

2023

# Progress Counseling Group

CLINICAL PARTNER GUIDE  
JANUARY '23

PROGRESS COUNSELING GROUP | 213 S. Dillard St #120B. Winter Garden, FL 34787

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## Clinical Partner Description

With our generous revenue share program full time clinicians can earn more than \$80K per year. To succeed as a Clinical Partner, you will be dedicated, hardworking, a true team player, and have a passion for delivering client growth.

### We Provide:

- Turn-Key Physical and Virtual Office
- Clinical Tools & Resources
- EHR Software
- Billing & Payment Processing
- Business Development Support
- Dedicated Partner Portal
- Detailed Compensation Tracking/Reporting
- Complete Credentialing Services

### Requirements:

- Master's Degree Required
- Maintain professional liability insurance with minimum \$1,000,000/\$2,000,000 limits
- Valid license to practice as a mental health provider in Florida
- Clinical supervisor if required
- Completion of required training curriculum

### Recommendations:

- Cash reserves totaling 4 months of required personal income
- Minimum \$1000 initial marketing budget
- Flexibility to work evenings and weekends

## Clinical Partner Program

Our clinical partner program is designed to provide the flexibility and individuality of private practice without the additional operational responsibilities. The goal is for clinicians to focus on client service and not business tasks.

### Technology

The use of technology to automate several processes enables us to provide this structure at relatively low-cost to the clinician. The main technology component we employ is Theraplatform. Clinicians are only required to enter new clients, schedule appointments, and create treatment plans/progress notes. All other client management tasks are completed within Theraplatform. Included in this guide are details of the required information clinicians need to know about our policies and procedures and the steps to complete the required tasks.

### Client Portal

All clients have a dedicated client portal with access to scheduling, billing, shared resources, and intake forms. Clients also attend virtual appointments using the secure and HIPPA compliant platform.

### Documentation

All client documentation is electronic. All clients are required to complete four electronic consent forms prior to service. Incomplete documentation is shown in the “To Do” alerts of Theraplatform.

### Resources

A library of shareable resources is available in Theraplatform. Clinicians can view, print, or share with client in virtual sessions or send to the client portal.

### Training

Ongoing Training opportunities are available via the Partner Portal. All Clinical Partners are required to complete and acknowledge all required training. Additionally, Clinical Partners are required to complete continuing education requirements to maintain state licensure(s). Theraplatform provides several training videos with the software. Assistance and technical support are available in Theraplatform.

### Website and Marketing

We maintain a “branding” website that highlights our practice and clinicians. Each clinician should provide a bio that details their area(s) or practice and relevant personal information. Clients can schedule online from the home page as well as several other pages within the site. This service is provided at no cost to the clinician.

### Supervision

Currently, we do not provide clinical supervision services. However, we have multiple colleagues that provide supervision services at reasonable rates.

## Building Your Business

### Third-Party Payers

Credentialing with multiple insurance providers is the most effective method of establishing a continuing client base. In addition to credentialing, we also recommend the following strategies. Currently, our organization is credentialed with the following companies

- A. Aetna
- B. Cigna
- C. Humana Military
- D. Magellan
- E. Medicare
- F. Optum/United Health Care and related companies
  - a. AARP Medicare Advantage
  - b. All Savers Insurance
  - c. Golden Rule
  - d. UMR

### Employee Assistance Providers (EAP)

Along with insurance providers several third-party companies provide EAP benefits. Currently, we work with the following companies:

- A. Aetna
- B. AllOne Health
- C. BHS
- D. Cigna
- E. Optum
- F. Life Works (Morneau Shepell)
- G. ENI

### Open-Path Network

Open-Path provides referrals for clients that do not have health insurance.

## Advertising and Marketing Services

### Website

Progress Counseling Group maintains progresscounselinggroup.com as the primary internet landing page. Additionally, Progress Counseling Group owns several domain names that direct internet traffic to the primary landing page. All clinical partners are provided with a directory listing and dedicated landing page at progresscounselinggroup.com/[providername]. Clinical partners may advertise, display, or promote the assigned individual landing page.

### Social Media

Progress Counseling Group maintains a professional social media presence on various platforms. Individual clinical partners may be referenced in postings. Clinical Partners may engage in social media marketing at their own expense. All brand references to Progress Counseling Group and its affiliates must include the approved Clinical Partner logo. Professional content management services are available for an additional cost.

