

# "I Didn't Go to Grad School to Chase Dollars & Cents!"

## Using Electronic Health Records & Web-Based Practice Management Systems to Thrive in a Third Party Payer World



Aaron Norton, LMHC, CAP, CRC, CFMHE  
www.integritycounseling.net

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# About the Presenter



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Aaron Norton is a Licensed Mental Health Counselor, Certified Addictions Professional, and Certified Forensic Mental Health Evaluator at Integrity Counseling, Inc., a group private practice in Pinellas County, FL. He is the President of the Suncoast Mental Health Counselors Association, Chair of the Education, Professional Standards, & Continuing Education Committee of the Florida Mental Health Counselors Association, and an Adjunct Professor at the University of South Florida's College of Behavioral & Community Sciences.





Psychotherapy in the U.S. is increasingly projected to shift towards third party payer systems, primarily private and public health insurance coverage.

<http://psycnet.apa.org/psycinfo/2012-24749-001/>

<http://khn.org/news/health-law-changes-therapy-business/>

<http://www.npr.org/sections/health-shots/2013/10/24/234737302/therapists-explore-dropping-solo-practices-to-join-groups>

<http://www.psychotherapynetworker.org/daily/daily/professional-development/psychotherapy-and-the-affordable-care-act/>

# Electronic Health Record

An electronic version of a patient's paper chart (healthit.gov)

## Web-Based Practice Management Software

A form of software used by medical offices that is designed to deal with day-to-day operations using internet-based software. (techopedia). May include:

- Scheduling system (including online scheduling)
- Payment/fee ledger
- Insurance EDI (electronic data exchange)
- Demographic data
- Electronic health record (treatment plans, progress notes, medication history, correspondence, etc.)
- Patient portal



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## Why Do It?



## Benefits

- Legible, complete documentation
- Increased paper compliance
- Easy sharing of records
- Remote access
- Competitive edge (online scheduling)
- Client convenience and loyalty (portal)
- Increased productivity
- Flexibility
- Improved organization
- Increased data retention
- Statistical analysis

## What Insurance Companies Require You To Have on Your Treatment Record

- Comprehensive Assessment
- Diagnostic Assessment
- Diagnostic Hypothesis
- Patient History - A collection of your client's background information
- Goals
- Treatment Plan
- Progress Notes
- Other information for compliance with insurance requirements
- Client Signature
- Provider Signature and Date



# Why Do It?



# Benefits

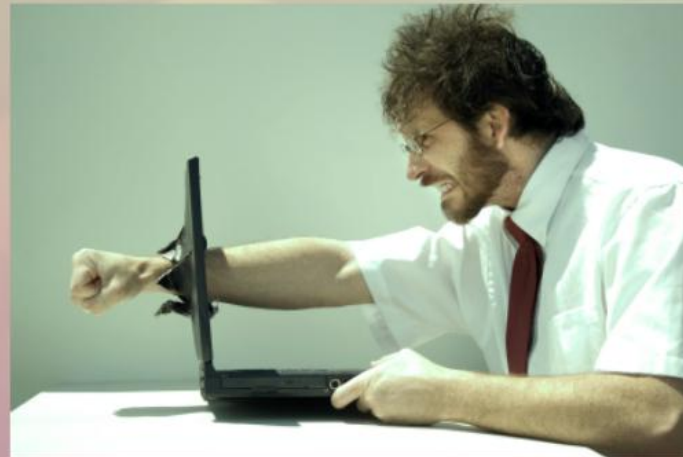
- Legible, complete documentation
- Third party payer compliance
- Easy sharing of records
- Remote access
- Competitive edge (online scheduling)
- Client convenience and control (portal)
- Reduced no-shows
- Reminders
- Improved organization
- Income loss reduction
- Statistical analysis



## What Insurance Companies Require You To Have in Your Treatment Record

- Confidentiality statement
- Personal/background information
- Allergies
- Special status situations
- Medication management
- Alcohol, tobacco, & substance Use/Abuse
- Mental status evaluation
- History
- Treatment plan
- Diagnosis
- Legible progress notes
- Author authentication and date/time of entries
- Missed appointments notes
- Discharge plan
- Continuity and coordination of care
- Coordinating care with PCP

# ...But Probably Not for Everyone



## Drawbacks of PMS & EHRs

- Cost
- Transition
- Requires some level of computer proficiency
- Prompts may be annoying
- For counselors who aren't already keeping good records, may be inconvenient or cumbersome
- Time investment
- The pain of change

## Are You Breaking the Law?

- HITECH Act
- ARRA (2009)
  - Strengthens HIPAA enforcement
  - Applies HIPAA to electronic health networks
  - "Business associates" must have signed agreements with therapists
  - Breach notification mandatory



<http://www.hhs.gov/ocr/office/privacy/2012/01/20120109.html>

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### HIPAA Privacy Rule

"Access control" limits the people and the systems that have access to your information. It includes:

- "Your policy" - your choice of how to use your information
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All users must be notified when they access your information, what changes have been made and why.

