

Initial and Subsequent Set-up

1. To sign up and create your account with User ID and temporary password:
 - a. Call CarePaths at 800-357-1200 or
 - b. Go to www.blog.carepaths.com and click Contact, or
 - c. Go directly to https://erecord.carepaths.com/public/org_requirements/new to complete your application.
 - d. Allow several days to receive your User ID and temporary password.
 - e. Substituting your User ID for “practice code”, go to <https://practicecode.carepaths.com>, click Sign In. Enter User Name and Password, click Staff and sign in.
 - f. First sign-in: Click on the gear icon by your name (upper right corner), click Settings, and
 - i. change your password
 - ii. set up a security question
 - iii. ensure that your email address is correct.
 - iv. Click on Documents and check the box to prepopulate (each new document on your client will be pre-filled from the last).
2. Add a Staff Member (office manager, billing person, other clinical staff)
 - a. Click home, click Admin. Click Admin again, Click Membership. Click Staff, click Add New Staff.
 - b. After filling in what is applicable, click Create Staff (on the bottom).

Create
CarePaths
account

Add Staff
Member

- c. Continue with each applicable tab, always remembering to save.
3. Add Site (practice location)
 - a. Click home, click Admin. Click Admin again, Click Membership. Click Sites.
 - b. Click Add a New Site and fill it requested info. Save!
4. Set up Billing Codes
 - a. Click home, click Admin. Click Admin again, Click Accounting.
 - b. Click on Add New.
 - c. One at a time, select and complete form for each billing code you use, including fees. Include CPT codes, Late Cancel fees, Document preparation, etc.
5. Set up Billing Provider (insurance payee)
 - a. Click Home, click Claims, click Billing Providers
 - b. Click Add New Billing Provider and complete information.
 - c. At the bottom, click Map Clinical Staff to Billing Provider and select Staff member that is the same as Billing Provider.
6. Add 3rd Party Payers
 - a. Click Home, click Claims. Under Payer Settings, click Payers.
 - b. Click Add Payer for each payer with whom you do business and Save. If your payer is not on the drop down list, you must contact Carepaths and request its addition.

A blue rectangular button with a white border containing the text "Add Site" in white.A blue rectangular button with a white border containing the text "Billings codes and fees" in white.A blue rectangular button with a white border containing the text "Billing Provider" in white.A blue rectangular button with a white border containing the text "Payers" in white.

7. ERA (Electronic Remittance Advice) Enrollment

ERA

8. Add Documents

Documents

- a. Click on Admin, click on Clinical. Click on Add Document and choose AMHA Supernote 4 or whatever document version is current.
- b. One by one, add all other documents you will need (e.g. Miscellaneous Contact Note).
- c. Click on Patient Documents and follow the same procedure to add the documents that you want your clients to be able to access and fill out through their patient portal.
- d. Your custom documents can be added for a fee by contacting CarePaths.

9. Set up Schedule

Schedule
View

- a. Click on Home, click on Scheduling, click on Views.
- b. Click on Add new view.
- c. Select your desired view, default appointment length and grid time interval (choose 30 if you want to be able to see the entire week at once on a computer screen). Save!

10. Set up Appointment Types and link documents

Appointment
Types and
Linked
Documents

- a. Click on Home, click on Scheduling, click on Appointment Types.
- b. Click on Add New Appointment Type.

- c. Change the name field to a name you choose (e.g. Intake Assessment).
- d. Select a base type, choose a document form, choose a billing code, choose a color (for the calendar). Save!
- e. Do this for each type of appointment you provide.
- f. Optional: To block out times where appointments cannot be made, use Base Type “Open Appointment”. When calendaring this type, you may use the note feature to remind what purpose that time block serves.