



Exchanging and Synchronizing Data Between TheraScribe® and Therapist Helper™ Using the TheraSync Utility

**TheraScribe® Support: 800-762-2974
Therapist Helper Support™: 781-937-0080**

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Overview

The TheraSync utility is designed to synchronize the Therapist Helper™ and TheraScribe® (version 4.0 or higher) software applications and allow for seamless data exchange between the two. After some initial setup, TheraSync operates from a single ‘Synchronize’ button in TheraScribe®.

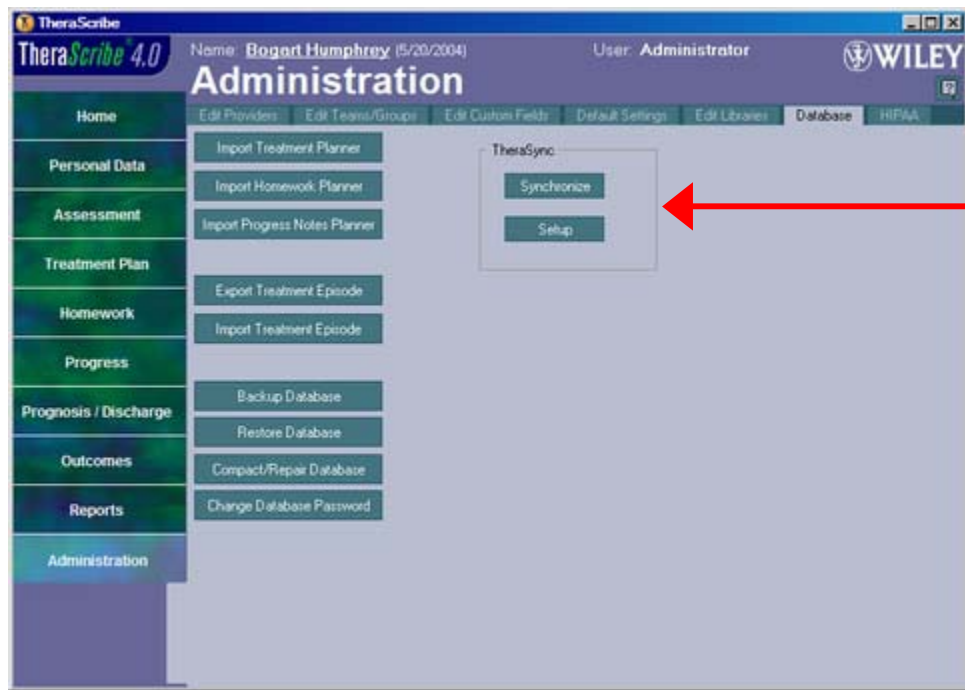
Most offices will probably want to synchronize at least once a week to ensure that any new patient and/or provider information is identical in both applications. Larger offices may need to synchronize more often.

Initial Setup

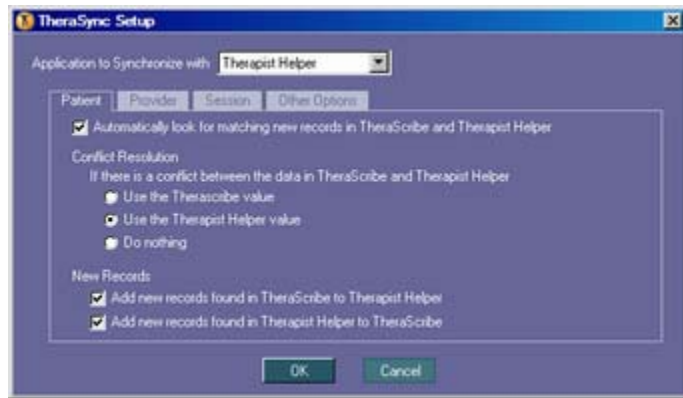
TheraSync synchronizes three sets of data between Therapist Helper™ and TheraScribe®: patients, providers, and sessions. Each one of these sets requires its own setup in order for TheraSync to know how to handle the data.

To setup TheraSync...

- 1 Open TheraScribe® and go to **Administration | Databases**. The Databases panel displays with two TheraSync buttons:



- 2 Click **Setup**. The TheraSync Setup dialog box displays:



