 言言 = =		Layout Fields Enter exit to sear Emitty Spac A Labe Separator	
	Assessment B I U alles	= 🥲 💞 Arial	• 8 • 📰 = =		CPTCode Splitten IbBliableContact LockDate LastChanged OutlookLink CorcusSession	

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

When Locking is enabled:

Home Select Patient Manage Pathw	ways Add Patient
Tools	🏷 System Settings
Providers	
	Users Permissions
Custom Fields	Only the Primary Provider, Session Provider and Session Provider Team member can view Progress Notes
Default Settings	Maintenance User can see Database screen on Tools Group
Shortcut Bar	Tabs Maintenance Users can see on the Personal Data Screen (Maintenance Users always see the Demographics, Provider and Insurance tabs, but never the HIPAA tab)
Treatment Planners	General Notes
Progress Note Planners	Attachments
libraries	Custom Fields
🥃 Database	Episodes
🍻 System Settings	On Add Patient, generate ID Number
🍪 Preferences	
······	- Sessions
🧏 Personal Data	On Add Session, set Session Team to Patient Team if available
Signal Assessment	Diagnoses
The second set	Default Diagnosis Mode
S Treatment Plan	DSM-5 DSM-IV
Nogress	
Prognosis / Discharge	Progress Notes Progress Note Locking Options
Appointment Scheruler	No Locking Lock when leaving Progress Note Screen
Reports	Cock mich leaving Progress Hole Scient Cock when leaving Patient Manual Loding (by Non Supervised Provider or Supervisor)

File Go Tools Help													
Home	Select Patient Manage Pathe	ways Add Patie	ent										
Pro	gress	🦻 Sessi	ion Details										
8	Session Details	Patient Team Patient											
1	Progress Notes Planner	Date Group Start End Provider Lock Date											
0	Objective Rating		No	12:00 AM	12:00 AM	Tester, Beta	LOCK Date			Add			
E	PsychotherapyNotes									Delete			
	Soap									Сору			
	Session Custom Fields									Lock			
1	Group Session	Session Date	Session Date 9/23/2020 Start Time 12:00 AM End Time 12:00 AM										
1	Amendments	Session #	1		Is Billable 🗸	2 D	uration 0 min Did Not At	tend Count as Authorized 🗌 👋					
		Provider	Tester	, Beta	•		CF	×		Add			
						Modalities		ocked and you will not be able to make a you want to lock the session?		Delete			
	Personal Data	Other Providers Progress Rating			*	Session Provider Tea	m	Yes No		.			
		Insurance		Remaining	Sessions								

🛞 Th	eraScribe - BETA MODE	20.1.2025	3.0						_ 🗆 ×			
File	Go Help											
Nome	Select Patient Manage Pathy	ways Add Pa	atient									
Pro	gress	📔 Psy	chotherap	y Notes								
	SessionDetails	Patient Team Patient										
1	Progress Notes Planner											
0	Objective Rating	9/23/2020	No	12:00 AM	12:00 AM	Tester, Beta	9/23/2020		Add			
E	Psychotherapy Notes								Delete			
1	Soap								Сору			
	Session Custom Fields	Progress Notes are locked and not editable as is Progress Note Planner Screen										
	Group Session	Psychotherapy Notes										
7	Amendments											
~												
6	Personal Data											
	Personal Data											
5	Assessment						Changes or updates car	n be added with amendments				
1	Treatment Plan	Amendments Date Entere										
-		Date Entere	Amendmer	n.					Add			
	Progress											

* Added fields to Insurance Screen

Home Select Patient Manage	Pathways Add Patient								
Personal Data	Insurance								
Demographics	Patient Team Patient								
	Insurance Carriers Name	Phone	Gatekeeper	Insurance ID	Group #	Policy Owner Name	Policy Owner DOB	Active	Add
General Notes									Delete
Attachments									
The second contraction of the									