

Tap Into CentralReach

CentralReach

2017 User Conference

The Chronicle Newsletter

Weekly e-mail to all current and active users

What's coming "Live" in the next week

What's become "Live" in the last week

Company news

New feature updates and information

The Chronicle

**DOCUME
MANAGE
EXPRESS**

SIMPLIFYING INSURANCE CR
EVERYDAY HR DOCUMENTATIO

ideas.centralreach.com

487

TOTAL IDEAS

2,903

TOTAL VOTES CAST

111

**TOTAL IDEAS
DEVELOPED**

The ReachOut Initiative

Employment for adults with disabilities

Working directly with their job coach

Hire at least one more adult with a disability
before the end of the first quarter 2017

centralreach.com/insights



Tonight's Agenda

Practice Management

Chris Plante

Learn: Data Collection

Greg Paquette

Premium Features and Product Roadmap

Brian Curley



Best practices & workflow recommendations

What's coming soon

Extended Pipeline

Practice Management

Central**Reach**

2017 User Conference

Contact Forms

Automation!

Make specific information required

Gather documentation during intake

LA Region - New Client

(Fields marked with * are required.)

First Name

Last Name

Home Phone

Address - line 1

Address - line 2

State

Select...

City

Zip / Postal Code

Cell Phone

CONTACT FORMS

Important Client Uses

Automate connections

Embed directly into your website

Start the intake process

Connect To
Choose contacts individually or by label to connect with the newly created client, along with their permission to the client account (view, edit), to that client's schedule, and the client's access to the contact's schedule:

Contact/Label	Permission	Files	Learn
Admin (5 contacts)	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Beth Spikes (ID: 65469)	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduling (4 contacts)	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Labels
Automatically apply the following labels to the newly created person's account. These are from the organization's library with Multi-Use licenses.

Active Verification Needed

Learning Trees
Choose learning trees to add to the newly created person's account. These are from the organization's library with Multi-Use licenses.

(Client Name) Program Book

Notify Contacts
Automatically notify the following contacts of the newly created person's account. IMPORTANT! Users who are automatically connect to any new contact must also be added to list of employees.

Steve Berman (ID: 69608)

Request Files To Be Uploaded
Allow the user to upload files with their form submission. These files can optionally also be added to the client's schedule.

Required	Name/Description	Labels
<input checked="" type="checkbox"/>	Insurance Card	Add file label

CONTACT FORMS

Important Employee Uses

Automate scheduling permissions

Auto-assign internal Learning Trees

Send a custom welcome email

DETAILS **AUTOMATION & FILES** **FIELDS**

Connect To
Choose contacts individually or by label to connect with the newly created employee, along with the employee's access to the contact's schedule (view only or edit), to that employee's schedule, and the employee's access to the contact's schedule:

Contact/label	Permission	Access to Employee's Schedule
Scheduling (4 contacts)	View	Manage
Admin (5 contacts)	Edit	Manage
Active Location 1 (6 contacts)		View

Learning Trees
Choose learning trees to add to the new employee's library with Multi-Use licenses.

- Rockstar Policy and Procedure Manual

Automatically notify the following contacts
created via this form. IMPORTANT! Users listed here must be notified via email and dashboard when a new contact is created via this form. IMPORTANT! Users listed here must be notified via email and dashboard when a new contact is created via this form. IMPORTANT! Users listed here must be notified via email and dashboard when a new contact is created via this form.

- Beth Spikes (ID: 65469)

