

Inviscid TotalABA Help

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Summary

This document explains the intended usage of each section in the application along with any notable workflow conditions. Specific fields have detailed descriptions where it has been deemed necessary (their use, criteria and/or context are not obvious).

Please see the **Using Inviscid TotalABA** document for instructions on how to navigate around the application along with some additional related tips & tricks.

Most sections have a couple of standard sub-sections that are part of the record. These include:

1. **System Information** – Displays a record ID, the creation date/user and the last modified date/user.
2. **History** – Displays a modification history for the record that includes the date changed, the user that made the change and the field data that was updated.

As always, please contact us with any questions/concerns you may have. We can be reached at support@inviscidsoftware.com.

Accessing the Application

TotalABA may be accessed via any web browser (e.g. Internet Explorer, Google Chrome, Firefox, Safari, etc.) on any computer, tablet or other device that is connected to the internet.

You may access TotalABA with either of the following URLs: <https://inviscid.cloudforce.com> or <http://www.totalaba.com>. Regardless of the browser you are using, please make sure to allow popup windows from this site in order to utilize the full functionality of the application.

Initial Setup

The TotalABA application requires some initial setup before it can be successfully utilized. Although it may take a little bit of thought and planning, the actual work is minimal.

An administrator in your practice will be required to provide the following information:

- **List of Users** - Complete the spreadsheet provided by Inviscid with the list of users for the practice. Once your practice has been setup, all future new user requests should be submitted via the form in the Contact Inviscid Software tab found by clicking Support in the sidebar of TotalABA.
- **Inactivity Time Out** - This is the length of time after which the system logs out inactive users. The default is two hours. If a different length of time is required, please let us know. The following options for the time out length are: 15 minutes, 30 minutes, 1 hour, 2 hours, 4 hours, 8 hours, and 12 hours.
- **Password Expiration** – Determines how often the users in your practice must change their passwords. The default is never, but it may be changed to one of the following: every 30 days, 60 days, 90 days, 180 days, every year.
- **Appointment Types** – These are required to create new appointments and will be created by someone in your practice.
- **Credential Categories** – This is only required if your practice will be tracking the various credentials for your staff members. If used, they will be created by someone in your practice.
- **Expense Tracking Categories** – This is only required if Expense Tracking is used by the practice. If used, they will be created by someone in your practice.
- **Time Tracking Categories** – This is only required if Time Tracking is used by the practice. If used, they will be created by someone in your practice.

Non-MRC Billing Practices

If you are using MRC Billing, then they will setup and maintain the following sections for your practice. Otherwise, your practice is responsible for creating/maintaining this information.

- Billing Providers (Staff Members) – A billing provider is required to sign-off on a session.
- Diagnosis Codes
- Insurance Funding Sources
- Locations
- Modifier Codes
- Procedure Codes (CPT)

Customization

Many areas of TotalABA may be customized included security, fields, reports, etc. Please contact us if any customization in your TotalABA site is desired.

Sidebar

The sidebar appears on almost all tabs of TotalABA (exceptions include Calendar and Reports). It is displayed or collapsed by clicking on the arrow icons:



The sidebar displays the following information:

- **Search** – Allows you to search across all records in your practice or a specific type of record.
- **Recent Items** – Displays the last ten records for each category (students, appointments, sessions, authorizations and other) that you have accessed.
- **Create New...** - Allows you to quickly create a new record based on the tabs you have displayed (assuming you have the correct privileges).
- **Custom Links** – Contains links for Support and Settings which are described in further detail below.

Support

The support link contains tabs for the following:

- **On-Line Training** – Contains links to our training videos and documentation.
- **Release Notes** – Has a link to these release notes.
- **Contact Inviscid Software** – Lists the various ways to get in touch with us. Also includes any applicable forms such as the new user request.
- **MRC Support** – Contains the Medical Reimbursement Consultants contact information. Also has links to their various forms like adding new users to TotalABA. This is only available for practices that use MRC Billing.

Settings

The settings link contains various tabs for customizing the application. Some tabs may not be available depending upon your permissions. These are user settings (unless noted otherwise), meaning that each user in your practice will need to set this up for themselves if desired. However, if there are practice defaults that should be used, please contact us to have these updated.

- **General** – This section allows a user to upload their digital signature. It is used when Print Clinical Documentation is clicked from a session and that session is signed-off (the signature of the sign-off user will be on the session print page if available).
- **Schedule** - This contains the Schedule Settings which are also accessible via the Calendar tab. See the Calendar / Schedule Settings section below for further information.
- **Sessions** – This contains settings that are applicable to sessions. An option is available to return to the session list after signing off on a session. If this option is not checked (the default), then the user is returned to the session record. Also, the ability to set default values for the activity, progress and impressions are also available.

- **Lessons** – This contains settings used when entering lesson data in TotalABA. Please see the TotalABA Clinical Documentation for further information.

Practice Admin Settings

The Practice Admin tab contains the application settings that apply to all users in Total. It is only accessible to administrators in the practice.

- **Logo Settings** - Allows a user to upload the practice's logo and also control the relative height and width of the logo so that it appears correctly. It is used on the PDF form when printing from a session, treatment plan or assessment. It will also be used in future releases.
- **Session Settings**
 - **Require Clinical Fields for Sign-Off** – This determines if the Activity, Progress and Impressions fields on the session must be filled out in order to sign-off on a session.
 - **Prohibit Multiple Sessions per Appointment** – If checked, then an appointment may only have a single session created. This may help prevent duplicate sessions in the practice.
 - **No Sign-Off if Canceled** - Does not allow sessions to be created for appointments that are canceled. Furthermore, if a session exists for a canceled appointment it may not be signed-off.
 - **No Sessions in the Future** - Does not allow sessions to be created for appointments that occur on a future date. This helps eliminate mistakes of sessions being created for the wrong appointment.
 - **Set Applied Minutes to Billable Minutes** – If checked, then the applied minutes on the appointment will be updated to the sum of the billable minutes of all sessions for that appointment. This is used to calculate the used minutes on the corresponding authorization (if available). If unchecked, then the applied minutes on the appointment will be equal to the duration and it is the responsibility of the practice to update the applied minutes when needed.
 - If checked, automatically updates the applied minutes on the appointment to the billable minutes of the session(s) any time a session is saved. This is
 - **Time Tracking Synch Method** – Select an option to have a time tracking automatically created and synchronized with every new session. See Time Tracking for further details.
 - **Time Tracking Category** – Select the category that is used for all new, automatically created time tracking records for the synch method.
 - **Only Allow Session Sign-Off if Status Equals** – Select a status to prohibit sessions from being signed-off unless the status is a specific value (e.g. Ready for Review). The default is –None- which means a session can be signed-off regardless of the status.
 - **Session Print Optional Fields** – These fields may be included on the Print Clinical Document page from a session if desired by the practice. Simply select which additional fields to include.
 - Appointment Type
 - Billing Provider

- Billing Provider Credentials – This is a comma delimited list of credential types from the staff member record. The corresponding credential category must have Include for Staff Member Print checked.
- Therapist
- Therapist Credentials – This is a comma delimited list of credential types from the staff member record. The corresponding credential category must have Include for Staff Member Print checked.
- Student Representative Signature – This will include the student representative's signature, printed name when it was signed.
- Therapist Signature – This will include the therapist's signature, printed name when it was signed.
- Location
- Diagnosis Codes
- Procedure Codes
- **Print Consolidated PDF** – If checked and all sessions that are being printed are for a single student, then the header information is only printed on the first page and there is not a new page for each session. This is useful to save paper when printing out sessions for the student. Note that this setting may be overridden on the print multiple sessions page.
- **Appointment Settings**
 - **Limit Appointment Assignment to Student Assigned Therapist(s)** - If checked and a student has one or more assigned therapists listed, then the assigned to on the appointment can only be one of the assigned therapists on the student record. If the student does not have any assigned therapists, then any applicable staff member may be assigned to the appointment.
 - **Limit Appointment Locations to Student Location(s)** – Does not allow an appointment to be saved if the location on the appointment does not match one of the student locations. This does not apply if the student does not have any student locations.

Clinical Documentation and Data Collection

The clinical portion of TotalABA helps your practice maintain, document, and analyze the student's history and progress. Please see the TotalABA clinical help and videos for further information at <http://www.inviscidsoftware.com/trainingVideos.aspx> or contact us for additional details.

Appointments

Appointments allow a practice to manage the schedule of their staff and students. An existing appointment may be copied by using the Clone button while viewing the appointment. Simply change

the start date and time and the rest will be copied over. Appointments may be viewed in many different manners via the Calendar tab.

Appointment email notifications may be sent to the Assigned To of the appointment if that user has selected the appropriate notifications. See Calendar / Edit Schedule Settings for further information.

In addition to being able to create a new appointment from the Appointments section, it may also be created from the following:

- **Student** – Will automatically populate the student field.
- **Authorization** – Will automatically populate the student and authorization fields.

