

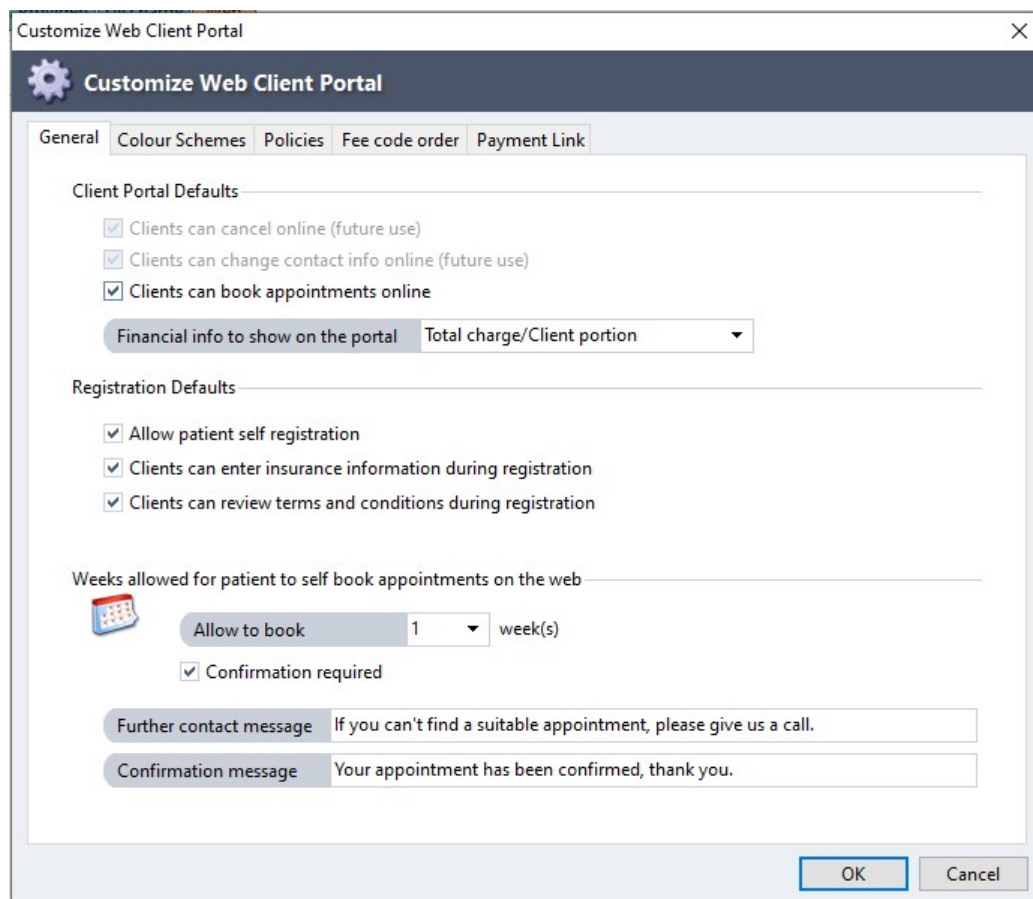
The Practice Perfect client portal can be used by your clients to register themselves, book appointments, view their financial transactions and balances and exchange documents with the clinic.

Because there are so many different variations permitted when allowing clients to perform these functions, there are many options that need to be set within Practice Perfect so that what 'faces the world' is the most effective for the clinic and its specific requirements.

Setup must be done in 4 basic places: *General*, *Providers*, *Fees* and then within each *Client*. There is also some setup required for the *Financial* portal component.

General Setup

The general setup can be found under *Settings, Customize Web Portal*. There are three tabs, starting with *General*.



The screenshot shows the 'Customize Web Client Portal' dialog box with the 'General' tab selected. The dialog has a title bar with a close button (X) and a gear icon. Below the title bar are five tabs: 'General', 'Colour Schemes', 'Policies', 'Fee code order', and 'Payment Link'. The 'General' tab is active and contains the following settings:

- Client Portal Defaults**
 - Clients can cancel online (future use)
 - Clients can change contact info online (future use)
 - Clients can book appointments online
 - Financial info to show on the portal: Total charge/Client portion (dropdown menu)
- Registration Defaults**
 - Allow patient self registration
 - Clients can enter insurance information during registration
 - Clients can review terms and conditions during registration
- Weeks allowed for patient to self book appointments on the web**
 - Allow to book: 1 week(s) (dropdown menu)
 - Confirmation required
 - Further contact message: If you can't find a suitable appointment, please give us a call.
 - Confirmation message: Your appointment has been confirmed, thank you.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

The first options are for future functions and cannot be set, at present.

Clients can cancel online. Ultimately this will give patients the ability to cancel their own appointments online, if the clinic permits this to happen, hence the option (future use).

Clients can change their contact info online. Ultimately this will give patients the ability to change their basic contact information online, again at the clinic's discretion (future use).

Clients can book appointments online. If you want to disable the entire patient self-booking feature of the client portal, please *un-tick* this option.

Allow patient self registration. This should be selected if the clinic wants to allow new patients to register and have their information automatically brought into Practice Perfect. If not selected, new patients cannot book appointments.

Registration Location. When a new patient registers, this is the default Incident *Service/Billing Location* into which they will be placed. The next round of changes will allow users to select which location when they register instead of being placed into a default. For now, users would need to be moved to an alternate location by the clinic staff once they have registered.

