

# BEST PRACTICES

## WebPT EMR + Therabill Integration



Verify accuracy of [insurance settings](#) in WebPT before beginning any documentation.

Ensure patient has correct insurance assigned to case ([see step 7](#)) before beginning any documentation.

Begin a new case ([see step 7](#)) when a patient has a change of insurance (including Self Pay).

Log all [patient payments](#) in WebPT upon collection.

Enter a worker's 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 ([see step 7](#)).

When adding a new provider, make sure their name & NPI are the exactly the same in WebPT and Therabill.



Don't start a new patient note before finalizing the previous one.

Don't browse in multiple clinics in multiple browser tabs.

Don't rename therapist calendars as this breaks reporting.

Don't overwrite user profiles or patients. Always create a new one.

Don't add new patients, insurances or referring physicians into Therabill

Don't use WebPT's Quick Add when adding a patient

Don't edit patient demographics in Therabill

Don't enter patient payments directly into Therabill

Don't edit note/title of insurance cards in Therabill

Don't turn auth watch off in Therabill