### Google Business

Progress Counseling Group establishes and maintains a Google Business profile for each location and clinical partner. Maintenance includes updating of profile information as required. Professional content management services are available for an additional cost.

### Psychology Today

Progress Counseling Group maintains a profile to promote the practice that includes a profile picture and contact information for each clinical partner. Psychology today offers a professional listing along with a “virtual” phone number for a monthly fee.

### Pay Per Click Advertising (PPC)

Progress Counseling Group may include PPC advertising as part of its overall marketing strategy. PPC advertising is designed to generate visitors to progresscounselinggroup.com or specific landing pages. Where appropriate clinical partner profiles and contact information may be included.

### Directory listings

Multiple referral directories are available, many of these directories create profiles using available public information including licensing information. Progress Counseling Group maintains a profile on available directory listings. Progress Counseling Group does not pay for any directory listings and cannot guarantee the accuracy of information displayed.

## Communication Services

### Virtual Call Center

It is highly recommended that each partner maintains a dedicated client contact phone number. Progress Counseling Group provides live operator answering services during normal business hours for all clients that contact via Progress Counseling Group assigned phone numbers. The call center provides individualized message taking services where appropriate. All partners have access to the [message center](#) and will receive individualized message notifications via email.

### Message Center [Training Videos](#)

Additionally, partners have the option to direct client calls from their dedicated client contact phone number to the message center for a nominal monthly fee. The live operator service includes:

- Virtual Receptionist
- Message Taking
- Voicemail Services
- Email Notification
- Web-Based Inbox

### Accessing Message Inbox

1. Go To: <https://myanswerfirst.com>
  - Username: [info@progresscounselinggroup.com](mailto:info@progresscounselinggroup.com)
  - Password: Pcg34787!
2. Click on [INBOX]
3. Browse for Message # from Email Notification in list of messages.
4. Click on message to view details to view caller information.

### Email

All partners are provided a @progresscounselinggroup.com email. Partners are required to use this email address for all internal and external correspondence related to Progress Counseling Group and its clients. All partners must include the following email signature in all correspondence.

#### **Email and Documentation Signature**

[Provider Name]

Progress Counseling Group

[Provider Phone #]

[Provider Email]

CONFIDENTIALITY NOTICE: The contents of this email message and any attachments are confidential and intended solely for addressee. The information may also be legally privileged. This transmission is sent in trust, for the sole purpose of delivery to the intended recipient.

### [Access Webmail Email Portal](#)

Login using email address and password

Click [Open] to view inbox

Instructions for adding email account to mobile devices and computers are provided in the webmail portal

### Internet Access

WI-FI service is provided in each office at no charge. The network information is available in each office and via the [Partner Portal](#) (Login Required)

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## Office Space

Offices are fully furnished with limited decorative additions. Partners are encouraged to personalize the space to their liking.

The office space is available based on the set schedule of each partner. An online calendar is maintained with the reserve schedule for each partner.

The conference room is a shared resource with the entire building, a reservation schedule is available. Partners can reserve the space for up to four (4) at a time.

Each office space includes the following:

- Clinician Chair
- Client Couch
- End Table(s)
- Lighting
- Electrical Power Strip

**Partners are asked to maintain the furniture to the best of their ability. If furniture requires additional cleaning or replacement, please submit the [Online Form](#).**

## Reserve Office Space

Skedda is an online calendar that manages office space reservations. Partner accounts are created using your progresscounselinggroup.com email address.

[Access Skedda Calendar](#) or use link in Partner Portal

Click [Login]

Select {Date} and {Time} and {Office} to reserve

Double Click Start Time

Complete Online Form

Click [Confirm Booking]

## Partner Provided Resources

Several clinicians have purchased therapeutic aids and maintain these items within the office space. As professionals there is an expectation of respect for one another's belongings. These items are NOT to be used by other partners without permission from the purchasing clinician.

## Office Supplies

The following office supplies are provided at no charge to partner:

- Notepads
- Pens
- Tissues
- Cleaning Supplies
- Candy & Mints

Bottled water or similar beverages may be available for both partners and clients.

