



# TheraManager Help Note

## Subject: Encounter Form - Paper

This Help Note describes how to create a paper encounter form\*, and to print this form from the Appointment grid. You can print the encounter form for a single patient, or print all encounter forms for a clinician for the day. The encounter form will print for booked appointments only – not for posted appointments, nor for appointments marked as attended.

The letterhead for the encounter form is formatted as follows:

Tel NXX-NXX-XXXX	[Clinician Professional Name]	NPI# XXXXXXXXXXXX
Fax NXX-NXX-XXXX	[Official Business/Corporate Name]	License # XXXXXX
Email <a href="mailto:xxxx@xxxx.com">xxxx@xxxx.com</a>	[Corporate Address]	[TIN]
URL <a href="http://www.xxxxxxx.dom">www.xxxxxxx.dom</a>	[Corporate Address]	
[Patient Name] visited on [Date and time of appointment]		
Address:		CPT Code: XXXXX
Home Phone: NXX-NXX-XXXX	Work Phone: NXX-NXX-XXXX	Mobile: NXX-NXX-XXXX
DOB:	Age:	Sex:
Ins1:	Ins2:	Marital Status:
Note:		Chart: [Chart ID]

See Note 1 for a guide to the source of each field in the letterhead. Below this letterhead, you can create an encounter form listing available procedures and fees associated with the selected clinician.

## Instructions

1. Make sure TheraManager is closed.
2. Create the encounter form using a word-processing application like MS Word. A typical encounter form might look like this (following page):

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\*Sometimes referred to as a “superbill.” However, confusion can arise since “superbill” often is also used to refer to as a “statement of service (SoS).” The key to distinguishing between superbills as encounter forms versus SoS’s lies in the purpose of each statement and its intended audience:

- Encounter forms can be generated either by the clinician or administrative staff and intended to communicate billing data.
- On the other hand, SoS’s are generated by the practice (via TheraManager, of course!) and are intended for an insurer for the purpose of reimbursing the patient.

In principle, you may be able to use an encounter form in lieu of an SoS, but you are strongly discouraged from doing so since TheraManager does not record the print date of an encounter form.

Refer to **PRINTING STATEMENTS – Overview.pdf** for an expanded discussion of SoS within the context of statements generated by TheraManager.



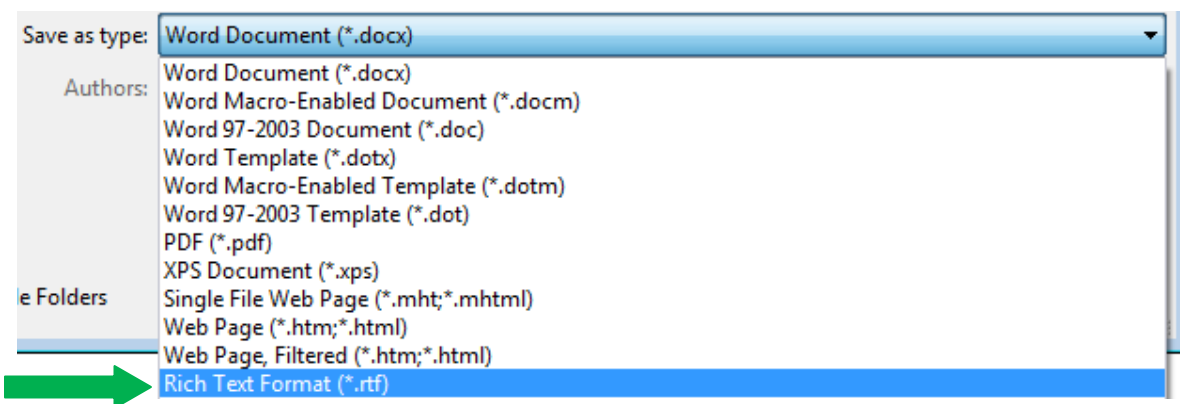
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OFFICE VISIT-NEW PATIENT			PROCEDURES			PROCEDURES		
FEE	DESCRIPTION	CODE	FEE	DESCRIPTION	CODE	FEE	DESCRIPTION	CODE
	N/P FOCUSED HX, EX 10	99201		THERMAGE	99907		I&D ABCESS, CYST SIMP	10060
	N/P FOCUSED HX, EX 20	99202		THERMAPEEL	99908		I&D CYSTMULTI/COMPLEX	10061
	N/P FOCUSED HX, EX 30	99203		MICROLASER PEEL	99909		I&D ABCESS	20005
	N/P FOCUSED HX, EX 45	99204		BBL	99910		I&D POST OP INFECTION	16180
<b>OFFICE VISIT- ESTABLISHED PATIENT</b>				LASER RESURFACING	99911		I&D HEMATOMA	10140
	E/P MINIMAL EXAM 5	99211		SUBCISION ACNE SCARS	10010			
	E/P FOCUSED HX, EX 10	99212					DEBRIDE SKIN FULL	11041
	E/P EXPANDED HX, EX15	99213		MILIA EXTRACTION > 15 LESIONS	17110 17111		DEBRIDE SKIN & SUBQ	11042
	E/P DETAILED HX, EX 25	99314						