Clients can enter insurance information during registration. If enabled, newly-egistering clients will also be asked to supply their insurance information.

Clients can review terms and conditions during registration. If enabled, newly-egistering clients will be asked to review and agree to your clinic's Terms and Conditions.

Allow to book. How many weeks in the future are patients allowed to self-book appointments.

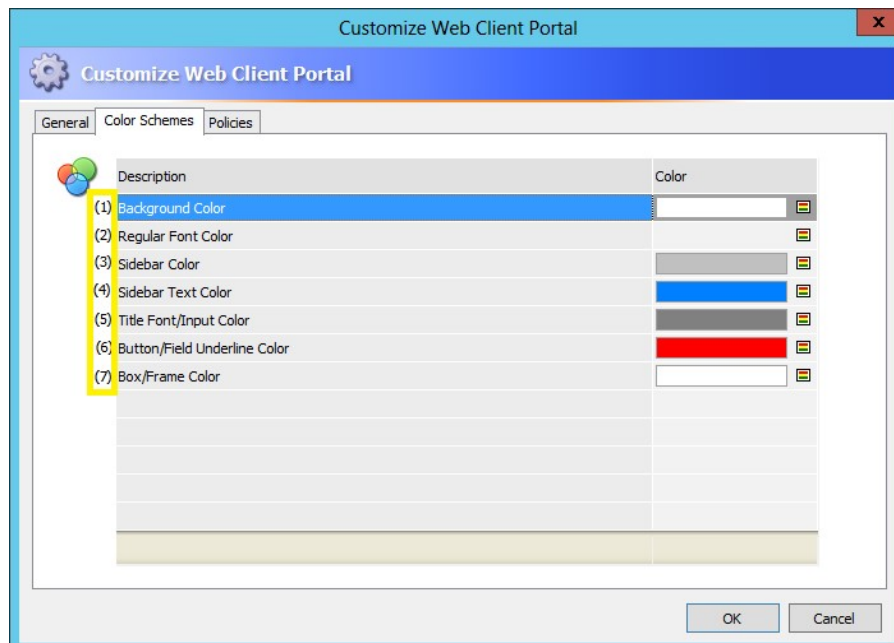
Confirmation required. If selected, the clinic will need to approve all appointments before they become official, otherwise they will remain with a status of pending and will be awaiting review.

Further contact message. This is the message that appears on the actual web booking screen intended to inform patients what do if they can't find an appointment that works (eg; "Can't find something you like? Please contact us at (555) 555-555. Thank you.)

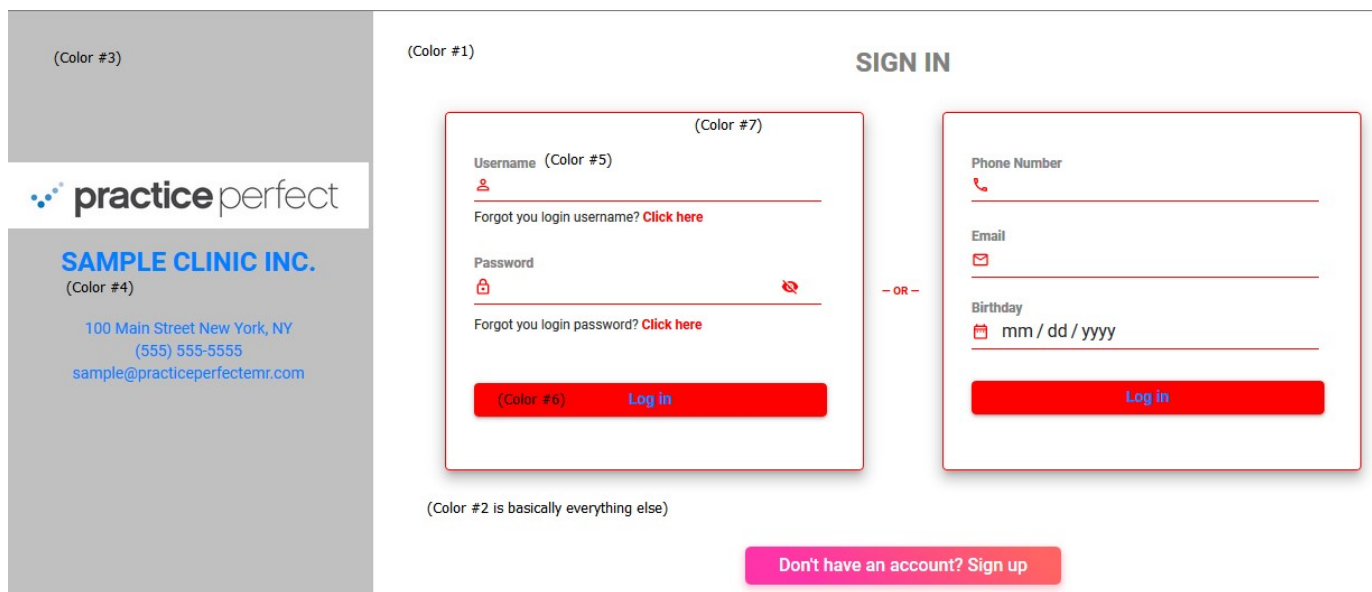
Confirmation message. This is the message that will appear on the actual web booking screen once a user has selected and verified their appointment request (Eg; "You are booked! We look forward to seeing you!")

Color Schemes tab:

The user can customize the appearance of their portal to match it at closely to their website as possible.