An appointment consists of the fields below:

- **Appointment Type** – This is a selection from existing appointment types. Please see the Appointment Type section for further information.
- **Scope** – This will be automatically populated based on the selected appointment type. The scope may be:
 - **Student (Therapy)** – Used for scheduling student appointments. These are typically billed to an insurance company or directly to the student (private pay).
 - **Student (Non-Therapy)** – Used to block off time for a student so conflicting appointments are not created. Some examples include a student's vacation, sport practices/games, summer camp, etc.
 - **Non-Student** – Used to schedule appointments that are not related to a student. Some examples include staff member time off, staff meetings, etc.
- **Student** – The student for the appointment. This is disabled and blank if the appointment scope is Non-Student.
- **Status** – Select the appropriate status for the appointment. The default for new appointments is Scheduled.
- **Cancellation Reason** – This is required when the status is Canceled. A pre-defined list of reasons may be selected. This will allow your practice to track and analyze why appointments are being canceled.
- **Reason** – Allows for a short description of the appointment. This field is optional.
- **Time Zone** – This is only displayed if the "Display Time Zone Selector" schedule setting is checked. This allows the user to specify the time zone of the appointment. It will be automatically set to the Default Time Zone from the schedule settings on a new appointment. The user's current time zone is indicated by a * at the end.
- **Recurring Appointment** – Check this box if the appointment should be repeated based on a user defined pattern. See the **Recurring Appointment** section below for further details and instructions on the newly available fields.
- **Appointment Date** - Select the date of the appointment. You can enter in the date or use the **calendar** to select the date.

- **Weekday** – This field is available when viewing the appointment details and shows the day of the week (e.g. Wednesday) of the appointment. It is useful for filtering lists and creating reports for a particular day if required.
- **All Day Event?** – Check this box if the appointment should span the entire day. Typically, this is used for items like a Therapist vacation, conferences, student vacations, etc. If selected this will automatically set the duration to 1,439 minutes and disable that field.
- **Start Time** – Select the start time for the appointment. You can also enter the time.
- **End Time** – Select the end time for the appointment. You can also enter the time. The duration will be automatically set based on the start and end times. Alternatively, you can enter a start time and duration. In this case, the end time will be automatically set.
- **Duration (minutes)** – Enter the length of the appointment in minutes (e.g. 90 for a 1.5 hour appointment). Alternatively, you can enter the end time and the duration will be automatically calculated.
- **Use Applied Minutes** – This is unchecked by default. If unchecked, then Applied Minutes will always be equal to the Duration after saving the appointment. If checked, then the Applied Minutes may be edited by the user.
- **Applied Minutes** – This field is used to determine the number of minutes used against the corresponding Authorization. It will default to the same value as the Duration. However, it is possible that the two values may be different. For example, if the appointment duration is 90 minutes, but only 60 minutes were spent on the authorized therapy. Use Applied Minutes must be checked in order to set this to a different value than the Duration. If **Set Applied Minutes to Billable Minutes** is enabled (see Sidebar / Settings / Practice Admin Settings), then the applied minutes will be automatically updated to the sum of the billable minutes of all sessions for the appointment.
- **Authorization** – If applicable, select the authorization for the student that this appointment applies to. Not only will the applied minutes be used against the authorization, but the Authorization # will also be used when transferring the resulting session to LeonardoMD Renaissance for billing purposes.
- **Assigned To** – Select the person whose schedule this appointment should be placed on. The appointment will also be shown on this user's calendar. The user must have Allow Scheduling set to Yes in the user setup in order to be a valid selection. Furthermore, only users with a TotalABA license type of Full-Time Therapist or Part-Time Therapist may be assigned to an appointment with a Scope of Student.
- **Location** – Select the location for this appointment. This value will also be used when transferring the resulting session to LeonardoMD Renaissance for billing purposes. If your practice only has a single location, then this will be the default for new appointments. The default location may also be set in the Schedule Settings and in the Appointment Type.
- **Additional Attendees** – On new appointments you can add anyone else that should be part of the appointment. Please see the Attendees section below for further details.
- **Comments** – Enter any comments related to the appointment in this field.

Furthermore, there are three additional fields that are not displayed on the appointment, but are available in the lists and reports. These fields are also displayed when clicking on an appointment from calendar:

- **Session #** - The number of sessions created for the appointment.
- **Time Tracking #** - The number of time tracking records created for the appointment.
- **Expense Tracking #** - The number of expense tracking records created for the appointment.

Associated records are also available on the appointment record. This means that the record has a direct link to the appointment. The associated record types are:

- Sessions
- Time Tracking
- Expense Tracking

Attendees

This section displays all persons that are scheduled to be part of the appointment. It includes the Student and Assigned To, although those two people are maintained by the corresponding fields on the appointment.

Additional Attendees may also be added to the appointment. They are similar to the Assigned To in that they must be users in the practice and have the same restrictions as the Assigned To. Furthermore, appointments for additional attendees will display in their calendar and have the same restrictions and notifications as the Assigned To.

If additional attendees are part of a recurring appointment when it is created, they will be included in all instances of that appointment. However, once the appointments are created, only each individual appointment may be modified.

Recurring Appointments

A new appointment may be repeated if desired by checking Recurring Appointment. An existing appointment cannot be turned into a recurring appointment or have its recurrence pattern altered. Furthermore, recurring appointments cannot be dragged & dropped in the calendar unless that Schedule Setting is enabled. Once Recurring Appointment is checked, the following fields will be available.

- Recurrence Pattern
 - Every – Enter the how often the appointment should repeat based on the type below:
 - Day(s) – This indicates the appointment will repeat every X number of days. For example, a value of 1 indicates it will repeat every day, while a value of 2 indicates it will repeat every other day.
 - Week(s) – This indicates the appointment will repeat every X number of weeks on the selected days of the week. For example, if you wish to create a recurring appointment every Monday, then enter every 1 week(s) and select Monday. If

it should be every other Monday, then enter every 2 week(s) and select Monday.

- Month(s) – This indicates the appointment will repeat every X months based on the selection of the day of the week within the month. For example, if an appointment should occur on the first Friday of each month, then enter 1 month(s), on the first Friday.
- Year(s) – This indicates the appointment will repeat every X years.
- From – Enter the date when the recurrence should start. Then choose **for** if the appointment should repeat for a set amount of occurrences or **until** to enter a date when the recurrence should stop. The maximum number of occurrences is 100.
- Generate – Click the **Generate** button once all the recurrence information is entered. This will populate the Recurrence Description and Recurrence Dates fields. This is required in order to save the appointment.
- Recurrence Description – This is a read only field which describes the current recurrence pattern once Generate is clicked.
- Recurrence Dates – This is a read only field that shows each date in the recurrence pattern once Generate is clicked.

Hint: If there is ever any doubt about which recurrence settings to make, use the Generate button to see the description and dates. You can then confirm that the selections are correct or you can make the necessary changes and regenerate the description and dates.

If the appointment scope is Student (Therapy) and an authorization is selected, then additional validation is automatically performed before the appointment is saved. Specifically, the recurrence dates are checked against the authorization start date, expiration date and remaining minutes/visits to ensure that the appointments will not be created on dates where the authorization is expired. If any of the dates fall in an expiration period, then an error will appear after clicking save explaining the details. Furthermore, a new field named **Confine to Authorization** will be available that must have a selection made before the appointment can be saved. The options are:

- Yes – Select this value if the appointment recurrence should be limited to the dates where the authorization can still apply. The appointment will not be created for any other dates in the recurrence pattern.
- No – Select this value if the appointment should still be created on the dates outside of the active authorization period. On those dates, there will not be an authorization on the appointment. In other words, an appointment will be created for every recurrence date; however, some of the appointments will not have an authorization.

Once a recurring appointment has been created, it cannot be modified across all the appointments in the recurrence pattern. If it ever needs to be updated (e.g. the start time, assigned to, attendees or duration should be changed), then the best way to handle this is to delete all the appointments in the recurrence pattern then recreate them. Fortunately, this is easy to do. Simply open any appointment in the recurrence pattern and then click the Delete button. Choose the option to delete “This

appointment and all appointments in this recurrence pattern. Then choose “All dates” assuming that the entire recurrence should be deleted, otherwise choose “From mm/dd/yyyy” and beyond where the date is the date of the appointment opened. Finally select to **Permanently delete them**. More information on deleting appointments can be found below.

Deleting Appointments

The delete button on the appointment will present several different options, depending on the existing appointment conditions. These will determine which appointments are affected.

1. This appointment only – This is the default option. Only this appointment will be canceled or deleted.
2. This appointment and all appointments this recurrence pattern – This only applies if the appointment was part of a recurrence.
3. This appointment and all appointments this student – This only applies if the appointment has a scope of Student. This option is restricted to specific users. If you require this ability, please contact us.
4. This appointment and all appointments for this assigned to – This option will not be available for appointments with a scope of Student (Non-Therapy). This option is restricted to specific users. If you require this ability, please contact us.
5. This appointment all appointments on this date – This option applies to all appointments on the specified date, regardless of the scope, student or assigned to. This option is restricted to specific users. If you require this ability, please contact us.

If choices 2 through 4 are selected, then the date range must be selected for the deletion. There are two options.

1. From (mm/dd/yyyy) and beyond – Choosing this option will only delete the selected appointments in the first step for the specified date and future dates. Any appointments prior to that date will be unaffected. The date is based on the start date of the current appointment where the Delete button was clicked.
2. All dates – Selecting this option will delete all appointments that are part of the selection (e.g. all appointments in a recurrence pattern).
3. Specific Dates – Enter the start and end dates of the appointments to be deleted. All appointments with a date that is on or between the dates will be selected.