- 3 From the **Application to Synchronize with** drop-down menu, select Therapist Helper™.
- 4 Complete the **Patient** panel based on the following values:
 - **Automatically look for matching new records in TheraScribe and Therapist Helper** – Check this box if you want TheraSync to match records based on patient name. For example, if TheraSync finds a patient named Smith, John in both Therapist Helper™ and TheraScribe®, it marks the patient as a match between the two applications. If you do not have this box checked, you must do the matching manually. We recommend that this option be left on; otherwise duplicate data may start appearing in Therapist Helper™ when synchronizing multiple times.
 - **Conflict Resolution** – If TheraSync finds mismatched data between matched records in Therapist Helper™ and TheraScribe®, you must decide how it will handle the resolution. Select one of three options:
 - Use TheraScribe Value** – Therapist Helper™ is overwritten with the data from TheraScribe®.
 - Use Therapist Helper Value** – TheraScribe® is overwritten with the data from Therapist Helper™.
 - Do Nothing** – TheraScribe® and Therapist Helper™ remain as they are—neither application is overwritten with data from the other.
 - **New Records** – If new records have been added to either application, you can select to transfer that new data to the other application. For example, if you add a new patient to Therapist Helper™, you can select **Add new records found in Therapist Helper to TheraScribe** to have that patient transferred to TheraScribe®, and vice versa.
- 5 Click the **Provider** tab and complete the identical fields for providers:
 - **Automatically look for matching new records in TheraScribe and Therapist Helper** – Check this box if you want TheraSync to match records based on provider name. For example, if TheraSync finds a provider named Smith, Jane in both Therapist Helper™ and TheraScribe®, it marks the provider as a match between the two applications. If you do not have this box checked, you must do the matching manually.

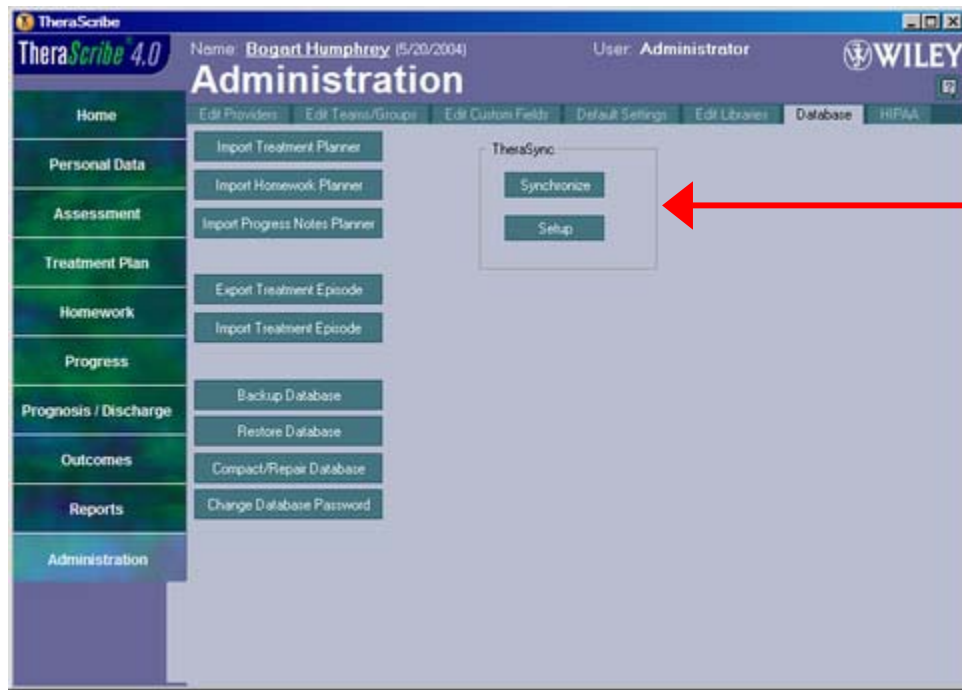
- **Conflict Resolution** – If TheraSync finds mismatched data between matched records in Therapist Helper™ and TheraScribe®, you must decide how it will handle the resolution. Select one of three options:
 - Use TheraScribe Value** – Therapist Helper™ is overwritten with the data from TheraScribe®
 - Use Therapist Helper Value** – TheraScribe® is overwritten with the data from Therapist Helper™.
 - Do Nothing** – TheraScribe® and Therapist Helper™ remain as they are—neither application is overwritten with data from the other.
 - **New Records** – If new records have been added to either application, you can select to transfer that new data to the **other** application. For example, if you add a new provider to Therapist Helper™, you can select **Add new records found in Therapist Helper to TheraScribe** to have that provider transferred to TheraScribe®, and vice versa.
- 6 Click the **Session** tab and complete the identical fields for sessions:
- **Automatically look for matching new records in TheraScribe and Therapist Helper** – This box is grayed out for sessions. TheraSync automatically looks for matches between sessions.
 - **Conflict Resolution** – If TheraSync finds mismatched data between matched records in Therapist Helper™ and TheraScribe®, you must decide how it will handle the resolution. Select one of three options:
 - Use TheraScribe Value** – Therapist Helper™ is overwritten with the data from TheraScribe®.
 - Use Therapist Helper Value** – TheraScribe® is overwritten with the data from Therapist Helper™.
 - Do Nothing** – TheraScribe® and Therapist Helper™ remain as they are—neither application is overwritten with data from the other.
 - **New Records** – If new records have been added to either application, you can select to transfer that new data to the **other** application. For example, if you add a new session to Therapist Helper™, you can select **Add new records found in Therapist Helper to TheraScribe** to have that session transferred to TheraScribe®, and vice versa.
- 7 Click the **Other Options** tab to enter miscellaneous setup items:
- Debug Mode - may be useful for troubleshooting problems.
 - Filter Sessions to those added since last Synchronization - allows you to exclude sessions that have already been processed. This can greatly reduce the time required to import data if there are many sessions to look at.
- 8 Click **OK**. The TheraSync setup is complete.