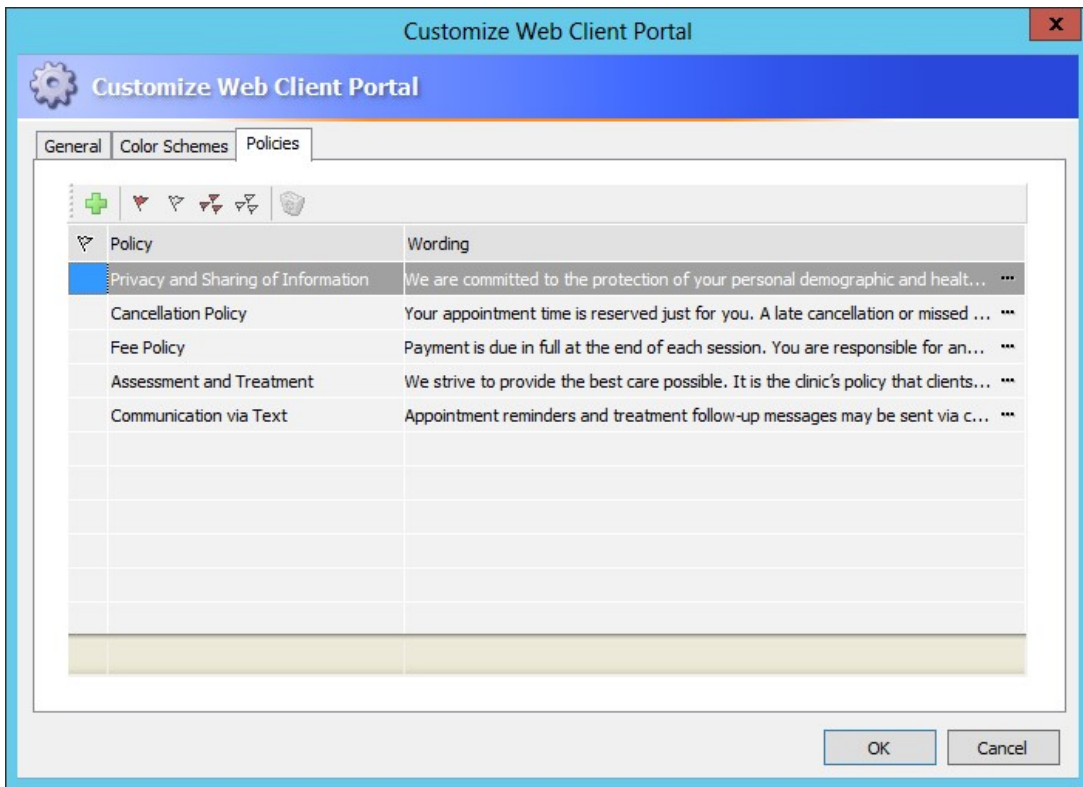


And they relate as follows:

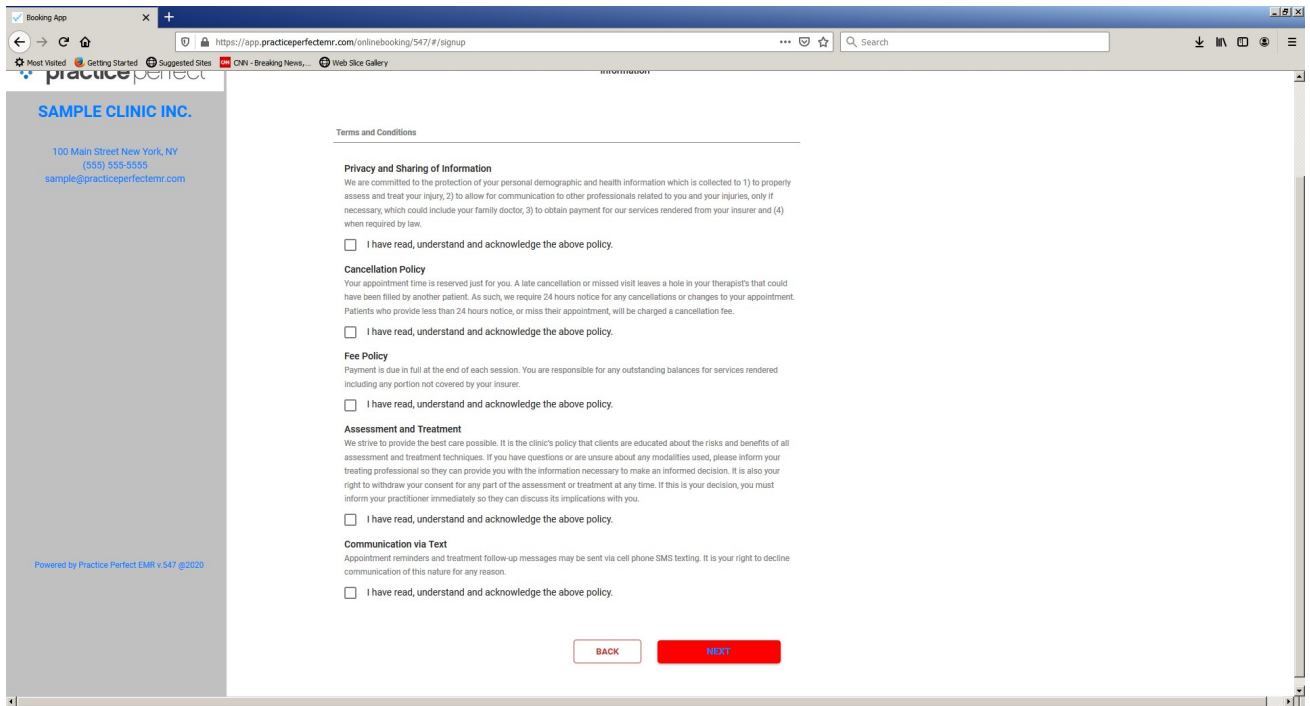


Policies tab:

This is where the clinic can setup their policies that appear in patient self-registration. A number of policies are installed by default that can be altered, added to, etc, as follows:



And these appear, as follows, in the portal as the last page of patient registration (assuming that the option to include terms and conditions during patient registration is enabled):



Provider Setup

There are three items to consider when setting up Providers: 1) When are they available for booking, 2) What services are they available to offer and 3) What will their profile look like to the client.

First, under *Housekeeping, Contacts, Providers*, there are two fields to consider:

The screenshot shows the 'Provider Setup' form for 'Ilvero, Herbert (Detail)'. The form is organized into several sections:

- Name:** Salutation (Mr.), First Name (Herbert), Last Name (Ilvero), Credentials (PT, MBA, DSc), **Job Title (President)**, Licensing Name.
- Address:** Street, City (Atlanta), State (GA), Zip Code, Country (United States).
- Phone Numbers:** Home Phone ((555) 555-5555), Work Phone, Other Phone ((404)).
- Email:** Home Email, Work Email.
- Billing:** NPI # (17200610), Secondary License #, Employee #, **Provider Type (Physical Therapy)**, Taxonomy Code, Modifier 1-4.
- Demographics:** Birthdate, SSN, Start Date.
- Location:** Default Location Code (11).
- Signature:** A field for the provider's signature.

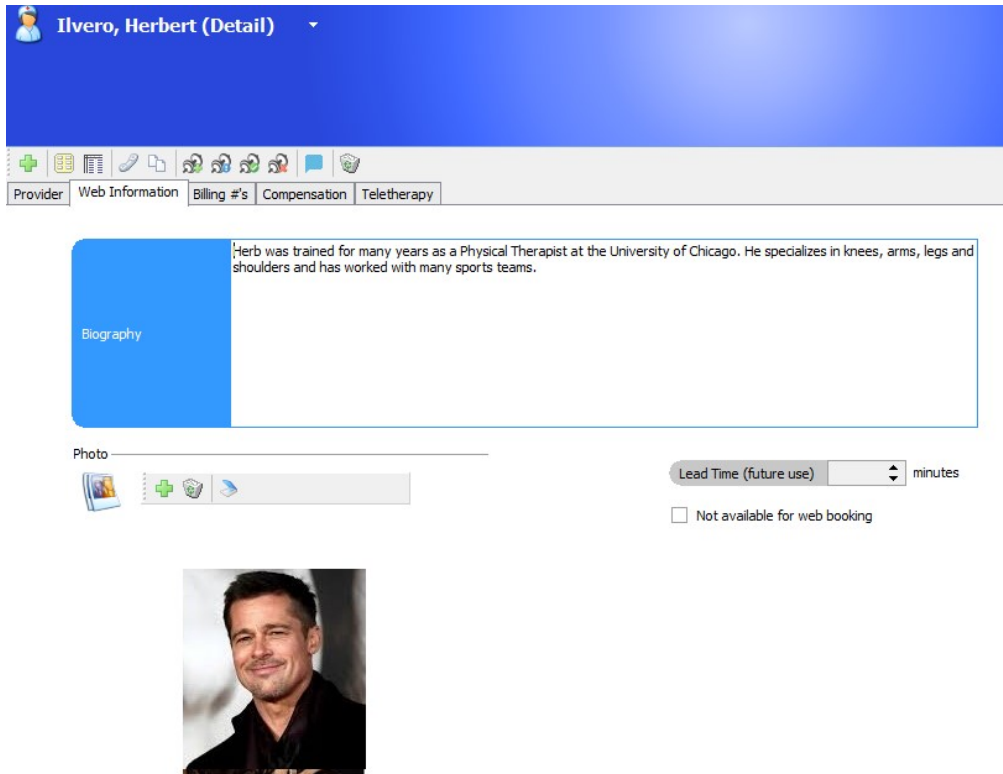
Two fields are highlighted with red boxes: 'Job Title' (President) and 'Provider Type' (Physical Therapy).

Job title. This will appear under the Provider's name on the web portal and should typically read "Physical Therapist", etc. (in red, in the sample below)

Provider Type. This is mandatory for web booking since it is how we ties Fees/Services to Providers. The Provider Type here must match the Provider Type in the Fees that this provider can perform, discussed further in this document.