In all cases, there will be two different actions that can be applied to the selected appointment(s).

1. Flag them as canceled – All appointments affected by the delete action will have their status changed to Canceled. Furthermore, a Cancellation Reason must be selected (the field will appear once this option is selected).
2. Permanently delete them – All appointments affected by the delete action will be removed from the system. This should only be used if the appointments are no longer valid and a history of them is not required.

Print Assigned To Appointments

This button at the top of the appointment view page will launch a report of all future, scheduled appointments for the assigned to on that appointment. It is useful for generating a list of appointments for the therapist (or any other potential user). This report can then be printed or saved to Excel, etc.

Appointment Types

Appointment types are used by appointments and authorizations; furthermore, they control the appearance of the appointment in the calendar. They help define and categorize appointments within the practice. They consist of the following fields:

- **Name** – This is the name of the appointment type and is displayed when selecting the appointment type on an appointment or authorization.
- **Active** – By default this will be checked. It should be deselected if the appointment type should no longer be a valid selection. Note that once an appointment type is used by an appointment or authorization, it may not be deleted.
- **Scope** – Select one of the following:
 - Student (Therapy) – Used for scheduling student appointments. These are typically billed to an insurance company or directly to the student (private pay).
 - Student (Non-Therapy) – Used to block off time for a student so conflicting appointments are not created. Some examples include a student's vacation, sport practices/games, summer camp, etc.
 - Non-Student – Used to schedule appointments that are not related to a student. Some examples include staff member time off, staff meetings, etc.
- **Non-Billable** – By default this will be unchecked. If checked, then appointments with this type cannot have a session created and they also cannot have an authorization selected. This will allow your practice to schedule Student (Therapy) appointments that should not be billed.
- **Default Location** - This optional field is used to set the location on a new appointment once the appointment type is selected. It will override the default location from the user's schedule settings if they have made a selection.
- **Require Authorization** – By default this will be unchecked. If checked, then any appointments that use this appointment type must include an authorization in order to be saved.
- **Default Billing Provider** – This optional field is used to set the billing provider for new sessions. The selected billing provider will be used for a new session, assuming the student does not already have a default billing provider and there is not an authorization for the appointment with a billing provider.
- **Default Duration** – This optional field is used to set the duration on a new appointment once the appointment type is selected. It may be populated if the all new appointments for this type typically are for the same amount of time. The value must be in minutes.
- **Color** – Click on this field to bring up the color chart and select a color for this appointment type. This controls the background color of the appointment on the various calendars. It is suggested that darker colors are used here as the foreground text in the calendar will always be white.

- **Color Description** – Enter a color description for the selected color (e.g. Light Blue or Dark Red). Since the color field only displays the hexadecimal representation of the color in the list views, this description may be helpful when comparing the appointment types in your practice.

Associated People

Associated people are used in the application for various purposes including, but not limited to: the insured on an insurance coverage, guarantors, emergency contacts and general contacts. Essentially, these are the various persons that may be associated to a student.

If your practice is integrated with LeonardoMD Renaissance, any necessary associated people such as the insured or guarantor will be automatically synchronized from Renaissance into TotalABA. You may create additional associated persons as needed for use as emergency contacts, authorized pickups, general contacts, etc.

Authorizations

Authorizations serve several purposes in TotalABA. The first is to track therapy that the funding source has authorized for the student, including the authorized number of minutes/visits and the expiration date of the authorization. This is accomplished by selecting the authorization on appointments. It is possible that an authorization may be only for a date range or only for an authorized number of minutes/units.

The second purpose is to record an authorization number that will be sent across to LeonardoMD Renaissance when a session has been signed-off for billing and will be part of the resulting claim.

The following fields are available on the authorization record:

- **Student** – This is automatically populated when creating an authorization from a student or insurance coverage. Otherwise the student must be selected. Once a new authorization has been saved, the student cannot be changed.
- **Status** – This is a calculated value that will either be Active or Expired. The status will change from Active to Expired if one or more of the following conditions are met:
 - The expiration date has passed
 - The number of visits remaining has reached zero
 - The number of minutes remaining has reached zero
- **Contract** – Select the student's contract/funding source that authorized the therapy.
- **Billing Provider** – This is the provider the funding source gave the authorization for (if applicable). This should be left blank if the authorization is not based on a specific billing provider. If a value is entered here, then it will be used on any corresponding new sessions.
- **Start Date** – This is the date the authorization period begins on.
- **Expiration Date** – This is the date the authorization period ends on. This will also enable you to run reports on which authorizations are expiring soon or have recently expired.

- **Appointment Type** – This is optional but can help ensure that the correct authorization is selected when scheduling appointments. For example, if a student has separate authorizations for ABA therapy and speech therapy you will be able to see which one is appropriate for the appointment being scheduled. Furthermore, when an appointment is created from the authorization, the appointment type will be automatically selected.
- **Authorization #** – If the insurance company provided an authorization number, it should be entered here. This will automatically be sent across to LeonardoMD Renaissance when a session has been signed-off for billing and will be part of the resulting claim.
- **Allow Overbooking** – If checked, the authorization may be selected on an appointment even after it has expired. The default for new authorizations is unchecked.
- **Procedure Code** – If the authorization is based on a procedure code, enter that code here. If multiple procedure codes were authorized, create a separate authorization for each one. This should be left blank if the authorization is not based on a procedure code. If a value is entered here, then it will be used on any corresponding new sessions.
- **Authorized Visits** – If the authorization is based on visits, the number should be entered here. A visit is an individual session, regardless of the amount of time spent. If the authorization is based on minutes, leave this value at 0 and use the Authorized Minutes field instead.
- **Authorized Minutes** – If the authorization is based on minutes, the number should be entered here. Note: you may need to convert hours to minutes if the authorization was given in hours. If the authorization is based on visits, leave this value at 0 and use the Authorized Visits field instead.

Furthermore, the following fields are automatically calculated on the authorization record based on the corresponding usage in appointments (Applied Minutes). They are displayed when viewing the authorization.

- **Remaining Visits** – If the authorization is based on visits (Authorized Visits is not equal to zero), then this is the number of Authorized Visits minus the number of Scheduled and Used Visits.
- **Used Visits** – This is the number of visits that have been completed. A completed visit is an appointment with the authorization that has occurred in the past and does not have a status of canceled.
- **Scheduled Visits** – This is the number of visits are scheduled in the future (an appointment with the authorization that does not occur until after the current date/time and does not have a status of canceled).
- **Remaining Minutes** – If the authorization is based on minutes (Authorized Minutes is not equal to zero), then this is the number of Authorized Minutes minus the number of Scheduled and Used Minutes.
- **Used Minutes** – This is the number of minutes that have been completed (an appointment with the authorization that has occurred in the past and does not have a status of canceled).
- **Scheduled Minutes** – This is the number of minutes are scheduled in the future (an appointment with the authorization that does not occur until after the current date/time and does not have a status of canceled).

Associated records are also available on the authorization record. This means that the record has a direct link to the authorization. The associated record types are:

- Appointments
- Notes & Attachments

Calendar

The calendar offers a visual representation of the scheduled appointments in your practice. Today's date will be highlighted in yellow. New appointments may be created in the calendar by clicking on the start time and dragging to the end time. Existing appointment details may be viewed by clicking on the appointment within the calendar. To actually open the appointment record, click on the **View** button in the appointment details popup window. You can modify the appointment and return directly to the calendar upon saving by clicking on the **Edit** button in the appointment details popup window. Click the **Cancel** button to quickly change the status of the appointment to canceled or to update the cancelation reason.

Sessions for the appointment may also be accessed by from the appointment details popup window. On the session line, the **New** button to quickly create a new session for the appointment (a warning will be displayed if a session already exists for the appointment). If a single session already exists for the appointment, click the **View** button to open the session and the **Edit** button to modify the session. Note that the view and edit buttons are not available if the appointment does not have a session or has more than one session.

Above the calendar are options for navigating and viewing the calendar. Select **my schedule** to view only appointments that are assigned to you. Select **schedule views** to view appointments for the selected users (not all users have access to schedule views).

See the scheduling training videos at <http://www.inviscidsoftware.com/trainingVideos.aspx> for further information.

Schedule Views

Schedule views give the user the ability to filter what appointments display on the calendar based on the staff member (attendee), appointment scope, appointment type, and location. Multiple schedule views may be created & saved allowing the user to quickly navigate between various criteria. The schedule views are specific to the user and are not shared with others. By default, all appointments are displayed for a new user.

Click **schedule views** at the top of the calendar to access the views. The current view is displayed to the left of the calendar. The **manage** button opens the schedule views where the following actions can be performed.

- Make changes to an existing view including the filter criteria and the view name. Once the changes are made, click the **Save** button.

- Make a copy of an existing schedule view by selecting the view and click the **Save As** button (you must first give it a unique view name).
- Create a new schedule view by clicking the **New** button, then enter the view name and make the selection criteria. Then click **Save**.
- Delete an existing schedule view by selecting the view and clicking the **Delete** button.

You have the option of requiring all staff member credentials or any of the selected credentials when filtering the schedule view based on the staff member credential. Select Require All Credentials at the top of the manage schedule view form to require all credentials, leave it unchecked if any one of the credentials should be considered a match. See staff members for further information on filtering the schedule.