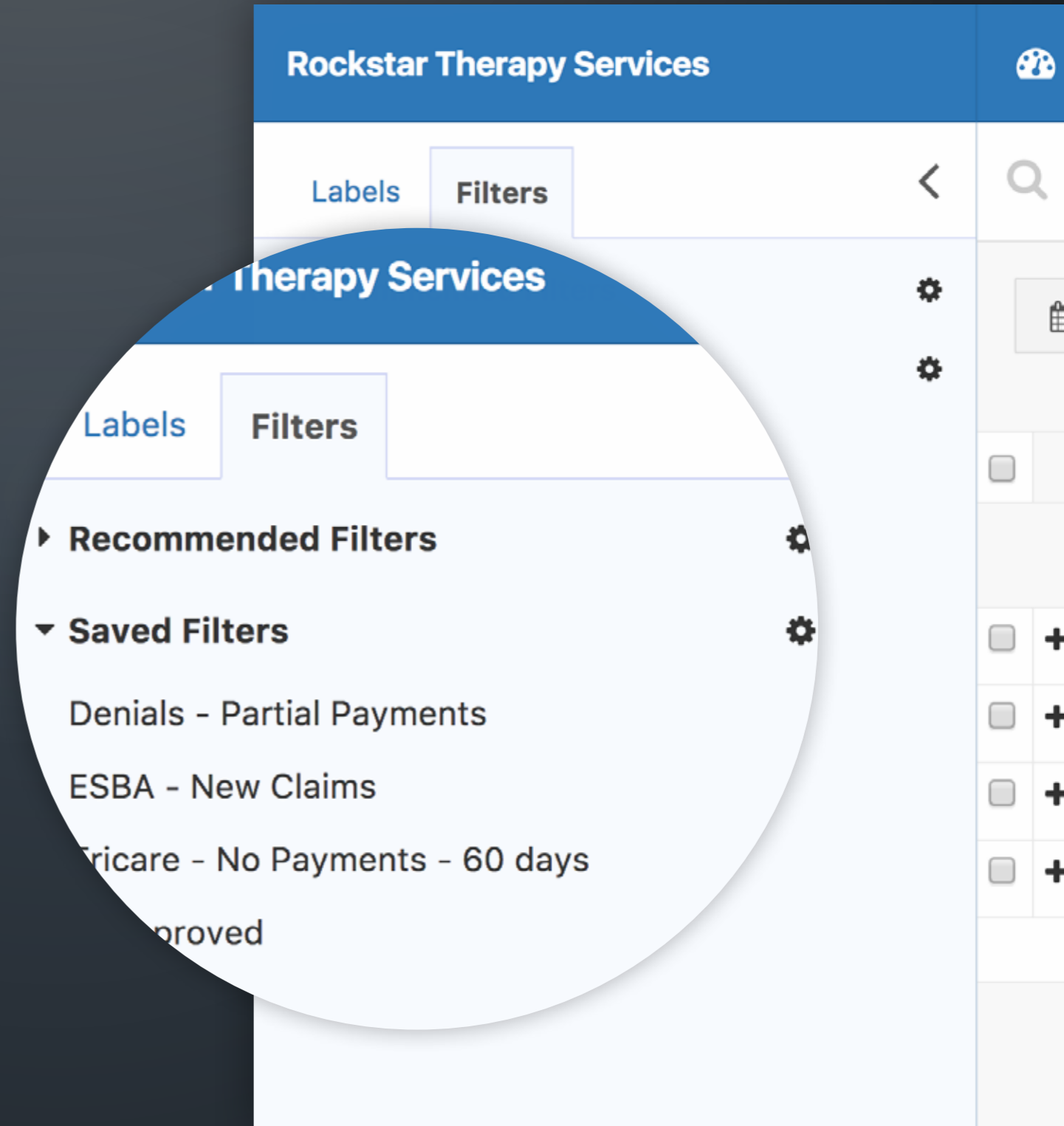
Saved Filters

Versatile

Catch errors early

Direct staff

Maximize efficiency



SAVED FILTERS

Contacts: Audit Contacts & Reduce Errors

The screenshot displays a contact management interface. On the left, there is a sidebar with navigation options: Labels, Filters, Recommended Filters, Saved Filters, Contact Intake Details, Address & Location, Radius Search, Profile/Setup, Extended Profile, and Billing Payors. The main area shows a search bar with 'Search 6 contacts...' and a filter bar with 'Filter: Clients', 'Diagnosis Code(s): Not On file', and 'Con'. Below the filter bar is a table of contacts:

Type	Id	Name
<input type="checkbox"/>	144819	Mark Smith
<input type="checkbox"/>	99162	Natalie Portman
<input type="checkbox"/>	127479	Roger Rabbit
<input type="checkbox"/>	71197	Sammy Smith
<input type="checkbox"/>	168519	Sample Client
<input type="checkbox"/>	375335	Testing Isdkjf

On the right, a dialog box titled 'Save Current Search Values' is open. It contains the following fields and options:

- Save current search values to filter:
-
- Name:
- Allow others in your organization to subscribe to
-

SAVED FILTERS

Authorization: Identify Opportunities

The screenshot displays a software interface for "Rockstar Therapy Services" with a search bar and various filter options. A circular callout on the left highlights the "Saved Filters" menu, which includes "Expired Auths", "Under 60% - 40+ hours", and "Under 80% - 20+ hours". A mouse cursor is pointing at the "Under 80% - 20+ hours" filter, with a tooltip that reads "Filter by: Under 80% -". Another circular callout on the right highlights a table with columns for "Pending", "Remaining", and "Utilization". The table shows a row with values 25.50, 20.00, and 60.00% respectively. The "Utilization" column is highlighted in yellow. The table also shows a "50 per page" option and a download icon.

Pending	Remaining	Utilization
25.50	20.00	60.00%

SAVED FILTERS

Billing: Outstanding Items with Parameters

The screenshot displays a software interface for managing billing entries. At the top, there are navigation icons for home, users, messages, and a currency symbol. Below this is a search bar labeled 'Search billing entries'. A date range filter is set to 'Aug 1, 2016 - Feb 8, 2017'. Several filter tags are applied: 'Insurance: Tricare', 'Billing Status: Outstanding', 'standing', and 'Last Paid: before Dec 11, 2016'. A sidebar on the left lists 'Recommended Filters' and 'Saved Filters'. The 'Saved Filters' list includes 'Denials - Partial Payments', 'ESBA - New Claims', 'Tricare - No Payments - 60 days', and 'Unapproved'. A tooltip for the 'Tricare - No Payments - 60 days' filter shows 'Filter by: Tricare - No Pay...'. The main area contains a table of billing entries with columns for Date, Time, Client, and Payor. The table shows several entries for M. Edwards and B. O'Dell, all with a status of 'Outstanding' and a date of 2/7/17 or 2/6/17.