<http://www.apapracticecentral.org/advocacy/technology/hitech-act.aspx>

# HIPAA Privacy Rule

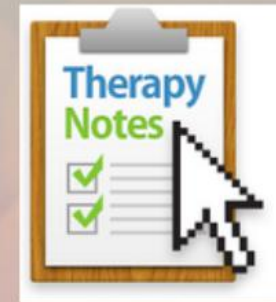
- “Access control” tools like passwords and PIN numbers, to help limit access to your information to authorized individuals.
- “Encrypting” your stored information. That means your health information cannot be read or understood except by those using a system that can “decrypt” it with a “key.”
- An “audit trail” feature, which records who accessed your information, what changes were made and when.

<http://www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/privacy-security-electronic-records.pdf>

# Web-Based PMS Options

Full Slate®

BestNotes



CounSol



TherapyNotes

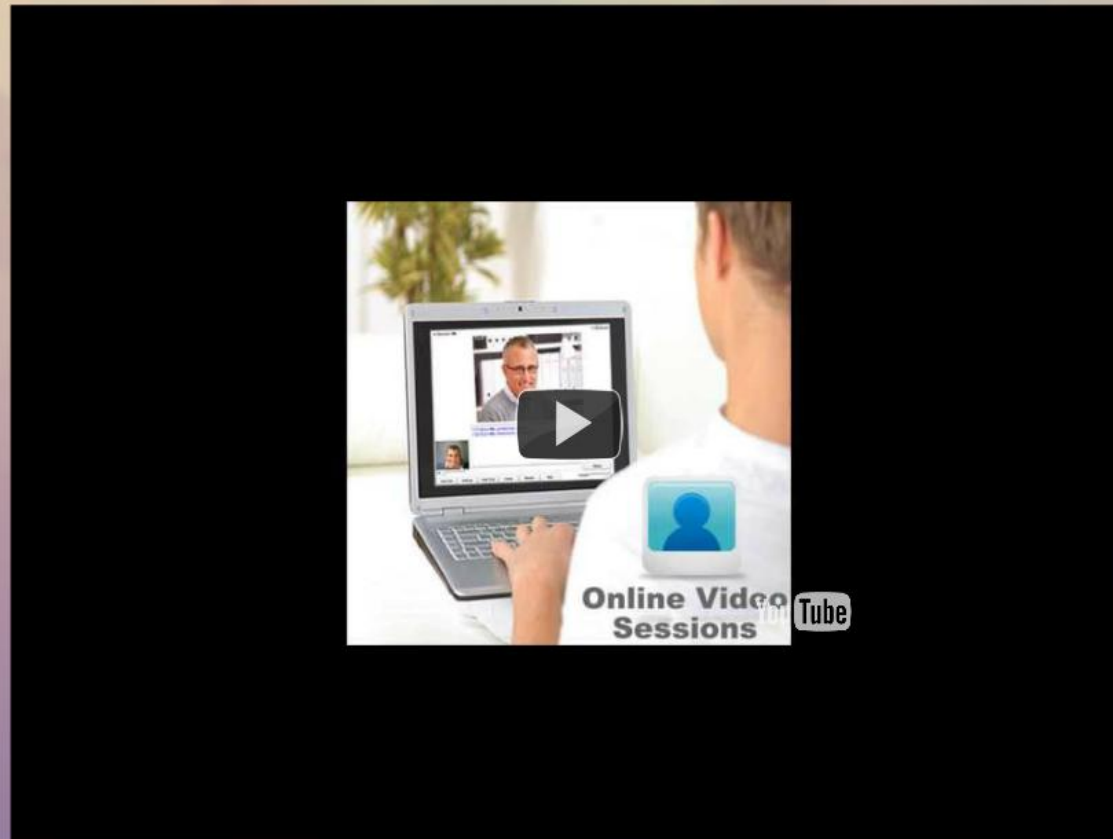


TheraScribe/  
therapyCharts





# CounSol

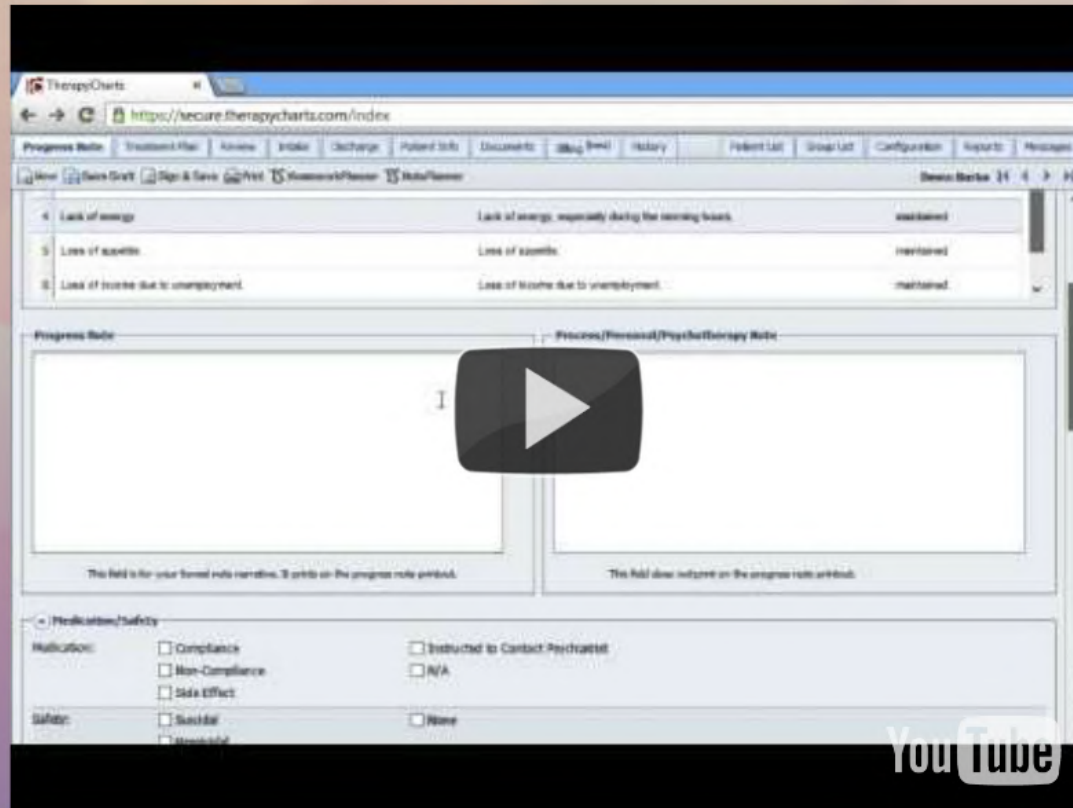


# TherapyNotes



The screenshot displays the 'TherapyNotes' software interface, specifically the 'Scheduling & Calendar' section. The page title is 'TherapyNotes' and the current view is 'Scheduling & Calendar'. Below the title, there are navigation tabs for 'Upcoming Agents', 'Appointment Calendar', 'Agents', and 'Appointments'. The main content area shows a list of therapy sessions for the date 'Monday, October 10, 2014'. Each session entry includes a time slot (e.g., 10:00 AM - 10:30 AM), a patient name, and a therapist name. For example, the first session is 'David Piner: Therapy Session with Kristina