Calendar Views

TotalABA provides different ways to view the calendar. The various views are described below and may be accessed clicking the button in the upper right of the calendar immediately to the left of the “my schedule” button.

Day, Week, Month Views

These views display the appointments for the user if **my schedule** is selected, otherwise they show all appointments that meet the **schedule views** filter criteria (default is all). The day and week views are organized by the date across the top and vertically by the time of the day on the left. Furthermore, the day and week views can also be further grouped by resource if desired (see **Day/Week View Group By Resources** in the schedule settings).

Resource Day, Week, Month Views

These views show all scheduled appointments for the staff member schedules that are selected in current schedule view. They are organized vertically by the person assigned to the appointment and are useful for finding which staff members have free time available.

Student Day, Week Views

These views show all scheduled appointments for the students in your organization. Students are only listed if they have an appointment for the selected day/week. Furthermore, only appointments with a scope of “Student (Therapy)” are displayed. Please see the student calendar (student page) to view all student appointments including those with a scope of “Student (Non-Therapy)”.

Location Day, Week Views

These views display appointments organized by location. Under each location, the staff members are listed that have at least one appointment scheduled in that location. The locations may be collapsed by clicking the down arrow icon to the left of the location name. If an appointment does not have a location (e.g. non-student), then it will be categorized as “No Location”. Locations are only listed if they have an appointment for the selected day/week.

List View

The list view will display all appointments in a vertical list for the selected day, sorted by the appointment start time. The start and end times are displayed followed by a colored circle indicating the appointment type. Next is the student name / appointment type unless it is a non-student appointment. In this case, it will be the assigned to / appointment type. You can click anywhere besides the appointment like to display the appointment pop-up window with further details.

Schedule Settings

On the upper left side of the calendar is a button that allows the user to control certain display and usage aspects of the schedule. Note that these are personal settings and do not apply to the other users in the practice. This is also available via the Custom Links / Settings in the sidebar. The following options are available:

- **Show Comments On Home Page Calendar** – Check this option if you would like any comments on an appointment to be displayed on the home page calendar.
- **Display Associated Record Counts** – This will display the number of sessions, time tracking and expense tracking records linked to the appointment on the calendar. These are displayed at the end of the appointment with just numbers. For example, 1/0/2 means there are one session, zero time tracking and two expense tracking records. These fields may also be used in the Appointments lists and corresponding reports.
- **Enable Appointment Drag/Drop** – Check this option to allow for appointments to be dragged and dropped onto new dates and times. Some users like to disable this option as they find themselves accidentally moving appointments. Note: recurring appointments cannot be dragged & dropped unless Enable Recurring Appointment Drag/Drop is selected. Recurring appointments may still be edited; however, changes only effect the existing appointments and not the other appointments in the recurrence pattern.
- **Enable Recurring Appointment Drag/Drop** – Check this option to allow for recurring appointments to be dragged and dropped on to new dates and times. Please note that only the current appointment will be affected. All other appointments in the recurrence pattern will remain unchanged.
- **Show Weekends** – Check this option to display Saturday and Sunday on the calendar.
- **Schedule Slot Increments** – Select the time increments that should be used in the Day and Resource Day views. The less the increments, the more detail that is displayed, however, this also will increase the amount of scrolling required.
- **View Start Time Hour** – Enter the start time that is displayed on the calendar for the Day and Resource Day views. It is highly recommended that this be set to the earliest time that you schedule appointments for. Otherwise, the appointment may not show up in the calendar. The default is 8:00 AM, but can be changed if requested.
- **View End Time Hour** – Enter the end time that is displayed on the calendar for the Day and Resource Day views. It is highly recommended that this be set to the latest time that you schedule appointments for. Otherwise, the appointment may not show up in the calendar. The default is 6:00 PM, but can be changed if requested.

- **Display Canceled Appointments on Calendar** – Check this option if appointments with a status of Canceled should still be displayed on the calendar. If checked, the canceled appointments will be shown with a strikethrough on the text.
- **Day/Week View Group By Resources** – If checked appointments are grouped by assigned on the standard day and week views.
- **Display Time Zone Selector** – If checked, the time zone selector will be displayed on the calendar and on the new/edit appointment page.
- **Default Time Zone** – Only applicable if Display Time Zone Selector is checked. This is the default time zone that will be used to display the calendar and for new appointments. The user's current time zone is indicated by a * at the end. Please note that the time shown when viewing an appointment and/or session will always be based on the time zone from your user record, not the schedule settings.
- **Email Notification for New Appointments** – Check this option if an appointment notification email should be sent every time a new appointment is created where you are the Assigned To.
- **Email Notification for Changed Appointments** – Check this option if an appointment notification email should be sent every time an appointment is changed where you are the Assigned To. Specifically, if any of the following is changed a notification will be generated:
 - Start Date
 - Start Time
 - Duration
 - Status
 - Assigned To
- **Default Location** – Select the default location for new appointments. Note that the default location on the appointment type will override the user setting.

Code Groups

Code Groups are used to organize the diagnosis and procedure codes in TotalABA. Furthermore, code groups may be assigned to staff members to limit the codes that may be used by them. Go to the **Codes Setup** tab to access code groups. A code group consists of the following fields:

- **Name** – The unique name of the code group (e.g. Bachelor Degree Codes, Master Degree Codes).
- **Active** – Indicates if the code group is active. This means it may be selected and is enforced for code groups (staff member & student) on a session.
- **Allow All Modifiers** – Indicates if all modifiers may be used with any procedure code (default). If not checked, then each procedure/modifier combination that can be used must be selected (e.g. H0031, H0031-HN, H0031-HO).
- **Comments** – Enter any additional comments related to the code group.
- **Procedure Codes** – Select which procedure codes should be part of the code group.
- **Diagnosis Codes** – Select which diagnosis codes should be part of the code group. A selection is not required if all diagnosis codes in TotalABA may be used.

See staff member and student code groups for further information.

Codes Setup

The Codes Setup tab contains links to various record types used throughout TotalABA for coding purposes. This includes the following sections:

- Code Groups
- Diagnosis Codes
- Procedure Codes
- Modifier Codes

Contracts

A contract is assigned to a student for a given funding source and allows the practice to track who is responsible for the payment of services. A student may have multiple contracts/funding sources if applicable.

If your practice is integrated with LeonardoMD Renaissance, then contracts with a funding source of Insurance are automatically added and maintained from the Renaissance application and can only be viewed in TotalABA. Insurance coverages represent the student's current (and past) enrollments. They are automatically added and maintained from the Renaissance application. They can only be viewed in TotalABA.

Contracts consist of the following fields:

- **Student** – This is the student for the contract.
- **Funding Source** – The funding source used for the contact.
- **Active** - The contract will automatically be active if the termination date is blank, or has not happened yet. The contract will become inactive when the termination date has passed, and then it cannot be selected on new authorizations or sessions.
- **Responsibility** - This is used to track if this is the student's Primary, Secondary or Tertiary contract.
- **ID #** - This is the identification number assigned by the student's funding source.
- **Effective Date** - Indicates the date the student's contract went into effect here. This is for tracking purposed only and is not required for billing.
- **Termination Date** - The date that the student's contract expires. It controls if the contract is active or not. It is important to note that if a student's contract expires, future claims may be denied.
- **Contract on File** – Shows if a physical or digital version of the completed contract is on file.
- **Comments**

Credential Categories

Credential categories are used when creating staff member credentials. Examples of credential categories are:

- Certificates - Certificates for training or skills acquired.
- Clearances - Immunizations, processed clearance requests, etc.
- Degrees - Various degrees that a staff member may have obtained.
- Legal - Legal documents, licenses, approvals, etc.

Each credential category may have one or more credential types. If you would like the various credential types to print as part of the staff member name on sessions, select **Include for Staff Member Print**. Some examples of credential types for the Degrees category are:

- Associate
- Bachelor
- BCBA
- Masters
- MFT

Diagnoses

Diagnoses provide an ongoing list of diagnosis codes for the student along with a status, onset date and resolution date. Active diagnoses are automatically added as diagnosis codes on a new session for the student. Note: ICD-9 diagnoses will only be automatically added for sessions with a date of service prior to October 1, 2015 and ICD-10 diagnoses will only be automatically added for sessions with a date of service on/after October 1, 2015.

Diagnosis Codes

Diagnosis codes are used in authorizations, diagnoses and sessions in order to identify diseases, disorders, symptoms, etc. in a patient/student. Furthermore, they are used in a claim to bill the insurance.

If your practice is using MRC Billing, then this section is read-only as they will be entering in all applicable diagnosis codes for your practice. If additional codes are required or there are questions regarding the existing codes, please contact MRC.

Expense Categories

Expense categories are used when creating expense tracking records. They allow for various categorizations and reporting of the expense tracking records in the practice. The following fields are available on an expense category.

- **Active** – Check this option if the expense category is active. This means it may be selected for an expense tracking record.
- **Allow Mileage** – Indicates if the Beginning and Ending Odometer fields are available on the corresponding expense tracking record.
- **Billable Default** – Indicates if the Billable field on the corresponding expense tracking record is checked by default when the category is selected.
- **Level 1 Category** – Enter the name of the expense category (i.e. Supplies, Travel). If various levels of categorization are needed, make this top level category name.
- **Level 2 Category** – Enter the next level of categorization. This is not required. For example, Mileage (level 1 category of Travel).
- **Level 3 Category** – Enter the third level of categorization. This is not required.
- **Level 4 Category** – Enter the fourth level of categorization. This is not required.