Date	Time	Client	Payor
2/7/17	9:30-11a	M. Edwards	P: Tricare
2/7/17	9-9:30a	M. Edwards	P: Tricare
2/6/17	9:30-11a	M. Edwards	P: Tricare: Active..
2/6/17	9-9:30a	M. Edwards	P: Tricare: Active..
2/1/17	9:30-11a	M. Edwards	P: Tricare: Active..

ERA List

Reconcile all

Bulk updates

Include service line adjustments

Bulk Post Payment

Reconcile all payments on this page

Bulk Actions Actions

Reconcile All

ERA/835/EOB			RELATIVE ADJUSTMENT BREAKDOWN			RECONCILED IN CENTRALREACH				
Ins. Adj.	Patient Resp.	Ins. Pmnt	Rel. Adj.	Calc. Adj.	Ins. Adj.	Total Adjustment	Patient Resp.	Insurance Paid Amt.	Record Date	Pmt. Label
		\$50.00						\$50.00	06/01/2016	0
		\$120.00						\$120.00	06/01/2016	0
\$30.00							\$0.00		06/01/2016	0


ERA LIST

Bulk Update

Labels

Dates

Tasks & Notes

Rockstar Therap... 

Bulk Actions ▾ Reconcile All


RELATIVE
ADJUSTMENT
BREAKDOWN

LABEL ALL
Claims
Billing Entries
Billing Entries
Payments
Create Task
Edit Paid Date
Edit Notes

el. C
dj
Adj

ENTRALREACH

Record
Date

 Change

06/01/2016

06/01/2016

\$120.00

\$120.00

\$0.00

Service Line Adjustments

Claims 835 Details **Payments**

Payment ID: 57390 Claim: 560344 Total Amount: \$750

BILLING ENTRY INFO/CLAIM CHARGES

	Billing Labels	Client Payer	Payment Type	Copay	Units	Time	Charges	Agreed	Calc Adj.	Group
Jan 01 2015: 0364: 0364 Test Code		Change Payor	Change Payment Type							
<input checked="" type="checkbox"/> Jan 01 2015: 0365: 0365 Test Code	1	AAA Michigan: S...	Electronic	\$0.00	1	00:30	\$50.00	\$50.00	\$0.00	
<input checked="" type="checkbox"/> Service Line Adjustment	1	AAA Michigan: S...	Electronic	\$30.00	3	01:30	\$150.00	\$150.00	\$0.00	
<input checked="" type="checkbox"/> Jan 02 2015: 0368: 0368 Test Code		AAA Michigan: S...	Activity							PR - Pa
Jan 03 2015: 99199: 99199 Test Code	1	AAA Michigan: S...	Electronic	\$0.00	4	02:00	\$200.00	\$200.00	\$0.00	
<input checked="" type="checkbox"/> Service Line Adjustment	1	AAA Michigan: S...	Electronic	\$20.00	4	01:00	\$100.00	\$100.00	\$0.00	
<input type="checkbox"/> Service Line Adjustment		AAA Michigan: S...	Activity							PR - Pa

Bonus Features

Agreed Rate

- Accurate reporting
- Remove sales adjustment posting

AWS RedShift

- Access to data tables
- Integration to custom reporting softwares

The image shows a screenshot of a 'CHARGES' table. A circular callout highlights the 'Billed' and 'Agreed' columns. The table has columns for 'Billed', 'Agreed', 'Calc Adj', 'AMOUNT', 'Calc Adj', and 'Copay'. The data rows show values for these columns, with some cells containing a small icon.

CHARGES					
Billed	Agreed	Calc Adj		AMOUNT	
150.00	120.00	30.00			
56.00	50.00	6.00	30.00	0.00	0.00
150.00	120.00	30.00	6.00	0.00	0.00
56.00	50.00	6.00	30.00	0.00	0.00
150.00	120.00	30.00	6.00	0.00	0.00
56.00	50.00	6.00	30.00	0.00	0.00
150.00	120.00	30.00	6.00	0.00	0.00
56.00	50.00	6.00	30.00	0.00	0.00

PRACTICE MANAGEMENT

Features & Functionality Coming Soon

FEATURES & FUNCTIONALITY COMING SOON

Find A Provider

The screenshot shows a search interface for finding providers. On the left, a 'Filters' sidebar is visible, with a circular callout highlighting the 'Apply Availability Filters' button. The callout also shows the 'Availability' section with a 'Time of Day' slider set to 'Between 9:00 AM and 2:00 PM' and a 'Minimum Time' slider set to 'At least 3:00 hours'. Below these are 'Weekdays' options: 'All week', 'Workdays', and 'Weekend', with checkboxes for each day of the week (M, T, W, T, F, S, S).