Web Information tab:

This tab is where we define what ‘faces’ the patient on the website about this provider, as follows:



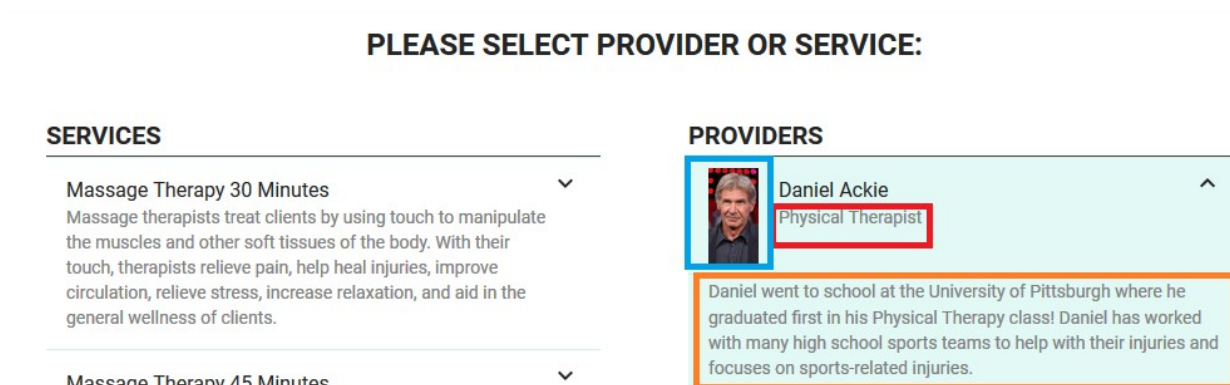
Biography. A brief description of the provider appears on the web portal (in orange, in the sample below).

Photo. A headshot of the Provider (in blue, in the same below).

Lead Time (future use). Not yet implemented, this will allow the user to define how far in advance an appointment can be booked to prevent last minute bookings.

Not available for web booking. If selected, the Provider will not appear at all on the web portal.

And this all appears, as follows:



Lastly, under *Housekeeping, Under Scheduled Providers*, you must indicate which days the provider is open for web-bookings, as follows, in the **red column**:

Therapist, Winny (Detail) ▾

General Special Shifts/Days off

Detail

Location Main Location

Provider Therapist, Winny

Minimum Appointment Duration 15 Minutes

Maximum Occupancy 3

Always available Temporarily Unavailable

Schedules

Week Day	Start Time	End Time	Web Booking
Sunday			<input type="checkbox"/>
Monday	10:00 AM	8:00 PM	<input type="checkbox"/>
Tuesday	10:00 AM	8:00 PM	<input type="checkbox"/>
Wednesday	10:00 AM	8:00 PM	<input type="checkbox"/>
Thursday	10:00 AM	8:00 PM	<input type="checkbox"/>
Friday	10:00 AM	8:00 PM	<input type="checkbox"/>
Saturday			<input type="checkbox"/>

Copy resource schedule to all other locations

Fee Setup

Since Fees & Services are now also client-facing, there is some setup involved here, in three areas:

First, since the entire booking system is now based upon the services selected, it's imperative that each Fee Code (that will be available for web booking), contains a *Default Duration*. Without this, the Fee will not appear on the list of available services to be booked.

WEB PT TREAT, Physical Therapy Treatment (Detail)

Fee | Payor Rates | Provider Types | Patient Self-Booking

Description

Used by Location: <All Locations>

Code: WEB PT TREAT

Product? Teletherapy?

Description: Physical Therapy Treatment

Can change description?

Ledger Account: TREAT

Fee Type: Treatment

Rate

\$80.00 Flat fee

\$80.0000 Per [] item(s)

\$80.00 Per [1] visit(s)

\$80.0000 Per [] minutes

\$80.0000 Per [] unit

Defaults

! Default Duration: 30

Default Visits: []

Default Quantity: []

Default Units: []

Time per Unit: 1

Productivity duration: []

Post treatment duration: []

Post treatment description: Post treatment

Charge Taxes

Office

Fee chargeable to client only Progress note required

Split info required Timed Fee Code

Second, in the *Provider Types* tab:

WEB PT TREAT, Physical Therapy Treatment (Detail)

Fee | Payor Rates | Provider Types | Patient Self-Booking

Provider Type

Physical Therapy


Make sure to list all *Provider Types* that this *Fee Code* can be booked/performed by. Remember, this is how we link Providers to Fee Codes. If we have a match, then that service will appear under the Provider's name on the client booking portal, as follows:

general wellness of clients.

Massage Therapy 60 Minutes ▼
 Massage therapists treat clients by using touch to manipulate the muscles and other soft tissues of the body. With their touch, therapists relieve pain, help heal injuries, improve circulation, relieve stress, increase relaxation, and aid in the general wellness of clients.

Physical Therapy Assessment ▼
 To goal is establish the individual's specific diagnosis, prognosis, and plan of care through the evaluation process, physical therapists synthesize the collected examination data and determine whether the potential or existing disorders to be managed are within the scope of physical therapist practice.

Physical Therapy Treatment ▼
 PTs work with individuals to prevent the loss of mobility before it occurs by developing fitness and wellness-oriented programs for healthier and more active lifestyles, providing services to individuals and populations to develop, maintain and restore maximum movement and functional ability throughout the lifespan.




Herbert Ilvero
President

Herb was trained for many years as a Physical Therapist at the University of Chicago. He specializes in knees, arms, legs and shoulders and has worked with many sports teams.

Physical Therapy Assessment
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Physical Therapy Treatment
 PTs work with individuals to prevent the loss of mobility before it occurs by developing fitness and wellness-oriented programs for healthier and more active lifestyles, providing services to individuals and populations to develop, maintain and restore maximum movement and functional ability throughout the lifespan.

Third, under the *Fees/Patient Self-Booking* tab, there are several pieces of information required, as follows:

 **TREAT, Physical Therapy Treatment (Detail)** ▼

+
📊
🛡️

Fee
Payor Rates
Provider Types
Patient Self-Booking

Client Service Description	Physical Therapy Treatment Session
Client Service Information	During a physical therapy treatment session, your therapist will review your progress and perhaps perform some manipulation and work with you on your exercises.
Web Options	Show and available to book ▼
Web Start Interval	0:00 and 0:30 ▼

Client Service Description. The title of the service to appear on the web portal (in red, in the sample below).

