



Product Brief

ClinicTracker: An Overview

Manage your behavioral healthcare practice with a comprehensive and flexible solution



With over a decade of experience in the industry, we guarantee that a team of knowledgeable and experienced professionals will support you every step of the way.



Sweeping functionality made simple

In collaboration with clinicians and administrators nationwide, we developed ClinicTracker to address the special requirements of mental health and chemical dependence agencies. Proven through years of daily use and continual enhancement, ClinicTracker will streamline your operation, improve staff productivity, help protect you from regulatory non-compliance, and enhance your bottom-line profitability. You won't find a more intuitive, efficient, or well-accepted program anywhere.

Intake to discharge EMR management:

- Record referral sources and reasons
- Log dates of sequential intake events
- Assign clients into groups and subgroups
- Document family information and links to family members
- Record insurance information for multiple insurers
- Transmit prescriptions electronically



Clinic management:

- Track missed appointments by staff or client
- Analyze caseloads by program, service, or date
- Determine clinician availability
- Track revenue by clinician or program
- Manage the compliance process
- Benefit from administrative productivity tools and reports
- Track insurance preauthorization and HIPAA consent forms

Clinician productivity:



- Complete Progress Notes and other paperwork electronically
- Streamline supervisory documentation approvals
- Facilitate concurrent documentation
- Communicate and collaborate with other staff
- Capture digital signatures using a mouse, tablet, or touch-screen device

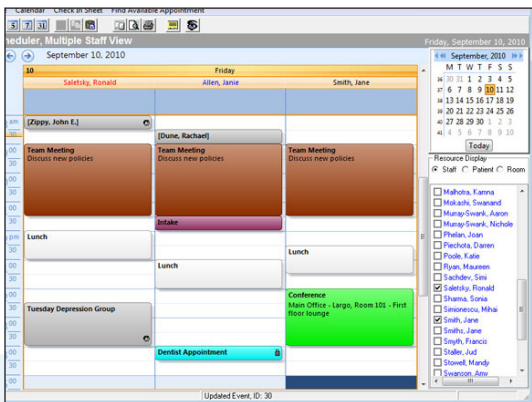
Implementation:



- Ease staff resistance with quick start guides and video training help
- Manage an agency with multiple locations
- Host ClinicTracker either on your on-site server or through a SaaS type implementation (best for small practices with limited IT resources)

Selected system features:

- Comprehensive scheduling:
 - o Schedule patients, staff, and rooms
 - o Grant other users access to your schedule information
 - o Integrate with Microsoft MapPoint for automatic route planning
 - o Capture mileage for expense management
 - o Add a new appointment to the Scheduler and our integrated Reminder Call Service will automatically generate appointment reminder calls

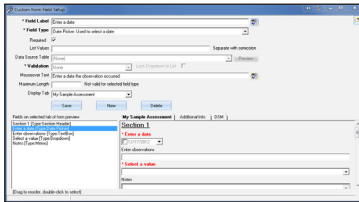




- Forms management: Pre-stored and custom forms as well as external documents

- o Pre-stored Forms:

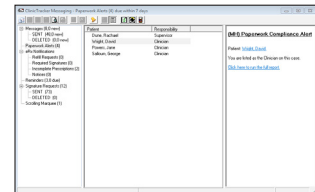
- Intake Assessment
- Admission Note
- Discharge Summary
- Treatment Plan
- Psychological Testing
- Progress Notes
- Lab Summary
- Case Review
- And many, many more...



- o Custom Forms - The Form Builder allows you to create digital forms that capture whatever patient or program information you require
- o External Documents – Link scanned documents and files directly to patient records

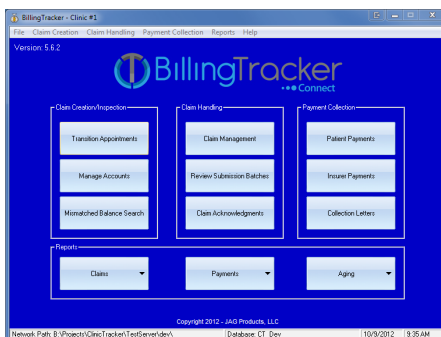
- Compliance tracking:

- o Monitor all required documentation
- o Automate reports and alerts



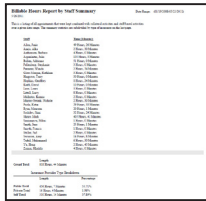
- BillingTracker - Integrated claims and billing:

- o Generate claims and statements
- o Manage payments
- o Utilize built-in sample reports



- Claims and Balances
- Payment Report
- Credit Balance Report
- Aging by Patient, Clinician, or Insurer
- And many more

- o Integrate with Sage 100 Fund Accounting
- o Offer an integrated Credit Card Processing Service



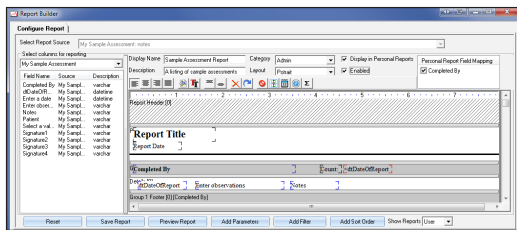
- Comprehensive reporting module - pre-stored and custom reports

- o Pre-stored reports regarding:

- Patients, staff, clinical activities, finances

- o Custom reports:

- ClinicTracker Report Builder gives you complete control over the content and design of a report – without a programmer’s assistance
- Create and customize a report in minutes based on current templates that come with ClinicTracker or forms you create with our Custom Form Builder utility