The main search area includes a search bar with the placeholder text 'Search by provider, insurance, group...'. Below the search bar, the results are displayed for the 'Week of 02/06/2017'. The results are organized into a table with columns for the day of the week (Mon 2/6) and specific time slots. Each provider entry includes a profile picture, name, and address, followed by a grid of available time slots.

Provider	Address	Mon 2/6
Steve Berman	123 Anywhere New York, NY 13100	9am, 9:15am, 9:30am, 9:45am, 10am, more...
Katy's Cat Therapy	5373 Creekside Trail Sarasota, FL 34243	5am, 5:15am, 5:30am, 5:45am, 6am, more...
Jessie Johnson	New York, NY 10002	1pm, 1:30pm, 2pm, 2:30pm, 3pm, more...
Buzz Lightyear	123 St. New York, NY 10010	
Buzz Lightyear	123 Ave. New York, NY 10018	8am, 8:15am, 8:30am, 8:45am, 9am, more...
Bob O'Dell, MA	123 Happy Lane New York, NY 10002	
Bob O'Dell, MA	1000 Home Street New York City, NY 01000	9am, 10am, 11am, 12pm, 1pm, more...
Beth Spikes	123 Anywhere Street Ft Lauderdale, FL 33331	9am, 10am, 11am, 1pm, 2pm, more...

FEATURES & FUNCTIONALITY COMING SOON

Client Portal

The screenshot displays a web interface for managing invoices. At the top, there is a search bar labeled "Search invoices...". Below it, a table lists various invoice items. A red button labeled "Print Selected" and a blue button labeled "Send Invoices to Clients" are positioned above the table. A hand cursor is pointing at the "Send Invoices to Clients" button. The table has columns for checkboxes, "Type", "Ref #", and "Client".

<input type="checkbox"/>	Type	Ref #	Client
<input checked="" type="checkbox"/>	copay		Sample Client (ID: 378286)
<input checked="" type="checkbox"/>	activity	662081	Monica Edwards (ID: 65248)
<input checked="" type="checkbox"/>	activity		Monica Edwards (ID: 65248)
<input type="checkbox"/>	copay	649821	Monica Edwards (ID: 65248)
<input type="checkbox"/>	client	635058	Monica Edwards (ID: 65248)
<input type="checkbox"/>	client	632518	Monica Edwards (ID: 65248)
<input type="checkbox"/>	client	629154	Monica Edwards (ID: 65248)
<input type="checkbox"/>	copay	626057	Monica Edwards (ID: 65248)

FEATURES & FUNCTIONALITY COMING SOON

Payment Reconciliation

The screenshot shows a software interface for "Rockstar Therapy Services" with a navigation bar containing icons for home, group, messages, calendar, and currency. A search bar is labeled "Search transactions...". Below the search bar are tabs for "Batches", "Transactions", and "Payments", along with filters for "All Dates" and "All".

The main area displays a table with columns: "Deposit Date", "Reference", "Batch", "Account", "Amount", "Reconciled", and "Outstanding". A row is visible with the following data: Deposit Date: 11/03/2016, Reference: 982743, Batch: transaction-batch-import..., Account: Bank of America, Amount: \$30.00, Reconciled: \$30.00, Outstanding: \$0.00.

Two circular callouts highlight specific features:

- The top callout shows a download icon and a "100 per page" dropdown menu.
- The bottom callout shows a "+ Manual" button, a refresh icon, a date range "Oct 27 - Nov 3", a text input field containing "Payment Reference: 982743" with a clear 'X' button, and a checked checkbox labeled "Private: Invoice (Mom)".

FEATURES & FUNCTIONALITY COMING SOON

Supervision Report

Compare direct vs. supervised hours

Look to the future

Payor, client, staff, etc.

Extended Practice Management Pipeline

Carrying a credit balance

Denial management

Management task lists

Authorization pacing

Customizable notifications

Executive dashboard

Learn: Data Collection

The Many Uses of Clinical Notes and Forms

Common Uses

- Parent Meeting Notes
- Supervision Visit form
- Progress Report
- Incident Report
- Staff Tracking Document

Select a Date Range for Data Points

11/01/2016 to 02/09/2017

Sort by ▾

			Type	Status	Date Edited
<input checked="" type="checkbox"/>	- Behaviors		LT	P	11/28/2016
<input type="checkbox"/>	ABC sheet		ST	P	11/22/2016
<input checked="" type="checkbox"/>	Behaviors for Decrease		ST	P	11/09/2016
<input checked="" type="checkbox"/>	Frequency of hitting in two hours		TG	P	02/09/2017
<input checked="" type="checkbox"/>	rate of hitting per session		TG	P	02/09/2017
<input checked="" type="checkbox"/>	partial interval recording - out of seat		TG	P	02/03/2017
<input checked="" type="checkbox"/>	Frequency of SIB -- hand to head		TG	P	02/01/2017
<input checked="" type="checkbox"/>	frequency of Throwing		TG	P	12/05/2016
<input checked="" type="checkbox"/>	SIB - pinching		TG	P	11/08/2016
		Choose goal graph type	Average Weekly ▾		
<input type="checkbox"/>	combined - hitting		TG	P	09/06/2016
<input type="checkbox"/>	ABC		ST	P	10/18/2016
<input checked="" type="checkbox"/>	- Domestic Skills		LT	P	11/28/2016
<input checked="" type="checkbox"/>	Clean up Meal Area		ST	P	02/03/2017
<input checked="" type="checkbox"/>	% correct - steps of TA- clean up		TG	P	10/24/2016