- Make sure that the first line in the form (in the above example, OFFICE VISIT-NEW PATIENT) is at least 2.25" from the top of the page (Note 2).
- Save the file as

.\TheraManager\Forms and Files\<<filename>.rtf (Note 3)

Within the Save As box, you must save the encounter form as a "rich text format" file:



within the Forms and Files folder (not Forms & Files).

- Close the \*.rtf file containing the encounter form (Note 4).



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6. [AS APPLICABLE, CLIENT/SERVER ONLY] Copy the \*.rtf file comprising your encounter form to each other computer (Note 5).
7. Go to the **Customization | Clinician Information** screen.
8. Select the desired clinician from the **Clinician** titlebox.

Name of Encounter Form File include '.rtf' suffix

9. In , enter the name of the encounter form file, including the .rtf suffix, in the appropriately labeled field. The maximum filename length is 16 characters (not including the .rtf suffix).

10. Go to the **Appointments** screen.

11. To print the encounter form in the **All**, **Day** or **Week** views:

- All booked appointments for the day: Click anywhere in the Appointment grid, then right-click **Encounter Form > Print All**.
- Single booked appointment: Select the session – the lettering and border become **bold** – then right-click **Encounter Form > Print Selected**.

OR

To print the encounter form in the **Appt List** view:

- Select the session – **the session turns blue** – then right-click **Encounter Form for Selected Appointment**

Repeat step 10 as desired for each appointment.

## Notes

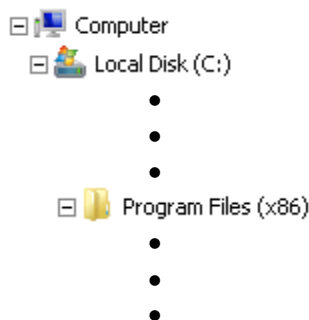
1. The guide to the Encounter Form letterhead is as follows:



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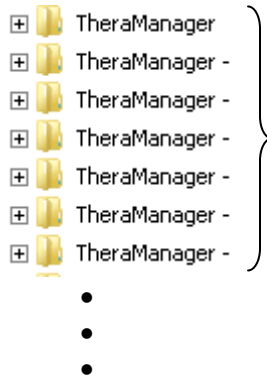
Field	Source Screen
Official Business/Corporate Name	<b>Administrator   Corporation/s</b>
Corporate Address	
Tel	
Fax	
Email	
TIN	
Clinician Professional Name	<b>Administrator   Clinician/s</b>
NPI	<b>Customization   Clinician Information</b> (NPI # and State 1 License fields, respectively)
License #	
Date and time of appointment	<b>Appointments</b> (Book Appointment form)
CPT Code	
Note	
Patient name	<b>Patients   Patient Data</b>
Address	
Home/Work/Mobile Phone	
SSN	
DOB	
Age	
Sex	
Marital Status	
Chart ID	
Ins1	<b>Insurance   Primary</b>
Ins2	<b>Insurance   Secondary</b>

- In \*.rtf files, you cannot edit the Header to adjust the header length. You must create the 2.25" white space at the top of the page by pressing the **Enter** key on your keyboard to create the empty lines. (Very low-tech technique.)
- If your Main Data is in the TheraManager cloud, make sure that you upload the \*.rtf file to the correct .\TheraManager folder in the cloud server:





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4. If you are using the same encounter form for multiple clinicians, you will need to:
  - Select each clinician in turn at the **Customization | Codes etc** screen
  - Enter the name of the encounter form file in the designated field
  - Repeat steps 4 and 5 above
5. If when you attempt to print an encounter form you see the dialog of the form



either you have:

- Not closed the source encounter form file ⇒ Close it, then try again
- Not saved the file as an \*.rtf file ⇒ Re-save the file per step 4 above, then close the file

Name of Encounter Form File include '.rtf' suffix

- Entered the wrong filename in  ⇒  
Correct the entry in this field per step 9

6. Instead of copying each encounter form to other computers, you may want to place the \*.rtf file on a shared drive, create a shortcut, then copy the shortcut to each client TheraManager folder. See **Sharing Access to an EMR Template or Form.pdf** as an example.



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7. See **Booking or Posting an Appointment Involving Multiple CPTs.pdf** for a description of the popup encounter form on the **Appointments** screen.