



Product Brief

ClinicTracker: An Overview

Manage your practice with a robust and future-proof 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

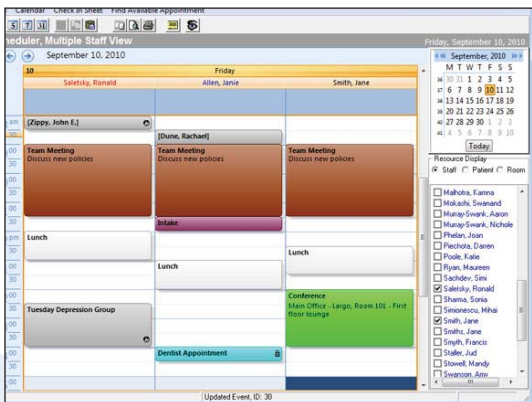
Implementation:



- 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

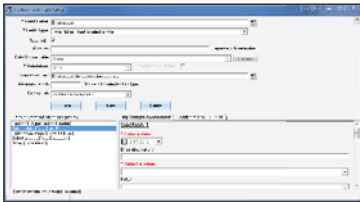




- Forms management: Pre-stored and custom forms as well as external documents

- o Pre-stored Forms:

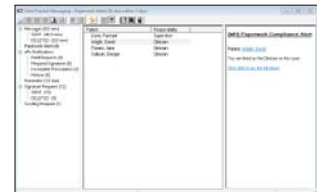
- Intake Assessment
- Admission Note
- Discharge Summary
- Treatment Plan
- Psychological Testing
- Progress Notes
- Lab Summary
- Case Review
- And many, many more...



- 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



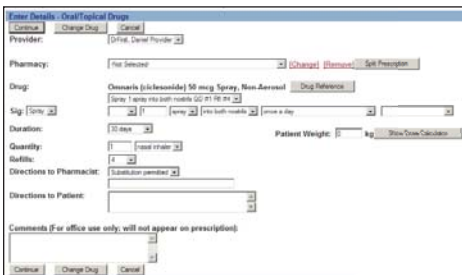
- ClinicTracker Mobile:

- 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 5:19 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 appointments - Patients can confirm, cancel, or reschedule their appointments through our integrated Patient Portal

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
09/20/2012 9:00 AM	09/20/2012 10:00 AM	Groten, Jeff	Main Office, Room 202	Group Therapy	Confirmed	Confirm	Cancel
09/20/2012 9:00 AM	09/20/2012 10:00 AM	Groten, Jeff	Main Office, Room 202	Group Therapy	Not Confirmed	Confirm	Cancel
09/17/2012 9:00 AM	09/17/2012 10:00 AM	Groten, Jeff	Main Office, Room 202	Group Therapy	Not Confirmed	Confirm	Cancel
09/16/2012 9:00 AM	09/16/2012 10:00 AM	Groten, Jeff	Main Office, Room 202	Group Therapy	Not Confirmed	Confirm	Cancel
09/16/2012 9:00 AM	09/16/2012 10:00 AM	Groten, Jeff	Main Office, Room 202	Group Therapy	Not Confirmed	Confirm	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

- Patient Portal:

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

Payment Aging Status	Total
< 30 days	\$0.00
31 - 60 days	\$0.00
61 - 90 days	\$0.00
91 - 120 days	\$0.00
> 120 days	\$0.00
Total	\$0.00

Open Balance Information	Open Balance
Patient	\$1,040.00
Athena	\$1,523.00
Athena	\$227.50
BC BS Empire	\$1,552.07
Amica - Income	\$3,284.75

- 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 hello@ClinicTracker.com