## Office Cleaning

Office cleaning is not included in the lease and is not provided by an outside company. Cleaning supplies as well as a carpet cleaner are available. Partners are expected to maintain a clean work environment for all.

When departing the office please complete the following:

1. Remove all trash including papers, cups, wrappers, etc.
2. Return furniture to original position
3. Return all resources used to original position

## Safety & Security

The personal safety our clinical partners is important. Proper safeguarding of self and property is always required. Significant investment has been made to provide a comfortable and professional environment for clinical partners, clients, and guests. Additionally, many clinical partners keep resources and other items secured in the office.

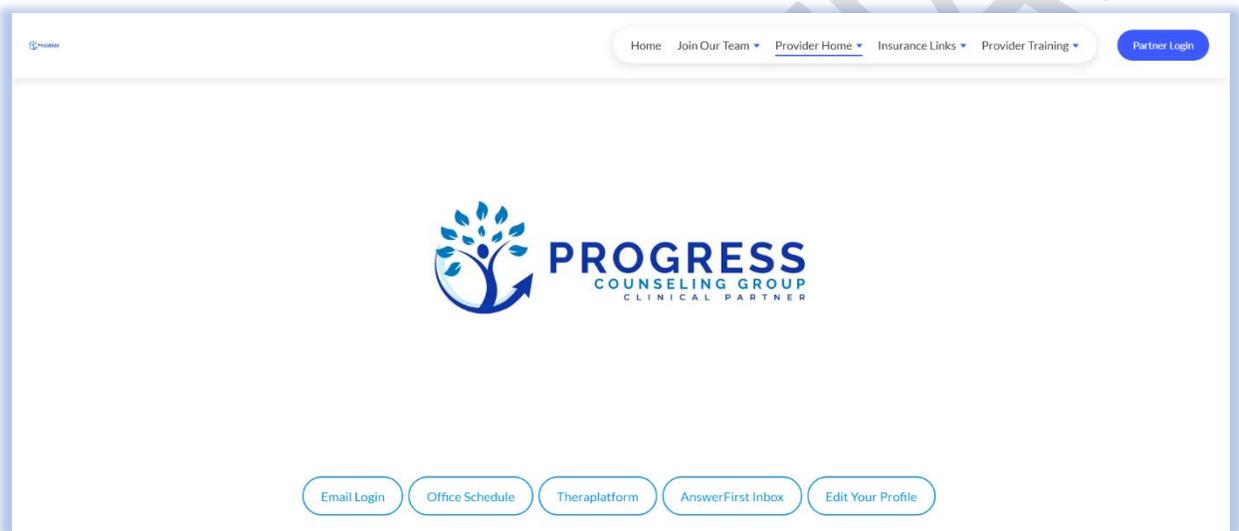
Safety and security guidelines all clinical partners are required to adhere to.

1. Observe personal safety guidelines
2. Exit building as directed by alarms and first responders
3. Report any suspicious activity to proper authorities
4. No weapons of any type are permitted in the office
5. Do not leave personal property in the office unsecured
6. Shut all lights and white noise machines when exiting for the day
7. Lock the office door when exiting for the day

## Clinical Partner Portal

Clinical Partners have secure access to dedicated online portal at <https://partners.progresscounselinggroup.com> The portal includes information to help Clinical Partners be successful in their practice.

- Compensation Details
- Third-Party Payer Information
- Marketing Information
- Message Center Access
- Office Scheduling
- Training



### Provider Home

Each Clinical Partner has an individual profile on the portal. The information included in the profile is used for Third-Party Payer credentialing and various business operations. Clinical Partners are responsible for maintaining their profile information.

#### View and Edit Profile

Click [Partner Login]

Click [Partner Home]

Click [My Profile]

## View Compensation Data

Click [Partner Home]

Click [Compensation]

Click [My Compensation Button]

Home Join Our Team Provider Home Insurance Links Provider Training Partner Login

### Compensation

[My Compensation](#)

[My Compensation Quick Guide](#)

#### Third-Party Payments

Partners are paid based for provided services that are fully paid by either the client or third-party payer. Payments are made at the end of the weekly that client payment is received. Advance payments are not available.

#### Credit Card Payments

All major credit cards are accepted. Clients are required to maintain a valid credit card on file to process payments. Credit card payments are auto processed at the end of business on the day of appointment. Client appointments not cancelled will result in the client getting charged. Credit card refunds are not issued. Client will receive a credit towards their next appointment.