Expense Tracking

Expense tracking records are created from an appointment. They are used to record various expenses occurred by the therapist and any other persons that are related to the appointment. These are not used to bill the insurance for the student's sessions. Various reports are available and more may be created to suit the practice's needs.

- **Assigned To** – This is user that is tracking their expenses and may be eligible for reimbursement. It defaults to the Assigned To on the appointment when the record is initially created, but it may be changed.
- **Expense Category** – Select the appropriate category for the expense.
- **Billable** – Check this option if the expense is billable. This is used by the practice for reporting purposes. It is checked by default if the corresponding expense category has Billable Default selected.
- **Beginning Odometer** – If the expense category allows mileage, this field will be enabled. If applicable enter the beginning odometer mileage related to the expense. If just the total mileage is needed, enter a value of 0 (the total mileage will be entered for the Ending Odometer).
- **Ending Odometer** – If the expense category allows mileage, this field will be enabled. If applicable enter the ending odometer mileage related to the expense. If just the total mileage is needed, enter that value here (0 should be entered for the Beginning Odometer).
- **Amount** – Enter the total amount of the expense.
- **Comments** – Enter any additional details/information related to the expense if needed.

Funding Sources

A funding source is essentially the entity that will be paying for a student's therapy and may be any one of the following: Insurance, Educational Institution, Regional Center, Private Pay or Other. It contains

the source's information and is used by associated contracts. This allows TotalABA to support the various payers your practice does business with.

If your practice is integrated with LeonardoMD Renaissance, then funding types of Insurance are automatically added and maintained from the Renaissance application and can only be viewed in TotalABA.

Funding sources consist of the following fields:

- **Name**
- **Active** - Check this option if the funding source is active. This means it may be selected on a contract, student, session, etc.
- **Funding Type** – Indicates the type of entity responsible for payment. It may be any of the following: Insurance, Educational Institution, Regional Center, Private Pay or Other.
- **Send Billing Message** - Determines if Send Billing Message is checked by default on a new session if the funding source is used. This is only applicable to organizations that are integrated with Renaissance.
- **Batch Sessions on Sign-Off** - Indicates if multiple sessions for the same student & date of service should be combined into a single superbill for the funding source. This means that these sessions must all be signed off at once. Please see Sessions / Signing-Off for further details.
- **Comments** - Enter any additional details/information related to the funding source if needed.

Allowable Procedures

Allowable procedures determine which procedure(s) may be selected in an authorization or session for the given student/contract. This is a good way to ensure that only valid procedures are used for the authorization, session and resulting billing message. This will only be restricted in sessions where the corresponding appointment has an authorization. If the funding source does not have any allowable procedures, then all procedures may be selected.

Home

The home page will display the next seven days of upcoming appointments for the user.

Furthermore, it also shows tasks that have been assigned to the current user (My Tasks). New tasks may be created from here as well. The drop-down list on the right side of the tasks section allows for different filtering criteria on which tasks are displayed:

- **Overdue** - Only displays overdue tasks (due date is prior to the current date).
- **Today** - Only displays tasks that are due on the current date.
- **Today + Overdue** - Only displays tasks that are due on the current date or are overdue.
- **Tomorrow** - Only displays tasks that are due tomorrow.
- **Next 7 Days** - Only displays tasks that are due over the next seven days (this includes the current date).

- Next 7 Days + Overdue - Only displays tasks that are due over the next seven days or are overdue.
- This Month - Only displays task that are due in the current month.
- All Open - Displays all open tasks (status is not completed).

Locations

Locations are used by appointments to determine the place of service. Locations are also selected for student and staff member locations.

If your practice is integrated with LeonardoMD Renaissance, then the location is automatically sent over in a billing message when a corresponding session is signed-off. They are automatically added and maintained from the Renaissance application and may only be viewed in TotalABA.

Modifier Codes

Modifier codes are used in sessions in order to indicate that a procedure that has been performed has been altered but has not changed in its definition. This is then used in a claim to bill the insurance.

If your practice is using MRC Billing, then this section is read-only as they will be entering in all applicable modifier codes for your practice. If additional codes are required or there are questions regarding the existing codes, please contact MRC.

Procedure Codes

Procedure codes are used in authorizations and sessions to identify specific medical, surgical and diagnostic services. This may then be used in a claim/invoice to bill the payer (e.g. insurance, regional center, family, etc.). The fields on the procedure code are:

- **Code** – This is the actual code that is selected in TotalABA and sent in billing messages from a session. Examples of CPT codes include: 96151, 0360T, etc.
- **Active** – Indicates if the procedure code is active in TotalABA. If it is active, it means it may be selected on an authorization, in a session, etc.
- **Code Type** – Indicates the type of procedure code. CPT codes are used by insurance, if your practice utilizes MRC then CPT codes may only be maintained by them.
- **Treatment Type** – May be used to help categorize the various procedure codes in your site.
- **Modifier** - If a modifier code should always be associated to the procedure code when selected on a session, select the modifier here.
- **Description** – This is the explanation of the code.
- **Minutes per Unit** – Used to indicate the number of minutes required to automatically calculate a unit for the procedure. For example, if the minutes per unit are 15 and the duration is 45 minutes, then 3 units are calculated. See the Rounding Method field for further details on how units are calculated when the minutes per unit are not evenly divisible by the duration.

- **Maximum Duration** - If a value is entered then this indicates the maximum number of minutes that may be applied to the procedure on the session. Any additional minutes must be applied to other procedures. This only is used when the minutes per unit on the procedure also has a value.
- **Units per Visit** - Used to indicate the number of units that should always be used for the procedure code on a session, regardless of the time spent for that procedure. This must be 0 if minute per unit has a value greater than 0.
- **Maximum Units per Day** - Indicates the maximum # of units that may be signed-off on sessions for a given day for the student. If the maximum is exceeded, then you will not be able to sign-off on the session(s).
- **Rounding Method** – This determines how units are calculated for the procedure when the minutes per unit field has a value and the duration would result in a fractional value. The options are listed below.
 - **Full Units, Rounded Down** – The procedure code will always have a whole number for the units. Any fractions that result from the duration divided by the minutes per unit will be rounded down. For example:
 - If the minutes per unit is 15 and the duration is 15 - 29 minutes, then 1 unit is calculated.
 - If the duration is 30 – 44 minutes, then 2 units are calculated.
 - If the duration is less than the minutes per unit, then 0 units are calculated.
 - **Full Units, Greater Than 50%** - The procedure code will always have a whole number for the units. Any fractions that result from the duration divided by the minutes per unit will be rounded up or down depending on if the fraction is greater than 0.5. For example:
 - If the minutes per unit is 30 and the duration is 16 - 29 minutes, then 1 unit is calculated.
 - If the duration is 31 – 45 minutes, then 1 unit is still calculated. If the duration is 46 – 60 minutes, then 2 units are calculated.
 - If the duration is less or equal to half the minutes per unit, then 0 units are calculated (e.g. 15 minutes or less in the current example).
 - **Full Units, Rounded Up** – The procedure code will always have a whole number for the units. Any fractions that result from the duration divided by the minutes per unit will be rounded up. For example:
 - If the minutes per unit is 15 and the duration is 1 - 15 minutes, then 1 unit is calculated.
 - If the duration is 16 - 30 minutes, then 2 units are calculated.
 - If the duration is 0, then 0 units are calculated.
 - **Partial Units, Round Down** – This option allows for fractional units for the procedure on the session. It is only allowed when the minutes per unit are either 30 or 60. If 30 minutes per unit is used, then half units are calculated (e.g. 0.5, 1, 1.5, etc.). If 60

minutes per unit is used, then quarter units are calculated (e.g. 0.25, 0.5, 0.75, 1, 1.25, etc.). Some examples:

- If the minutes per unit is 30 and the duration is 0 - 14 minutes, then 0 units are calculated.
 - If the minutes per unit is 30 and the duration is 15 - 29 minutes, then 0.5 units are calculated.
 - If the minutes per unit is 60 and the duration is 0 - 14 minutes, then 0 units are calculated.
 - If the minutes per unit is 60 and the duration is 15 - 29 minutes, then 0.25 units are calculated.
 - If the minutes per unit is 60 and the duration is 30 - 44 minutes, then 0.5 units are calculated.
 - If the minutes per unit is 60 and the duration is 45 - 59 minutes, then 0.75 units are calculated.
- **Secondary Code** – The secondary code is used to automatically set a second procedure code when the primary code is selected. For example, on procedure 0360T the secondary code should be 0361T. When 0360T is selected on a session, then 0361T is automatically added as a procedure to that session as well. The primary procedure code automatically will have duration up the maximum duration. The secondary code will receive the remaining billable minutes from the session.

If your practice is using MRC Billing, then they will maintain the list of all applicable CPT (insurance) procedure codes in the practice. If additional codes are required or there are questions regarding the existing codes, please contact MRC.

Reports

Reports allow the practice to analyze the data stored within TotalABA. Many commonly requested reports have already been created by Inviscid. Essentially, if the data is available in TotalABA, it may be used in a report. See the help provided by Salesforce for details on how to use and create reports. You can also contact us to help you create any reports you require.

