


















WebPT EMR + Therabill Integration | Best Practices

DOs

-  Verify accuracy of Insurance Settings in WebPT.
-  Ensure patient has correct insurance assigned to case before beginning any documentation.
-  Begin a new case when a patient has a change in insurance (including self pay).
-  Log all patient payments in WebPT upon collection
-  Enter a workers comp claim number in both the subscriber ID field and the claim/casualty ID field in WebPT.
-  Add all secondary insurances to WebPT and make sure it's selected in the WebPT patient case.
-  When adding a new provider, make sure their name and NPI are exactly the same in WebPT and Therabill.

DON'Ts

-  Start a new patient note before finalizing previous one.
-  Browse in multiple clinics in multiple browser tabs.
-  Rename therapist calendar, this breaks reporting.
-  Overwrite user profiles or patients. Always create a new profile.
-  Add new patients, insurances, or referring physicians into Therabill.
-  Use WebPT's Quick Add when adding a patient.
-  Edit patient demographics in Therabill.
-  Enter patient payments directly into Therabill.
-  Edit note/title of insurance cards in Therabill.
-  Turn authorization watch off in Therabill.