Averitt'. A large play button is overlaid on the center of the screenshot, indicating that this is a video recording of the software interface. The 'You Tube' logo is visible in the bottom right corner of the video frame.

# TheraScribe/ TherapyCharts





# CounSol vs. TherapyNotes

FEATURE	COUNSOL	THERAPYNOTES
HIPAA/HITECH COMPLIANT	Yes	Yes
SIGNED HIPAA BUSINESS ASSOCIATE AGREEMENT	Available within 2 weeks	Immediately downloadable
ENCRYPTED EMAIL	Yes	No
ACCOMMODATES GROUP PRACTICE	No	Yes
COST	\$59 for 1st counselor; \$54 for each counselor thereafter	\$59 for 1st counselor; \$30 for each counselor thereafter
CLIENT PORTAL	Yes	Yes (limited)
CLIENT ONLINE SCHEDULING	Yes	Yes

# CounSol vs. TherapyNotes

FEATURE	COUNSOL	THERAPYNOTES
ONLINE FORMS WITH DATA ENTRY FIELDS	Yes	No
ONLINE CLIENT PAYMENT	Yes	Yes
CLIENT INVOICING	Yes	Yes
ELECTRONIC INSURANCE CLAIMS SUBMISSION	No	Yes
CONTRACTED INSURANCE RATE ADJUSTMENTS	No	Yes
ACCOMMODATES MULTIPLE OFFICE LOCATIONS	Yes	Yes



# CounSol vs. TherapyNotes

FEATURE	COUNSOL	THERAPYNOTES
IPAD/TABLET/MOBILE DEVICE FRIENDLY	Yes (with minor glitches)	Yes
SYNCS WITH ICAL	Yes	Yes
TO-DO LISTS FOR CLINICIANS	?	Yes
PRE-POPULATED TX PLANS	Yes	Yes
PRE-POPULATED PROGRESS NOTES	Yes	Yes
BUILT-IN DSM-5 DIAGNOSES	Yes	Yes
BUILT-IN CPT CODES	Yes	Yes
ACCOMMODATES GROUP SESSIONS	Yes	Yes
CAN SCAN/DOWNLOAD PDF	Yes	Yes
CLIENT APPT. TEXT REMINDERS	Yes	Yes, but costs \$0.14 per text



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