Client Setup

There are a few minor options that can be setup on a client-by-client basis along with a few other relevant fields.

The first, under the *Demographics* tab the client's web *User name* and *Password* will appear. While the user can set this up on their own during registration, it can be forcible altered here, as well.

Presement, Steve (Detail) ▾
Presement, Steve has a total of \$671.00 unbilled, **Balance due is \$671.00.**
Usual Fee Code: PRI ASSESS
7/8/2011, he is a great guy

Client Demographics Payment Info Guardian Contacts Incidents

Basic Information

File #	100355	Auto Generate
Gender	Male	
Birthdate	9/9/1964	
Marital Status		
SSN		
Preferred Language		
Race		
Allergies and Red Flags		

Photo

Employment/School Information

Employment Status	
Employer/School	
Job Title	
Occupation	
Supervisor	
Phone:	
Fax:	

Miscellaneous

County	
Driver License #	
License Status	

Web Booking

User name	stevep
Password	stevep

Presement, Steven (Detail) Blue Cross & Blue Shield of Ga will cover this client for \$2000.00 more.

Client Demographics Payment Info Guardian Contacts Incidents

Statistics Intake Tx Plan Billing Rules Policy/Claim Tasks Auth. Providers Discharge Web

Incidents

MVA WAD II w sprains

Incident Details

Previous Incident: [Dropdown]

Description: MVA WAD II w sprains

Web Description: April Car Accident

Primary Provider: Ilvero, Herbert

Cause of Injury: [Dropdown]

Place of Injury: [Dropdown]

Billing Details

Billing Provider: [Dropdown]

Usual Fee Code: PT TREAT

Usual Fee Price: [Dropdown]

Usual Duration: [Dropdown]

Collection Rep: [Dropdown]

Collection Status: [Dropdown]

Physician Details

Incident Physician: SMITH, B.A.

Phone: (555) 555-5555

Fax: (888) 888-8888

Credentials: [Dropdown]

Referral Details

Referral Source: Yellow Pages

Phone: (555) 555-5555

Fax: (888) 888-8888

Company: Yellow Pages

Referral Date: [Dropdown]

Administrative Details

Division: [Dropdown]

Appointment Color: [Dropdown]

Location Details

Billing Office: Main

Service Office: Main

Treatment Location: [Dropdown]

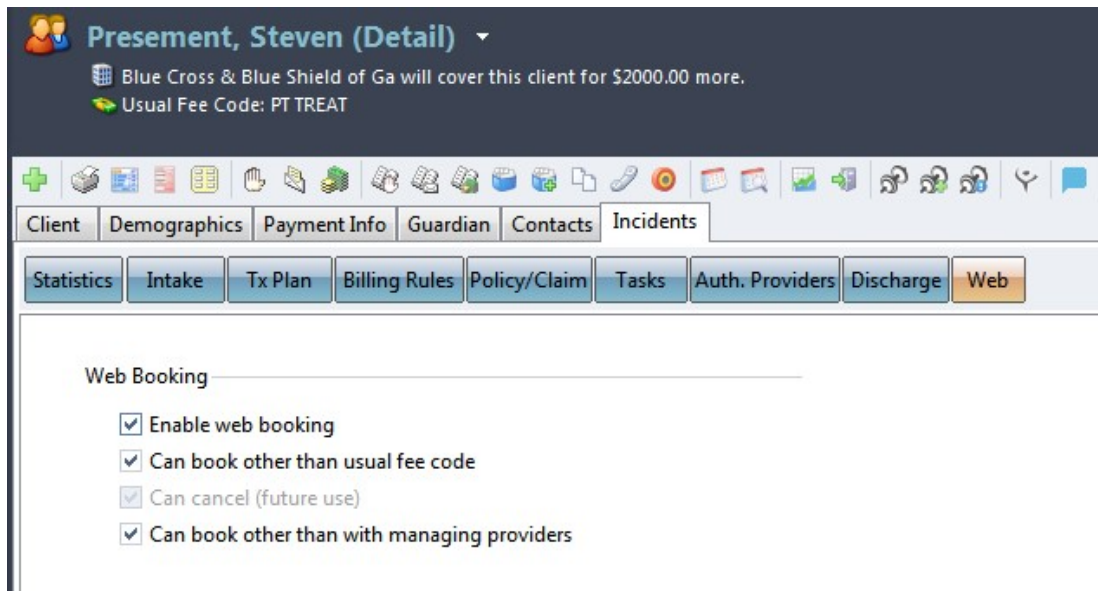
At home

Second, when a patient books an appointment, IF they have multiple active incidents, they will be asked which for which *Incident* they wish to book. The description of the incident that the patient will see comes from the *Web Description* field, which should contain the patient-facing description of the incident. If blank, the *Description* will appear instead.

Third, you CAN still setup a *Usual Fee Code* for a client and restrict whether or not they client can pick something other than their *Usual Fee Code* (discussed in the next set of options).

Please note: *The Usual Fee Code* needs to be setup properly in Fees (discussed above). If not, it cannot be booked.

Lastly, under *Incidents/Web*, there are a few client-specific options that can be set, as follows:



Enable web booking. Web booking can be disabled for this specific incident, if required, if a clinic does not wish the client being able to book appointments for this Incident. This field defaults to being 'ticked'.