Another option for display and filtering data is by creating views. This is done by the Create New View link at the top of each list for most tabs in TotalABA. You are restricted to displaying/filtering data only for that record type, but it is a quick and simple option.

Sessions

Sessions are used to record information for an appointment that will be used for documentation and billing purposes. A new session is created from an existing appointment. Typically, an appointment only has one session; however, there may be instances where more than one session is required (e.g. the need to bill out multiple procedure codes).

Once a session has been created and the therapist believes it should be passed onto a BCBA or administrator, the status should be changed to Ready for Review. The BCBA and/or administrators in the practice should periodically run a report or check a “Ready for Review” list in Sessions to see what requires their attention.

While reviewing a session, if everything looks correct, the user can proceed to the next step which is signing off on the session. However, if the information is unfinished or missing, change the status of the session to Incomplete. This will automatically create a task for the therapist listed on the session. It is also recommended that the Administration Comments be filled out explaining what still needs to be done.

Once a session has been signed off, the following occurs. Only users that have the Session Sign-Off permission can perform this action.

1. The status of the session is changed to Completed.
2. The session may no longer be modified. However, Notes & Attachments may still be created.
3. Assuming Send Billing Message is checked, the information is automatically sent to LeonardoMD Renaissance and a superbill is created in order to generate a claim to the insurance company.

See the sessions training videos at <http://www.inviscidsoftware.com/trainingVideos.aspx> for further information. The fields in the clinical information section of the session (activity, progress and impressions) may be customized for your practice. Please contact us for further details. Below are the fields on the session.

- **Session Date** – This corresponds to the date of the appointment and cannot be changed.
- **Time In** – This will default to the Start Time on the appointment, but it may be changed if necessary.
- **Time Out** – This will default to the End Time on the appointment (Start Time plus Duration), but it may be changed if necessary. The combination of Time In plus Time Out directly affects the number of Billable Minutes and Units on the session.
- **Billable Minutes** – This field is calculated based on the duration between the Time In/Out and the number of Non-Billable Minutes (duration of time in/out minus number of non-billable minutes). It used to calculate the number of Units for procedures with a Minutes per Unit value.
- **Non-Billable Minutes** – This is used to define how many minutes of the session should not be billed. It will default to zero for new sessions. Changing this value will update the number of Billable Minutes. For example, if a session was for an hour, but the student slept through 15 minutes of that session, you may want to set the non-billable minutes to 15. This will make the Billable Minutes equal to 45.
- **Therapist** – This is the therapist assigned to the session and defaults to the Assigned To from the appointment.
- **Activity** – This is the intervention method used on the session and may be required to sign-off on a session depending on your practice settings.

- **Progress** – This is the observation and monitor results. It may be required to sign-off on a session depending on your practice settings.
- **Impressions** – This is the explanation and recommendations. It may be required to sign-off on a session depending on your practice settings.
- **Therapist Comments** – This should be used by the therapist to add any pertinent comments regarding the session.
- **Administration Comments** – This should be used by the BCBA/administrator to add any necessary comments regarding the session. It is commonly used to explain why a session status was changed to Incomplete.
- **Non-Billable** – If checked, indicates that the session should not be billed or sent to the insurance. This allows the practice to record documentation for the student even though the time spent is not billable (e.g. the student was sleeping for the entire session). However, the session may still be signed-off. If a session is flagged as non-billable then the following will occur.
 - The Non-Billable Minutes are set to the session duration and the Billable Minutes are set to zero.
 - Send Billing Message is unchecked and disabled. This means the session will never be sent to the billing company.
 - A procedure code and units are not required to sign-off on the session.
 - The Funding Type and Contract are not required to sign-off on the session.
 - The Billing Provider is not required to sign-off on the session.
 - A Diagnosis Code is not required to sign-off on the session.
 - Non-Billable sessions will not be linked to other sessions during sign-off
- **Funding Type** – This represents the type of entity that will be paying for the student’s session. If the funding type is changed, then the contract is cleared. The funding type is initially set on a new session based on the following priority:
 - If a contract is selected, then the funding type (and source) is automatically derived from the contract.
 - If a Default Funding Type is selected on the student record, then it is used on the session.
 - Set to Insurance if the student has one or more active contracts with an insurance funding source.
- **Contract** – This represents the contract the practice has with the funding source for the student to pay for the session. If your practice is integrated with LeonardoMD Renaissance and the funding type is set to insurance, then a contract cannot be selected and will be left blank (this will be handled in Renaissance). Otherwise, make the selection from the available, active contracts. The contract is initially set on a new session based on the following priority:
 - If the associated appointment has an authorization, then the contract from that authorization is used.
 - If a Default Contract is selected on the student record, then it is used on the session.
 - If the student only has one active contract, then this contract is used on the session.

- **Send Billing Message** – This only applies to practices that are integrated with LeonardoMD Renaissance. If checked, the session will be automatically sent to Renaissance in order to bill the insurance once a session is completed. It should be unchecked for funding sources other than insurance or if the insurance should not be automatically billed. If a contract is selected, then value from Send Billing Message on the corresponding funding source will be used.
- **Status** – This indicates the current status of the session. All new sessions are set to In Progress. The therapist should set it to Ready for Review when it should be passed onto a BCBA/administrator. It should be set to Incomplete if information is missing or unfinished. It is automatically set to Complete once the session has been signed-off.
- **Billing Message Status** – This only applies to practices integrated with LeonardoMD Renaissance. This indicates the current state of the automatic billing message that is sent to Renaissance. Once it has been completed, it will be automatically set to Generated.
- **Billing Provider** – Select the billing provider that should be used on the session and submitted to the insurance. Only associated people that are flagged as a Billing Provider will be listed as a valid option. If the billing provider is set on the student record, then this field will automatically default to that value when the session is created. It is required to sign-off on a session. If your practices uses MRC, then they will be responsible for maintaining the list of billing providers
- **Sign-Off User** – This is the name of the user that signed-off on the session and is read-only.
- **Sign-Off Date** – This is the date/time when the session was signed-off and is read-only.
- **Superbill** – Once a session has been signed-off, a link to the resulting superbill will be displayed. Please see the Session Sign-Off and Superbills section below for further details
- **Diagnosis Code 1** – This is the primary diagnosis code for the session. If the student has diagnoses listed, then it will default to the first one. At least one diagnosis code is required to sign-off on a session. If the staff member record for the selected therapist has one or more code groups applied, then the session cannot be signed off unless the diagnosis code matches a code in the code group(s).
- **Diagnosis Code 2** – If necessary, select the second diagnosis code for the session.
- **Diagnosis Code 3** – If necessary, select the third diagnosis code for the session.
- **Diagnosis Code 4** – If necessary, select the fourth diagnosis code for the session.
- **Auto-Calculate Units/Duration** - If checked, the duration, units and unreimbursed minutes are all automatically calculated for each procedure based on the billable minutes of the session and the settings for the procedure code. You may uncheck this field if you wish to manually enter the duration and units for each procedure.
- **Unreimbursed Minutes** - This indicates how many billable minutes from the session have not been used by the procedure(s) in the calculation of the units. This typically has a value if the procedure requires more minutes to calculate units than are available on the session. For example, if the procedure is for 30 minutes per unit and the session has 44 billable minutes, then 14 minutes may be unreimbursed. This exists at the session (total of all procedures) and the procedure level.

- **Procedures** – Click the Add New button to add a new procedure to the session. Once a procedure has been added it may be modified or deleted. The following fields exist for each procedure added to the session.
 - **Procedure Code** – This is a procedure that was used for the session and indicates to the funding source what service was rendered. If an authorization was selected on the appointment, then this value will default to the procedure code from the authorization. At least one procedure with more than 0 units is required to sign-off on a session. If the corresponding funding source for the selected contract has allowable procedures listed, then the session cannot be signed off unless a valid code is selected. If the staff member record for the selected therapist has one or more code groups applied, then the session cannot be signed off unless the procedure code matches a code in the code group(s).
 - **Modifier Code** – A modifier code may be selected if it is necessary to further explain or modify the procedure code.
 - **Duration** – This is the number of billable minutes that are applied to the procedure and may be used to calculate the number of units (if the procedure has a Minutes per Unit value). It is automatically calculated if Auto-Calculate Units/Duration is selected.
 - **Units** – This is the number of billing units for the procedure. If the selected procedure code has a value for Minutes per Unit, then the Billable Minutes on the session is used to calculate this value. For example, if the session is for 60 minutes (zero Non-Billable Minutes) and the minutes per unit has a value of 15, then the number of units will be automatically set to 4. If the procedure code has a value for Units per Visit, then this number is used regardless of the session duration. If the procedure code does not have a value for Minutes per Unit or Units per Visit, then the number of units must be manually entered in order to sign-off on the session.
 - **Unreimbursed Minutes** - This indicates how many billable minutes from the session have not been used by this procedure in the calculation of the units.

Clone Clinical Data

The clinical information on a new session may be cloned from a prior session. Simply click the **Clone Clinical Data** button at the top of the page (this is not available when modifying an existing session). The follow the steps below.

- Select the session to clone. The last 25 sessions will be listed with the date/time, appointment type and therapist.
- By default, all fields for the session type will be selected for cloning. You can deselect any fields that should not be cloned.
- Click the Clone button to copy the data to your new session.