Running the Synchronization

Once you have TheraSync setup to handle the data sets between Therapist Helper™ and TheraScribe®, you are ready to run the synchronization. TheraSync first examines the data then matches like elements—either automatically or manually, depending on how you have it setup—before doing the final synchronization (or update).

To run TheraSync...

- 1 Open TheraScribe® and go to **Administration | Databases**. The Databases panel displays with two TheraSync buttons:



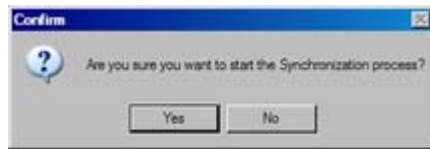
- 2 Click **Synchronize**. The Examining Data dialog box displays:



The Therapist Helper™ splash screen appears briefly, and then both disappear as the Synchronize Information panel displays:



- 3 If you need to do any matching or unmatching, click **Modify** next to any of the three update areas to change the synchronized information. (These steps are described in more detail below under *To match/unmatch records...*)
- 4 Click **Do Update** to finalize the synchronization. A confirmation box displays:



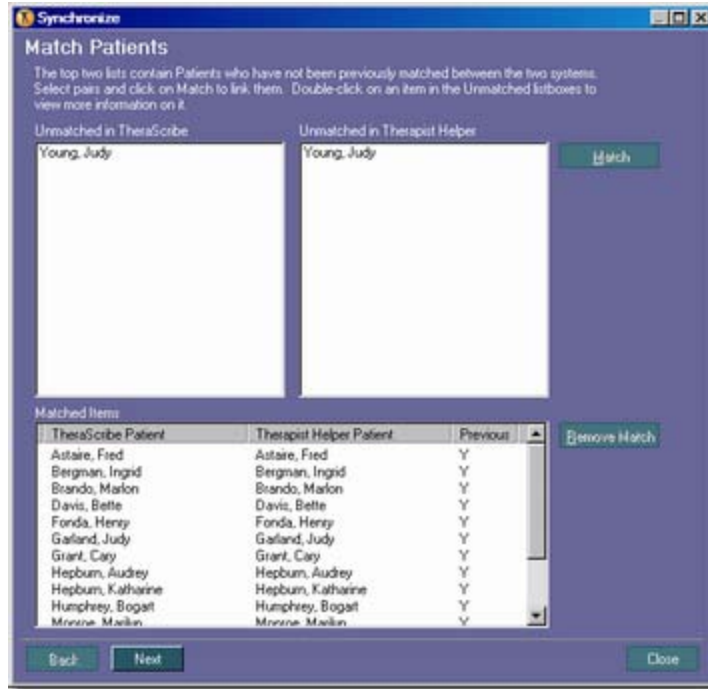
- 5 Click **Yes**. After a few moments a final confirmation displays:



- 6 Click **OK**. The synchronization is now complete.

To match/unmatch records...

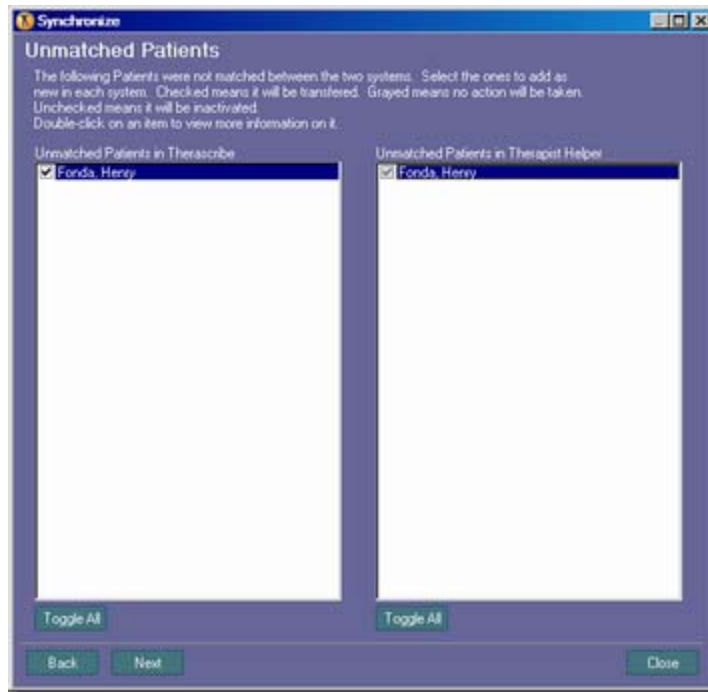
- 1 If you need to do any matching from the Synchronize Information panel, click **Modify** next to any of the three update areas. For example, if you prefer to match patients manually, you can uncheck the **Automatically look for matching new records in TheraScribe and Therapist Helper** box under the Patient setup tab, run the Synchronization process, and then go into the Modify panel:



- 2 Highlight a name in the **Unmatched in TheraScribe** box and in the **Unmatched in Therapist Helper** column and click **Match**. These records move to the **Matched Items** box and are now linked in TheraSync.
- 3 Likewise, highlight a line in the **Matched Items** section and click **Remove Match**. These records are split apart in TheraSync and move to the respective **Unmatched** columns.
- 4 You can double-click on an item in the Unmatched lists to view more detail on the item.

Note: If a new episode is created for a patient who has been previously synchronized, subsequent synchronizations will affect data on the original episode, not newer ones.

5 Click **Next**. The Unmatched Patients screen displays:



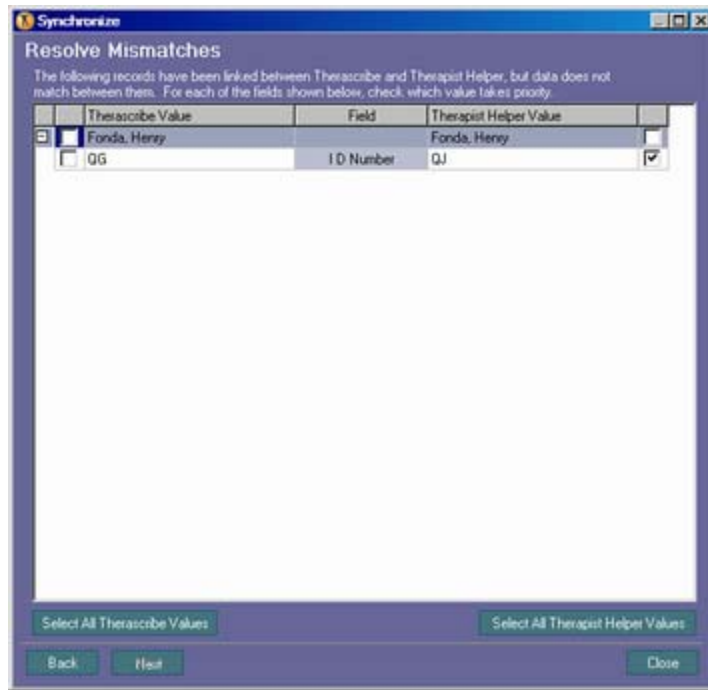
The term ‘Unmatched’ here means that the patient does not appear in the corresponding application. For example, if Henry Fonda appears in the Unmatched Patients in TheraScribe® column, it means that Henry Fonda is not appearing in Therapist Helper™. That particular patient is in an ‘Unmatched’ state in TheraScribe®. Double-click on an item here to view more detail.

6 Check the corresponding boxes according to the following definitions:

- **Checked** – The patient will be added as a new patient in the corresponding application.
- **Grayed** – No action will be taken for this patient. When you run the synchronization again, this patient will appear once more.
- **Unchecked** – The patient will be marked as inactive in the existing application (by design, neither application deletes patients).

Please note: If sessions are marked to be deleted from TheraScribe, they will, in fact, be deleted from the TheraScribe database. The system will not mark the sessions to be deleted. The user must do that.

- 7 Click **Next**. The Resolve Mismatches screen displays:



This screen shows the field-level detail of any outstanding mismatches, allowing you to select the precise information to copy over to the corresponding application. For example, if a patient's phone number shows an incorrect area code in Therapist Helper™, you can select the value in TheraScribe® to carry over to Therapist Helper™.

- 8 Check the boxes next to the values that you want to use in both systems, or click the **Select All** buttons to copy over all values for a particular application.
- 9 Click **Close** to close the screen and return to Synchronize Information window, where you can now perform similar matches for Providers and Sessions.

Technical Support

If you have TheraScribe-related questions, Technical Support Representatives may be contacted via phone by dialing (800) 762-2974 (United States Only). Hours of availability are 8:00AM to 8:00PM Eastern time, excluding weekends and holidays. International callers may use (317) 572-3994. If you have Therapist Helper questions, please call 1-781-937-0080 Monday through Friday 9:00AM to 5:00PM Eastern time. Depending on the issue you are encountering, you may be referred to the other product's support department.