Can book other than default fee codes. If selected, clients will be able to book appointments for any available Fee Code or service. If not selected, they will only be able to book for their *Usual Fee Code*. This field defaults to being 'ticked'.

Can cancel (future use). Not yet implemented, this option would either allow or disallow a client from being able to cancel their own appointments online.

Can book other than with managing providers. If selected, the patient will be able to book with any Provider (assuming that the provider offers the service they are requesting). If NOT selected, the patient will only see their Managing Provider's availability.

Processing Self-Entered Clients

When clients are self-entered, they appear in a special holding area, as follows:

The screenshot shows a software interface with a blue header bar containing a red-bordered dropdown menu labeled "Unapproved Clients". Below the header is a toolbar with various icons. A table below the toolbar displays client information. The table has columns for Name, Birthdate, Sex, Age, File #, Primary Provider, Home Phone, Division, and Incident. One row is populated with the following data:

Name	Birthdate	Sex	Age	File #	Primary Provider	Home Phone	Division	Incident
Thejimmy, Jimmy	1/1/1980	♂	40			(905) 888-7777		4/29/2020 left arm

Notice the new drop-down, we now have *All*, *Active*, *Discharged* and *Unapproved*.

The client will appear, as follows:

The screenshot shows a detailed client profile for "Thejimmy, Jimmy". The header includes a dropdown menu and a list of recent events: "4/29/2020, WEB Insurance Info: Allstate Insurance / ID: 26282828 / Claim #: 48484848 / Adjuster: Mr Bones", "4/29/2020, WEB Referral Info: newspaper", "4/29/2020, WEB Family Physician: Dr Jones, 666-777-8888", and "4/29/2020, WEB Guardian Info: Mommy, my mom, 555-555-5555". Below the header is a toolbar and a tabbed interface with tabs for Client, Demographics, Payment Info, Guardian, Contacts, and Incidents. The form is divided into several sections:

- Name:** Includes fields for Salutation, First Name (Jimmy), Middle Name, Last Name (Thejimmy), and a checkbox labeled "Patient self-entered. Approved?" which is highlighted with a red box.
- Address:** Includes fields for Street (100 Main Street), City (New York), State (NY), Zip Code, and Country (United States).
- Phone Numbers:** Includes fields for Home Phone ((905) 888-7777), Work Phone, Other Phone, Fax, Auto Call Phone #, and Auto Text Phone #.
- Family Doctor:** Includes a dropdown for Family Physician and fields for Phone, Fax, and Credentials.
- Email:** Includes fields for Home Email (jimmy@jimmy.com) and Work Email, both with "Contact?" checkboxes, and a text area for Contact comments.
- Emergency Contact:** Includes fields for First Name (Mommy), Last Name (Thejimmy), Relationship, and Phone ((561) 555-9999), with a "Spouse?" checkbox.

To move the client from *Unapproved* into the *Active Client* listing, tick the *Patient self-entered. Approved?* box. The client will be moved into the *Active* area and this field will completely disappear.

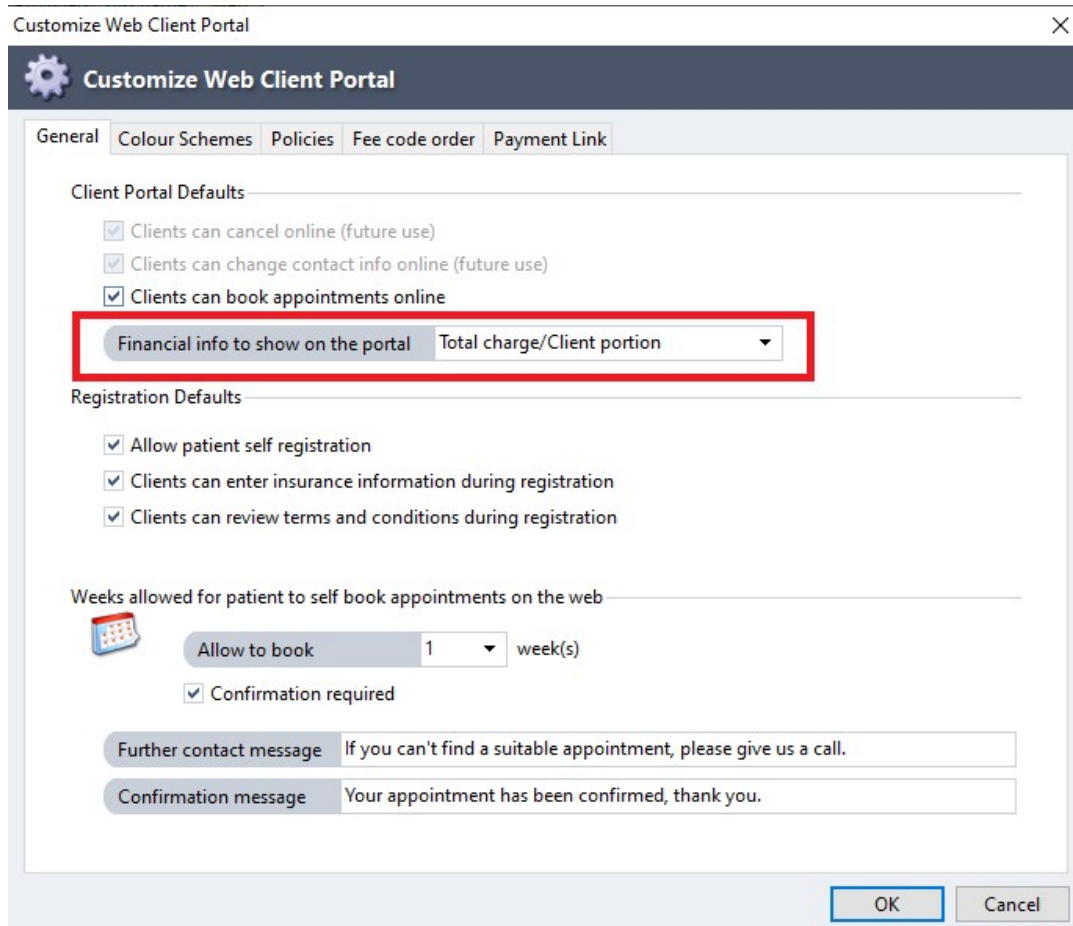
Notice the section in yellow with the word *WEB* prior to each line...