Signing-Off

Signing-off on a session marks the status as completed. Furthermore, if Send Billing Message is checked, then the corresponding billing record will be automatically created in the billing system (separate software). Only authorized users are able to sign-off on a session.

If a student has multiple sessions for the same day, you may be required to sign-off on more than one at the same time. This is true if all of the criteria below are met. The sessions are then combined into a single superbill which combines all the data from the sessions and adds the units together for duplicate procedures.

- The funding type is Insurance or the funding source for the contract has Batch Sessions on Sign-Off selected
- Same student
- Same authorization # on the appointment (if an authorization exists)
- Same date of service (the time in and time out may be different)
- Same billing provider
- Same location (this is derived from the corresponding appointment)
- Same diagnosis code 1
- Session is not flagged as Non-Billable
- Send Billing Message is the same

The session sign-off screen lists the various sessions for the student on the given day. It indicates which sessions must be signed-off together along with warnings (e.g. procedure code does not match the code on the corresponding authorization), missing data and sessions that have been signed-off already. All sessions that are signed-off after the 1.97 release of TotalABA will have a corresponding superbill record.

Enhanced Session Sign-Offs

There are several different ways you can manage sessions requiring sign-off: either for a student, a list of sessions or a custom defined filter. The sign-off sessions page will list all applicable sessions along with basic validation checking if the session may be signed-off or not. If the session can potentially be signed-off a button will be displayed to the left of that session. Otherwise, the reason(s) it cannot be signed off will be listed in red text in the last column. Furthermore, an Edit button is also available to directly edit the session and then return to the list of sessions.

Clicking **Sign-Off** will open the standard sign-off page where additional validation will be performed, such as session linkage, procedure maximum units, etc.

Clicking **Quick Sign** will automatically attempt to sign-off the session with no additional user input required. However, if the session is linked to others or has any additional requirements/warnings, then the standard sign-off page will be displayed (same as clicking Sign-Off as described above).

A bulk sign-off option is also available. To use this option, select all sessions that should be signed off and then click the **Bulk Sign-Off** button at the top of the page. This will launch a new page showing how

many sessions have been selected along with how many sessions have been processed. **Leave this window open until the status is marked as Completed.** Once completed it will list the sessions that have been signed-off along with those that could not be signed-off using the bulk feature. Sessions that have any warnings, validation issues or are linked to other sessions cannot be signed-off in bulk. They will be listed as “Couldn’t sign-off”.

In all cases, once the session has been signed off, you will be returned to the session sign-offs page and that session will be automatically removed from the list.

This page can be accessed in several different ways.

- Open a sessions list (must click Go next to the view name) and click the **Sign-Off** button. This will list all sessions that have not been signed off (default filter applied). You can also select individual sessions from the list using the checkboxes to the left of each session (or click the top checkbox to select all).
- Open the student record, go to the sessions section and click the **Sign-Off** button. This will list all sessions for the student that have not been signed off. You can also select individual sessions for the student using the checkboxes to the left of each session.

Once the sign-off sessions page has loaded, you have several options for managing it.

- Enter the search criteria using the available filter fields. Once you have set the filter, click the **Load Sessions** button. You can make this the default filter for future use by click the **Save As Default** button.
- If you selected records from session/student list, you can start a new search by clicking the **Remove Selection** button and then enter a new filter. The filter will automatically be set to your default filter (assuming one was saved) and you can load the sessions or alter the filter.
- You can remove the current filters by clicking **Clear Filters** and then add a new search criteria.

Bulk Session Sign-Off

Session Approvals

Session approvals allow the capture of a family member and/or therapist signature on the session. This is typically used to signal that the entity has approved the encounter and its content before the session has been signed off. Once the session has been signed off, session approvals may no longer be added.

The new session approval screen has a space where the signature may be made using a touch screen (e.g. tablet, cell phone, touch monitor) or with a mouse. Select the approval type (student representative or therapist), type in the name of the person making the signature and finally have them sign the page.

By default, only practice administrators have access to create and view session approvals. By default, only the practice administrators have access to session approvals. If you would like other users to have access, please contact us.

Session Deletion

A session may be deleted if the session has not been signed-off and the user has delete access. Clicking the Delete button the session will load the session deletion page that lists out all the related records that also be deleted when the session is removed. This includes: time tracking records, session approval signatures and lessons/lesson observations.

Print Clinical Document

The Print Clinical Document button on the view session page will generate a PDF file of the session. It will automatically include the following information:

- Practice Logo if available. See Sidebar / Settings / Practice Admin Settings for further information.
- Therapist
- Billing Provider
- Time In
- Time Out
- Appointment Type if setting is checked. See Sidebar / Settings / Practice Admin Settings for further information.
- Any fields in the Clinical Information section that have data entered (blank fields will not be included).
- Session approval signatures if setting(s) are checked. See the Sidebar / Settings / Practice Admin Settings for further information.
- Session sign-off information if the session has been completed.
- Image for the signature of the user that signed-off on the session if available. See the General Information section in Sidebar / Settings for further information.

Print Multiple Clinical Documents

The ability to print the clinical document for either a student, a list of sessions or a custom defined filter has been added to TotalABA. This feature can be accessed in several different ways.

- Open a sessions list (must click Go next to the view name) and click the **Print Clinical Information** button. This will list all sessions for the default filter criteria. You can also select individual sessions from the list using the checkboxes to the left of each session (or click the top checkbox to select all). Selecting the sessions from the list will automatically print the clinical information for those sessions.
- Open the student record, go to the sessions section and click the **Print Clinical Information** button. This will list all sessions for the student where you can apply additional filter criteria if needed. You can also select individual sessions for the student using the checkboxes to the left

of each session. Selecting the sessions before clicking the button will automatically print the clinical information for those sessions

Once the print multiple sessions page has loaded, you have several options for managing it.

- Enter the search criteria using the available filter fields. Once you have set the filter, click the **Load Sessions** button. You can make this the default filter for future use by click the **Save As Default** button.
- You can remove the current filters by clicking **Clear Filters** and then add a new search criteria.
- **Print Consolidated PDF** option - If checked and all sessions that are being printed are for a single student, then the header information is only printed on the first page and there is not a new page for each session. This is useful to save paper when printing out sessions for the student. See Sidebar / Settings / Practice Admin Settings to set the default for this option.

Staff Members

Staff Members allow your practice to track your employees/contractors along with their credentials, current & prior engagements and filtering criteria for the schedule views on the calendar. A staff member record is automatically created for each existing TotalABA user. Furthermore, all billing providers must be staff members. By default, only users in the Administrator security group are able to view, create and modify the staff member information. All other users only have access to the staff member name and if the staff member is a billing provider. Please contact us if you would like any changes to this security model.

While most of the fields on the staff member record are self-explanatory, there are several that warrant a more detailed explanation.

- **User** – If the staff member is also a TotalABA user, then this field will be populated with the user name.
- **Billing Provider** – If checked, then the staff member may be used as a billing provider on the student and session. If your practice uses MRC Billing, then they will setup the billing providers in your practice and this field will be read-only.
- **All Locations** – If checked, then the staff member is able to be associated to any location in the schedule views and filtering on the staff member location does not remove the staff member for the calendar. If unchecked, then only those staff member locations that are entered are used when filtering the schedule view by staff member location for the user.
- **All Appointment Types** - If checked, then the staff member is able to be associated to any appointment type in the schedule views and filtering on the staff member appointment type does not remove the staff member for the calendar. If unchecked, then only those staff member appointment types that are entered are used when filtering the schedule view by staff member appointment type for the user.
- **All Credentials** – If checked, then the staff member is able to be associated to any credential in the schedule views and filtering on the staff member credential does not remove the staff

member for the calendar. If unchecked, then only those staff member credentials that are entered are used when filtering the schedule view by staff member credential for the user.

Staff Member Engagements

Staff member engagements are used to track active, past and future activities for the staff member in your practice.

Credentials

Credentials are used to track the various qualifications, certificates, etc. that your staff members have achieved. The credential categories and types must be setup by your practice in order to use this section. Furthermore, they may be used to filter the users in the calendar based on the schedule views. However, the All Credentials field on the staff member record must be unchecked in order for the filtering to take effect.

Staff Member Locations

Staff member locations are used to filter the users in the calendar based on the schedule views. However, the All Locations field on the staff member record must be unchecked in order for the filtering to take effect. Note that this does *not* affect the location that may be selected on an appointment.

Staff Member Appointment Types

Staff member appointment types are used to filter the users in the calendar based on the schedule views. However, the All Appointment Types field on the staff member record must be unchecked in order for the filtering to take effect. Note that this does *not* affect the appointment type that may be selected on an appointment.

Staff Member Code Groups

Staff member code groups are used to restrict which diagnosis and/or procedure codes may be used on a session when the staff member is listed as the therapist. If one or more active code groups are associated to the staff member, then only those codes in the code group(s) are available in the diagnosis and procedure code pickers on the session. The following fields are available on the staff member code group:

- **Code Group** – Select the appropriate code group for the staff member.
- **Start Date** – If applicable enter the date the code group restriction should start. Only sessions with a date of service on/after the start date will have the code group applied. Leave blank if the code group should apply regardless of the date.
- **End Date** - If applicable enter the date the code group restriction should end. Only sessions with a date of service on/before the end date will have the code group applied. Leave blank if the code group should apply regardless of the date.
- **Comments** – Enter any notes for the staff member code group.