The Many Uses of Clinical Notes and Forms

Best Practices & Workflows

- Using labels and filters to track important documentation
- Using signature fields for quick auto sharing with supervisors and parents
- Task system and highlight for easy review process for progress reporting
- Using sectioning on longer assessments for easy addition or deletion of unneeded information

FEATURES & FUNCTIONALITY COMING SOON

Learn: Data Collection

FEATURES & FUNCTIONALITY COMING SOON

Learning Trees

Quicker access to all your graphs

Enhanced navigation

Edit Branches quicker and easier

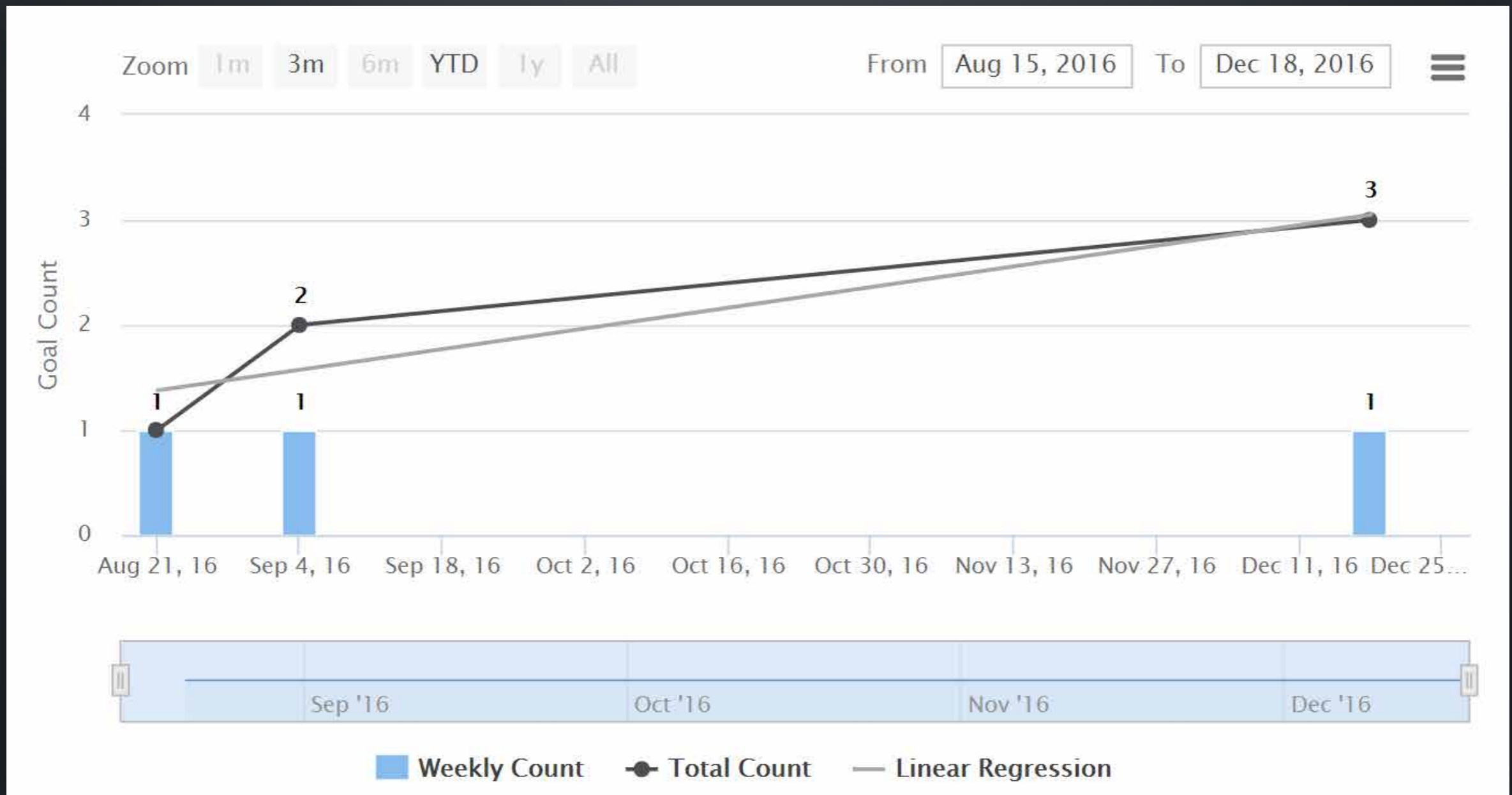
Quickly add a Branch to a Session

Further course functionality

The screenshot displays a software interface for a 'Learning Tree'. On the left is a sidebar titled 'Full Tree - Updated' with a 'Hide Tree View' toggle. It lists various branches such as 'NET', 'NET - Graph per session', 'NET Percent Correct - No Trial w/ Graph per session', 'NET Percent Independence (-) w/ Graph per session', 'NET Duration w/ Graph per session', 'NET Score w/ Graph per session', 'NET Rating Scale w/ Graph per session', 'NET Rate w/ Graph per session', 'NET Time Sampling w/ Graph per session', 'NET Task Analysis (-) w/ Graph per session', 'NET Task Analysis w/ Graph per session', and 'NET Frequency w/ Graph per session'. Below these are 'PINNED', 'ROUTINE', and 'TRIAL' categories. The main content area on the right shows a large green circle with '100%' inside, indicating 'Long Term Goals Mastered'. To the right of the circle, it says 'Goals Met Since Start 3' and 'Last Goal M NET - Graph'. Below this is a 'Most Recent Comments' section with a list of comments: 'test comment', 'another one', 'new', 'test', '1111111', 'one more here', and 'one more'.