The clinic would need to look at this information and then enter it manually into the appropriate places such as *Billing Rules, Referral Source, Physician and Guardian*. Why? Because we don't have any way to know if this is the same Physician, Payor, etc, on file. It could be a payor with a different address, a Physician with a similar or wrongly-spelled last name, there is no reliable way to match these up unless we provide a drop-down list to the registering patients which would probably represent a privacy breach.

Financial Portal setup

There are two sets of options available for the Financial side of the client portal.

The first has to do with exactly what financial information the client can see, if anything. This is found under *Settings, Customize Web Portal* in the *General* tab, as follows:



The screenshot shows the 'Customize Web Client Portal' dialog box with the 'General' tab selected. The 'Client Portal Defaults' section contains three checked checkboxes: 'Clients can cancel online (future use)', 'Clients can change contact info online (future use)', and 'Clients can book appointments online'. Below these is a dropdown menu labeled 'Financial info to show on the portal' with 'Total charge/Client portion' selected. The 'Registration Defaults' section has three checked checkboxes: 'Allow patient self registration', 'Clients can enter insurance information during registration', and 'Clients can review terms and conditions during registration'. The 'Weeks allowed for patient to self book appointments on the web' section has a calendar icon, a dropdown set to '1' week(s), and a checked 'Confirmation required' checkbox. At the bottom, there are two text input fields: 'Further contact message' with the text 'If you can't find a suitable appointment, please give us a call.' and 'Confirmation message' with the text 'Your appointment has been confirmed, thank you.' The 'OK' and 'Cancel' buttons are at the bottom right.

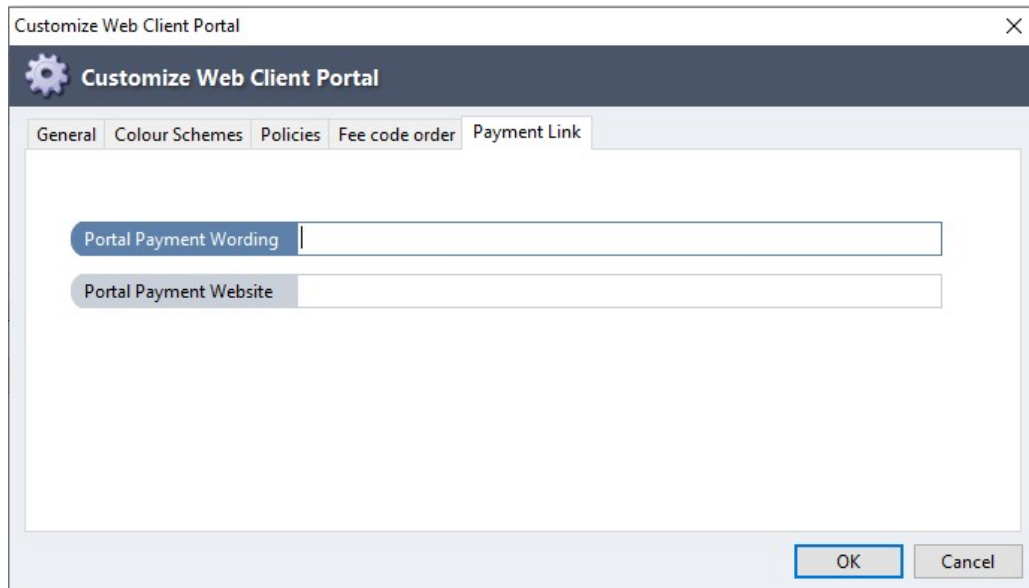
In the **Financial info to show on the portal** field, there are three options, as follows:

None. If selected, the clients will not be able to access ANY financial information on the portal.

Total charge/Client portion. If selected, both the *Payor and Client-sides* of the charges will be displayed.

Client portion only. If selected, only information related to the clients' portion of any charge will be displayed.

The second option set has to do with the verbiage surround client online payments. The options for this are found under *Settings, Customize Web Portal* in the *Payment link* tab, as follows:



There are two fields here, as follows:

Portal Payment Wording. This is the phrasing that will appear *under* the client’s balance on the portal. Typically, this could say “Please call the clinic to pay your balance at (555) 555-5555” or “Please click on the link below to payor your balance”, etc.

Portal Payment Website. If you *do* have a payment portal, the portal website would be entered here and this will appear as a *clickable-link* on the client portal under the *Portal Payment Wording* field outlined above.