If the staff member does not have any associated code groups, then all diagnosis and procedure codes are valid when the staff member is the therapist on a session (within the scope of any other session constraints). See code groups and student code groups for further information.

Students

Students (may also be known as patients) are the central point for almost everything else in the TotalABA application. The student record contains standard name/address information along with other personal information such as date of birth, gender, social security #, etc. Furthermore, it contains a section for people related to a student such as emergency contacts and authorized pickup persons.

If your practice is integrated with LeonardoMD Renaissance, then select student information is synchronized with the billing application. This means that students created in Renaissance will be automatically added to TotalABA and vice-versa. See Appendix A for further details.

Select the Billing Provider on the student record if you would like that billing provider to be the default value on all new sessions for that student. This should be used if only one provider is ever used for insurance billing purposes.

The Default Funding Type and Default Contract may be selected on the student record. This helps determine what funding type, funding source and contract is used on a new session.

Inactive students cannot have associated records created for them.

Associated records are also available on the student record. This means that the record has a direct link to the student. The associated record types are:

- Open Activities
- Notes & Attachments
- Appointments
- Authorizations
- Insurance Coverages
- Problems
- Sessions

See the students training videos at <http://www.inviscidsoftware.com/trainingVideos.aspx> for further information.

Student Calendar

When viewing a student, click on the Student Calendar button to show the scheduled appointments for the student in the Day, Week or Month calendar. Below the calendar for the student is the Resource Day, Week, Month calendar for the selected users (available schedules). This will help identify which therapists have available time for new student appointments.

You can make the student calendar take up the entire screen by clicking the **full screen** button at the top of the calendar. You can still scroll down to view the resource calendar below it. When in full screen mode, click the **half screen** button to return to the split screen calendar.

See the Calendar tab for further information.

Time Sheet

When viewing a student, click on the Time Sheet button to show all Time Tracking entries associated to appointments for the student along with a grand total of time for the given report criteria.

Assigned Therapists

Enter the therapists assigned to the student. If your practice is using record level security, then the assigned therapist is able to access the student's record and all related records for that student (e.g. appointments, sessions, authorizations, treatment plans, etc.).

Assigned therapists are highlighted in red with an asterisk in the Resource views of the Student Calendar. This is helpful in determining which therapists should be assigned to new appointments for the student when applicable.

Student Locations

This allows your practice to associate a student to one more locations. This may be helpful for reporting purposes. Your practice may elect to limit the location on a student appointment to the selected student locations. This restriction only applies if this setting is enabled in your site and if the student has one or more student locations entered.

If your practice is using record level security, then access the student's record and all related records for that student (e.g. appointments, sessions, authorizations, treatment plans, etc.) may also be controlled by comparing the student locations to the staff member locations. If the staff member and the student share one more locations, then the staff member will have access to the student's record and all related records. This level of record level security must be enabled by your practice.

Student Code Groups

Student code groups are used to restrict which diagnosis and/or procedure codes may be used on a session for the student. If one or more active code groups are associated to the student, then only those codes in the code group(s) are available in the diagnosis and procedure code pickers on the session. The following fields are available on the student code group:

- **Code Group** – Select the appropriate code group for the student.
- **Start Date** – If applicable enter the date the code group restriction should start. Only sessions with a date of service on/after the start date will have the code group applied. Leave blank if the code group should apply regardless of the date.
- **End Date** - If applicable enter the date the code group restriction should end. Only sessions with a date of service on/before the end date will have the code group applied. Leave blank if the code group should apply regardless of the date.

- **Comments** – Enter any notes for the student code group.

If the student does not have any associated code groups, then all diagnosis and procedure codes are valid for that student on a session (within the scope of any other session constraints). See code groups and staff member code groups for further information.

Superbills

A superbill is the data from the session(s) after they have been signed-off for billing purposes. It is read-only and displays all the billing related data along with which sessions were part of the superbill. It may be the result of a single session or multiple sessions that were linked together during sign-off.

Tasks

The current user's tasks are listed on the Home tab. Furthermore, they may be notified of new tasks via email and reminder popups may be displayed while logged into TotalABA. A task consists of the following fields:

- **Assigned To** – This will default to the current user when a new task is created. It may be reassigned to another user by clicking the lookup icon to the right of the field.
- **Related To** – If applicable, select the type of record the task is related to. Once selected, choose the record it applies to as well. The task will display on the given record under Open Activities.
- **Subject** – You can enter a subject or choose from a default value. If you would like additional default values for the subject, please contact us with your request.
- **Due Date** – Select/enter a due date for the task.
- **Comments** – Enter any additional comments, details, etc. for the task.
- **Status** – Select the status of the task from the available options. All new tasks default to Not Started. Once the task is finished, change the status to Completed.
- **Priority** – Select the priority of the task, the default is Normal.
- **Send Notification Email?** – If checked, an email will be sent to the Assigned To user notifying them that they have a new task in TotalABA. However, this email will not contain any details in order to remain HIPAA compliant.
- **Reminder** – If reminder is selected, then once the reminder date/time has passed, the user will receive a pop-up window showing the task information with options to view the task, dismiss or snooze the reminder for a set amount of time.

Time Categories

Time categories are used when creating Time Tracking records. They allow for various categorizations and reporting of the time tracking records in the practice. The following fields are available on a time category.

- **Active** – Check this option if the time category is active. This means it may be selected for a time tracking record.
- **Billable Default** – Indicates if the Billable/Reimbursable field on the corresponding time tracking record is checked by default when the category is selected.
- **Level 1 Category** – Enter the name of the time category (i.e. Documentation, Face to Face). If various levels of categorization are needed, make this top level category name.
- **Level 2 Category** – Enter the next level of categorization. This is not required. For example, Vacation or Sick (level 1 category of Time Off).
- **Level 3 Category** – Enter the third level of categorization. This is not required.
- **Level 4 Category** – Enter the fourth level of categorization. This is not required.

Time Tracking

Time tracking records are created from an appointment. They are used to record the amount of time spent on activities related to the appointment. These are not used to bill the insurance for the student's sessions. Various reports are available and more may be created to suit the practice's needs.

Furthermore, time tracking records may be created from the sessions on an on appointment. If the time tracking record is created from the session, then the Synch Method field is also available. Your practice may elect to have a time tracking record automatically created for each new session. Please contact us to set this up if desired.

- **Assigned To** – This is user that is tracking their time. It defaults to the Assigned To on the appointment when the record is initially created, but it may be changed.
- **Synch Method** – If the time tracking record is created from a session, then this field is available and has the following options.
 - None – Synchronization does not exist between the time tracking record and the session. This means the user can enter the Start Time, End Time and Duration.
 - From Session, Total Minutes – This option will automatically set the Start Time, End Time and Duration of the time tracking record to be same values as the session. The duration is based on the sum of the billable and non-billable minutes on the session. If the session is changed, then the time tracking record will be automatically changed as well.
 - From Session, Billable Minutes - This option will automatically set the Start Time, End Time and Duration of the time tracking record to be same values as the session. The duration is based only on the billable minutes on the session. If the session is changed, then the time tracking record will be automatically changed as well.
 - From Session, Non-Billable Minutes - This option will automatically set the Start Time, End Time and Duration of the time tracking record to be same values as the session. The duration is based only on the non-billable minutes on the session. If the session is changed, then the time tracking record will be automatically changed as well.
- **Time Category** – Select the appropriate category for the record.

- **Billable/Reimbursable** – This is used by the practice for reporting purposes. It should be checked if this time tracking event is to be reimbursed to the therapist. If unchecked, this item will not show up on the reimbursement report run by the administrator. It is checked by default if the corresponding time category has Billable Default selected.
- **Time Tracking Date** – This is inherited from the corresponding appointment. Select a different date if applicable.
- **Start Time** - Optional time value indicating when this time tracking event was initiated. Setting this value and the End Time will automatically set the value for the Duration. This value is read-only if the Synch Method is set to a value other than None.
- **End Time** - Optional time value indicating when this time tracking event was completed. Setting this value and the Start Time will automatically set the value for the Duration. This value is read-only if the Synch Method is set to a value other than None.
- **Duration (minutes)** – Enter the number of minutes spent on the activity. Alternatively, you can enter the start/ end times and the duration will be automatically calculated. This value is read-only if the Synch Method is set to a value other than None.
- **Comments** – Enter any additional details/information related to the activity if needed.

Appendix A – Student Synchronization Fields

The following fields are synchronized between the LeonardoMD Renaissance application and TotalABA.

If a field is not listed, that means that it is not synchronized and only exists in TotalABA.

- Active
- Prefix
- First Name
- Middle Name
- Last Name
- Date of Birth
- SSN
- Medical Record # (only synchs from Renaissance to TotalABA, changes made in TotalABA will not be synched back)
- Home Address
- Home Phone
- Business Phone
- Email (only synchs from Renaissance to TotalABA, changes made in TotalABA will not be synched back)
- Gender
- Race
- Primary Language
- Ethnicity
- Billing Provider (a Staff Member record will be created if needed)
- Referring Physician (an Associated Person record will be created if needed)
- Guarantor (an Associated Person record will be created if needed)