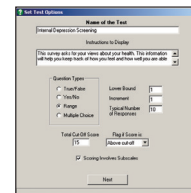


- Messaging system:

- o Internal notifications and messages
- o Send messages to individuals or distribution lists
- o Alerts for compliance reminders

- Testing Wizard - Testing and rating scale system:

- o Create, administer, and analyze rating scales



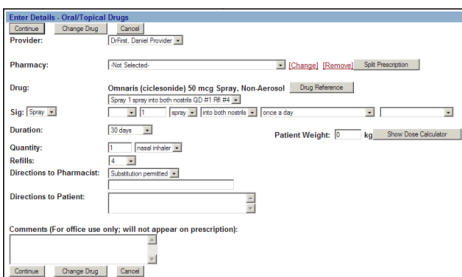
- ClinicTracker Mobile:

- o Enter and view ClinicTracker data using your mobile device (e.g., iPad)
- o Use built-in templates or let us create custom templates for you



- ePrescribing:

- o Drug-drug/drug-allergy interaction checking, dosage alerts, and other clinical decision tools
- o Pull real-time patient medication lists from three Pharmacy Benefit Management Systems (PBMs)
- o Display patient-specific formulary status at point of prescription
- o Includes mail-order connectivity to Caremark, ESI, and Medco
- o Print, email, or SMS a patient looking for a coupon, co-pay card, or prescription savings voucher
- o Allows Electronic Prescribing of Controlled Substances (EPCS)





- Automated Appointment Reminder Call Service

| Patient | Date | Start Time | End Time | Staff | Reminder Call Status | Timestamp |
|------------|-----------|------------|----------|--------------|----------------------|-------------------|
| John Zippy | 9/13/2012 | 8:30 AM | 10:00 AM | Groten, Jeff | Error No Answer | 09/13 at 11:06 AM |
| John Zippy | 9/13/2012 | 8:30 AM | 10:00 AM | Groten, Jeff | Confirmed By Patient | 09/13 at 5:18 PM |

- o Make appointment reminder calls to your patients. Because the system is fully integrated with the Scheduler, calls can be made automatically with no additional effort on the part of your staff
- o Ensure patients do not forget to attend their appointments - Patients can confirm, cancel, or reschedule their appointment through our integrated Patient Portal

SCHEDULED EVENTS

These are events that you are scheduled for in the next 60 days. If you have questions about any of these events, please [contact](#) your provider.

Confirmation recorded for 09/23/2012.

| Start Date / Time | End Date / Time | Staff | Location | Description | Reminder Status | Confirm | Cancel |
|--------------------|---------------------|--------------|-----------------------|---------------|-----------------|-------------------|--------|
| 09/21/2012 9:00 AM | 09/21/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Not Confirmed | Confirm | Cancel |
| 09/23/2012 9:00 AM | 09/23/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Confirmed | Confirm | Cancel |
| 09/25/2012 9:00 AM | 09/25/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Not Confirmed | Confirm | Cancel |
| 09/27/2012 9:00 AM | 09/27/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Not Confirmed | Confirm | Cancel |
| 09/29/2012 9:00 AM | 09/29/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Not Confirmed | Confirm in 1 day | Cancel |
| 10/01/2012 9:00 AM | 10/01/2012 10:00 AM | Groten, Jeff | Main Office, Room 202 | Group Therapy | Not Confirmed | Confirm in 8 days | Cancel |

- Insurance Eligibility Verification

- o Automate the process of authenticating insurance coverage and confirm the validity of a patient's insurance without having to make a phone call

| Plan Name | Effective Date | Expiration Date | Carrier | Plan Type | Network | Verification Status |
|-------------------|----------------|-----------------|-------------------|------------|--------------------|---------------------|
| BCBS Empire | 01/01/2012 | 12/31/2012 | BCBS Empire | Individual | Preferred Provider | Verified |
| Medicaid - Broome | 01/01/2012 | 12/31/2012 | Medicaid - Broome | Individual | Medicaid | Verified |

- Patient Portal:

- o Give clients online access to select information, including:

PATIENT PORTAL FOR EAST VIEW MEDICAL

Welcome John Zippy (Log Out)

Demographics Clinical Information Scheduled Events My Account Education Resources My Medical File

PAYMENT AGING STATUS

This is an analysis of the amount you owe broken down into categories based on the number of days past the appointment date.

| 0-30 days | 31-60 days | 61-90 days | 91-120 days | 121-210 days | Total |
|-----------|------------|------------|-------------|--------------|------------|
| \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$990.00 | \$1,040.00 |

OPEN BALANCE INFORMATION

This is a breakdown of the amount owed by you and any of your payers.

| Responsible Payer | Open Balance |
|-------------------|--------------|
| Patient | \$1,040.00 |
| Adna | \$1,323.00 |
| Athens | \$227.30 |
| BC BS Empire | \$1,552.37 |
| Medicaid - Broome | \$3,204.75 |

Contact Us
700.555.4115
East View Mental Health

Here you can provide more information about your agency or any disclaimers you may want to include

- Demographics
- Clinical information
- Account balances
- Scheduled events
- Education resources
- Medical file

- o Enable clients to:

- Pay bills online
- Confirm their appointments online with our reminder service

System personalization for your clinic:

Each ClinicTracker installation is tailored to your clinic's specifications to ensure a fast and successful implementation. While our support services are highly accessible, you will find that you can modify much of the system to your needs with built-in customization tools.

For more information contact us at 315.633.4240 or ClinicTracker@JAGProducts.com