

## Functional Capabilities Checklist

### What You Want in a Software System

#### FINANCIAL ACCOUNTING

- Billing for HCFA, UB92, Patient Invoicing
- Billing Wizard that walks you through the billing process
- Accounts Receivable
- Accounts Payable
- General Ledger
- Credit Card Processing
- Full Financial Reporting

#### AUTHORIZATION OF CARE

- Outpatient session authorization & tickler
- OTR Helper
- Inpatient treatment authorization & tickler
- Concurrent review notes

#### CLINICAL ASSESSMENT AND OUTCOMES

- Biopsychosocial Assessment & Narrative Report
- Mental Status Exam
- Biometric Testing Results
- Drug Testing Results
- Substance Abuse History
- Borderline Personality Disorder Assessment
- Psychotraumatic Exposure Scale
- Target Behavior Tracking System for progress measurement
- Psychometric Testing Results (IQ, MMPI, Becks, MCMI-II etc.)

## **CLINICAL TREATMENT & RECORD KEEPING**

- Patient Register and Information Profile
- Patient photographs
- Patient Contacts (Emergency and Others)
- Current Diagnosis and Diagnostic History
- Treatment Plan
- Progress Notes
- Intake Summary
- Discharge Summary
- Progress Summary
- Treatment Effectiveness Graphical Analysis
- Auto-generated Progress Notes
- Medication Tracking
- Medication Prescription Writer
- Episode of Care Program History
- Admission, Discharge and Transfer
- Bed Chart
- Critical Lab Work Results
- Clinical Orders
- Behavior Modification Program Design

## **ASSESSMENT DESIGNER-Create your own assessments**

- Create assessments using Yes/No, True/False, Multipoint scales, or text response scales.
- Set up scoring systems for your assessments.
- Update them as needed.

## **REFERAL & MARKETING**

- Referral clinical and demographic information
- Referral source information including number of referrals and admissions for each source
- Marketing statistics

## **STAFFING**

- Demographics
- Credentials including professional licenses
- Employment Information & Salary
- Malpractice insurance information
- Managed Care Panel Memberships
- Continuing Education History
- Task Lists

## **SCHEDULING**

- Outpatient scheduling integrated with billing
- Staff non-patient scheduling
- Group & class scheduling
- Treatment group schedule linked to treatment plan
- Transportation scheduling

## **SECURITY**

- Security groups
- Individual staff level security
- Button and field level security
- Meets all HIPAA standards for controlling access to protected health information

## **ADMINISTRATIVE LIBRARY**

- Treatment problems, strengths, goals, and objectives
- Facilities, vehicles and equipment
- Organization chart
- Medications library
- Services library
- Funding source library
- Clinical order library
- Contacts listings

## REPORTING-a few of the reports your may need

- Patient Treatment Plan
- Progress Notes by treatment objective
- Single progress notes
- All progress notes
- Patient current medication
- Patient medication history
- Patient clinical orders
- Patient target behavior change over time
- Intake Summary
- Discharge Summary
- Mental Status Summary
- Biopsychosocial Narrative
- A/R Aging by patient or funding source
- Income Statement
- Monthly Management Revenue/Expense
- Patient receipts
- Patient invoice
- Budget versus actual
- Chart of accounts
- Trial balances
- Patient day sheet
- Co-payments due
- Referrals by month and source
- Total referrals year to date by source
- Admissions, discharges, and transfers
- Patient Census
- Bed Chart
- Provider's patient schedule
- Individual patient schedule