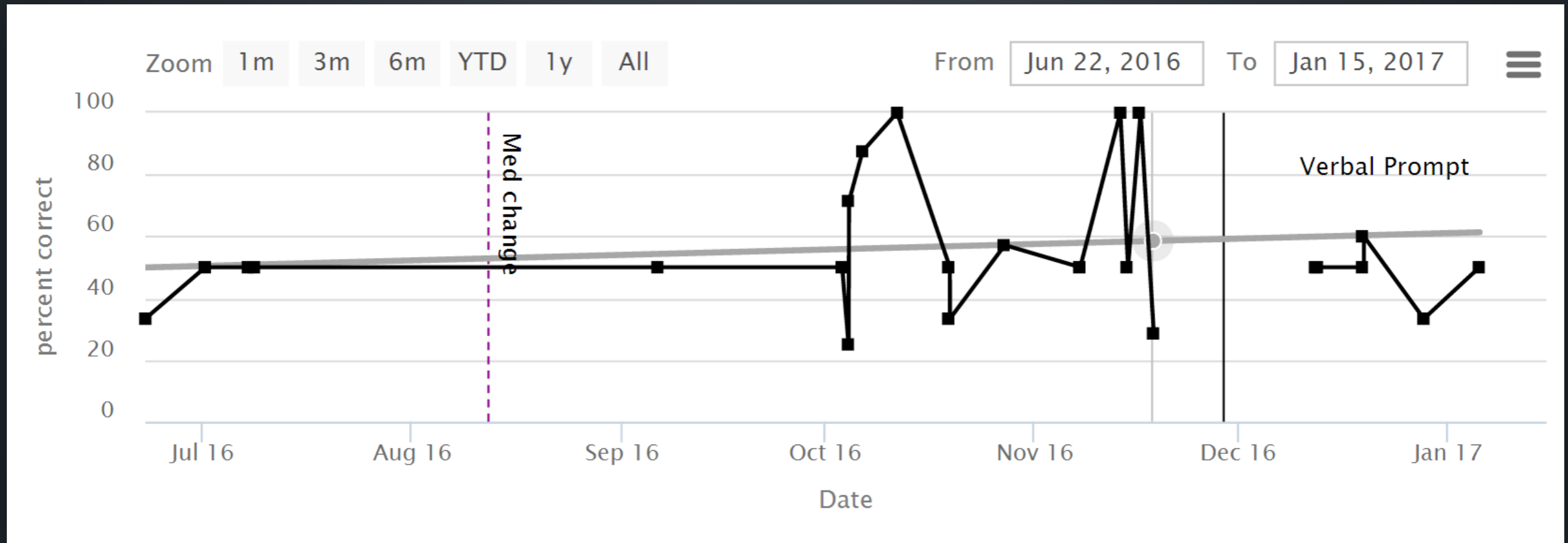
FEATURES & FUNCTIONALITY COMING SOON

Improved Cumulative Records



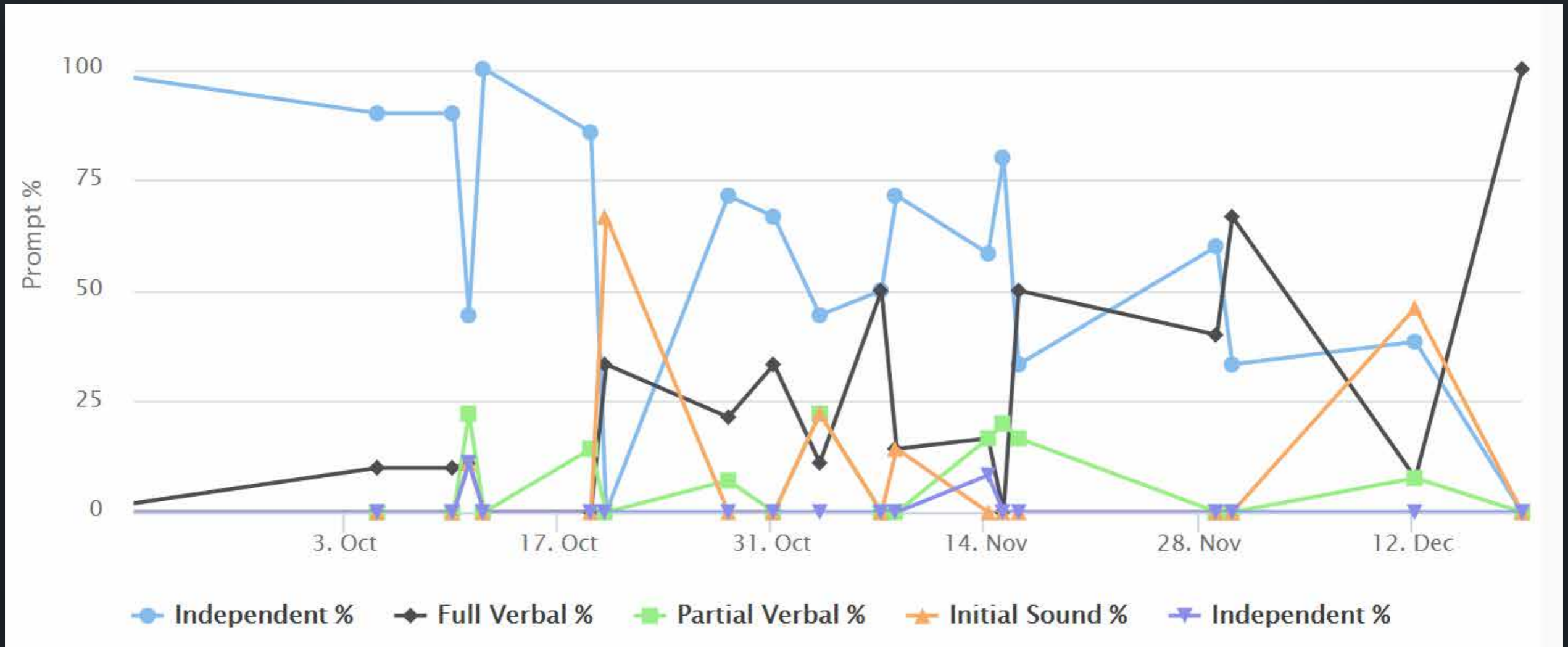
FEATURES & FUNCTIONALITY COMING SOON

Trend Lines on Graphs & Progress Reports



FEATURES & FUNCTIONALITY COMING SOON

Prompt Level Graphing



Extended Learn: Data Collection Pipeline

VB-MAPP Improvements

Assessment > Report > Goal creation

Learning Tree automatically created based on recommended goals

Scatterplot & Advanced Interval Analysis

Graph analysis in Learning Trees

Scatterplot graphs to see patterns and trends

ABC Data Collection

Improved Workflows for Schools & Multi-Discipline Clinics

Premium Features & Product Roadmap

Central**Reach**

2017 User Conference

Building the Foundation

The screenshot displays the Rockstar Therapy Services software interface. At the top, the title bar reads "Rockstar Therapy Services" with navigation icons for home, users, messages, notifications (13), currency, and a plus sign. Below the title bar is a search bar for "179 contacts..." and a filter menu with options: Everyone, Favorites, Clients, Providers, Employees, Generics, and All active.

On the left side, there are two panels. The top panel, titled "Recently", shows a list of email messages with their subjects and dates (e.g., "archiving email In reply to the foll... a month ago"). The bottom panel, titled "Sessions", shows a list of session records with titles and dates (e.g., "Daniel's 2017 Tree 23 days ago").

The central area features a "Productivity" chart. The chart shows a bar graph with a tooltip for the week of Monday, Nov 28, 2016. The tooltip data is as follows:

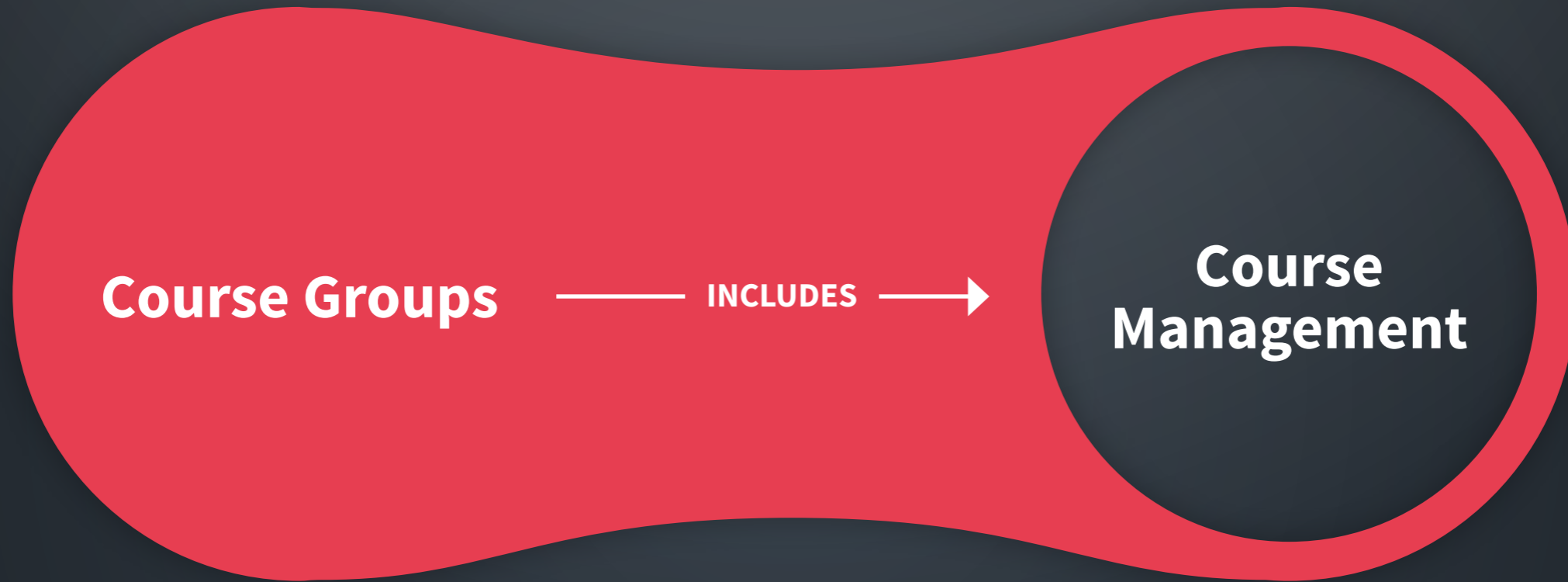
Category	Value
Worked	0 hrs 0 mins
Avail	8 hrs 0 mins
Sched	0 hrs 15 mins
Worked %	0.00%

Below the productivity chart is a "Files Added Recently" panel showing a list of files with their names and dates (e.g., "2016-01-21 15_55_25-bundles - CentralReach").

On the right side, there is a contact list table with columns: type, Id, Name, Preview, City, and State. The list contains the following entries:

type	Id	Name	Preview	City	State
E	298837	Ale Lorenzo	Preview		
C	264972	Alexandra Rocha	Preview	Boca	FL
E	260630	Amal Clooney	Preview		
C	263650	Ana Hendriks	Preview	Miami	FL
C	263646	Ana Hill	Preview	Miami	FL
C	340253	Ana Karina Kristen	Preview		
C	375693	Anabell Bees	Preview	Florida City	FL
C	235053	Andre R	Preview		
C	264971	Andre Refay	Preview	Honolulu	HI
C	313123	Andres Client	Preview		
C	310179	Andres Perez	Preview		
C	210780	AndresSS perezSS	Preview	.	FL
E	232562	Angel An	Preview		

Learning Management System



Per seat pricing model
Unlimited CEUs
RBT & HIPAA

Easily assign courses to employees
Report on employee courses
Build your own courses

Document Management Express

Send required documents to all new hires and clients

Easily audit and act on expiring or missing documentation

Put the power of insurance credentialing into the hands of the employee

The screenshot displays the 'Templates' tab of the Document Management Express interface. At the top, there are navigation tabs for 'Labels', 'Filters', and 'Templates'. Below these, the current document template is identified as 'Client Files Audit Test Group'. A search bar on the right contains the text 'Search 3 files...'. Below the search bar, there are buttons for 'All' (highlighted in blue) and 'New'. A dropdown menu shows 'Template: Client Files'. The main content area lists a folder 'Test Group of Required Documents' containing three document templates: 'Consent Form', 'Drivers License', and 'Media Release'. On the right side, a table lists the files with columns for 'Type', 'Id', and 'Name' (partially visible).




<input type="checkbox"/>	Type	Id	N
<input type="checkbox"/>		4706815	J
<input type="checkbox"/>		4706814	S
<input type="checkbox"/>		431419	A



Document Management Express


Document Manager Widget

Document Templates can be assigned to contacts using existing [Contact Labels](#). Anyone with the below Contact Label(s) will see the required documents and be able to upload files directly from their Facesheet.




✕ Great People ✕ Group Home A [Click here to add labels](#)















Document Manager ▾   

Media Release	Required Now 	Upload
Consent Form	Required Now 	Upload



Document Folders & Types

 Test Group of Required Documents  

 Consent Form	Required 	 
 Media Release	Required 	 
 Drivers License	Required 	 
 Add Document Type		
 Add Document Folder		

Applicant Tracking System

Post jobs to the top job boards in the industry with one-click

Collaborate and comment with others as you track applicants through the interview process

Simplify the onboarding process for new employees

Human Resource Information System



The CentralReach App