#### Chargebacks

In the likely event that a client payment is charged back, either credit card or third-party, the chargeback amount is deducted from any payments owned partner.

show 50 entries

From: To: Search:

Invoice ID	Date Of Service	Provider Name	Client Name	Invoice Amt	Total Paid	Provider Pay Pct	Compensation	Pay Date
1	01/18/2020	Michael Moore, LCSW	Madison R.	\$110.00	\$110.00	80 %	\$88.00	12/31/2020
2	01/14/2020	Michael Moore, LCSW	Ellen Y.	\$100.00	\$100.00	80 %	\$80.00	12/31/2020
3	01/02/2020	Michael Moore, LCSW	Bryce W.	\$75.00	\$75.00	80 %	\$60.00	12/31/2020
4	01/06/2020	Michael Moore, LCSW	Adam S.	\$110.00	\$110.00	80 %	\$88.00	12/31/2020
5	01/06/2020	Michael Moore, LCSW	Sunni T.	\$50.00	\$50.00	80 %	\$40.00	12/31/2020
6	01/16/2020	Michael Moore, LCSW	Charlene S.	\$150.00	\$150.00	80 %	\$120.00	12/31/2020
7	01/15/2020	Michael Moore, LCSW	Richard V.	\$0.00	\$0.00	80 %	\$0.00	
8	01/13/2020	Michael Moore, LCSW	Justin L.	\$0.00	\$0.00	80 %	\$0.00	
9	01/16/2020	Michael Moore, LCSW	Carolyn C.	\$180.00	\$180.00	80 %	\$144.00	12/31/2020
10	01/02/2020	Michael Moore, LCSW	Panna P.	\$75.00	\$75.00	80 %	\$60.00	12/31/2020
11	01/14/2020	Michael Moore, LCSW	Allison O.	\$50.00	\$50.00	80 %	\$40.00	12/31/2020
12	01/07/2020	Michael Moore, LCSW	Alfred H.	\$75.00	\$75.00	80 %	\$60.00	12/31/2020
13	01/13/2020	Michael Moore, LCSW	Alexis L.	\$75.00	\$75.00	80 %	\$60.00	12/31/2020
14	01/15/2020	Michael Moore, LCSW	Craig F.	\$110.00	\$110.00	80 %	\$88.00	12/31/2020
15	01/16/2020	Michael Moore, LCSW	Bryan J.	\$220.00	\$220.00	80 %	\$176.00	12/31/2020
16	01/02/2020	Michael Moore, LCSW	Amanda R.	\$0.00	\$0.00	80 %	\$0.00	
17	01/08/2020	Michael Moore, LCSW	Marcus S.	\$150.00	\$150.00	80 %	\$120.00	12/31/2020

{Invoice ID} – Autogenerated transaction record

{Date of Service}

{Provider Name}

{Client Name} – Data pulled from session title section of Theraplatform appointment

{Invoice Amount} – All invoices are created at standard published rates for each service. Invoice amount will update to reflect discounts/write-offs.

{Amount Paid}

{Provider Pay %}

{Compensation} – prior to payment this is the projected earned compensation. Post payment is the actual amount paid to provider.

{Date Paid} – Date provider was paid.

Notes:

1. All data will initially display with the oldest transaction first. Click on the {Invoice ID} heading to filter to newest transactions.
2. Able to search by {Date of Service} dates and {Client Name}
3. Export to MS Excel or .CSV file format

#### [View Marketing Information](#)

Describes various marketing efforts to assist partners establish their practice.

Click [Partner Home]

Click [Marketing]

#### [View Provider Directory](#)

Public directory of all providers

Click [Partner Home]

Click [Provider Directory]

#### [View and Edit NPI information](#)

Link to NPPES to manage individual provider data.

Click [Provider Home]

Click [NPI Management]

Link to manage individual provider Credentialing data

#### [View and edit CAQH Data](#)

Login with individual provider credentials

Click [Partner Home]

Click [CAQH Preview]

Login with individual provider credentials

### [Insurance Links](#)

Links to insurance and other Third-party payer provider portals. Each clinical partner must register for individual access if desired.

[More information on Third-Party Payers](#)

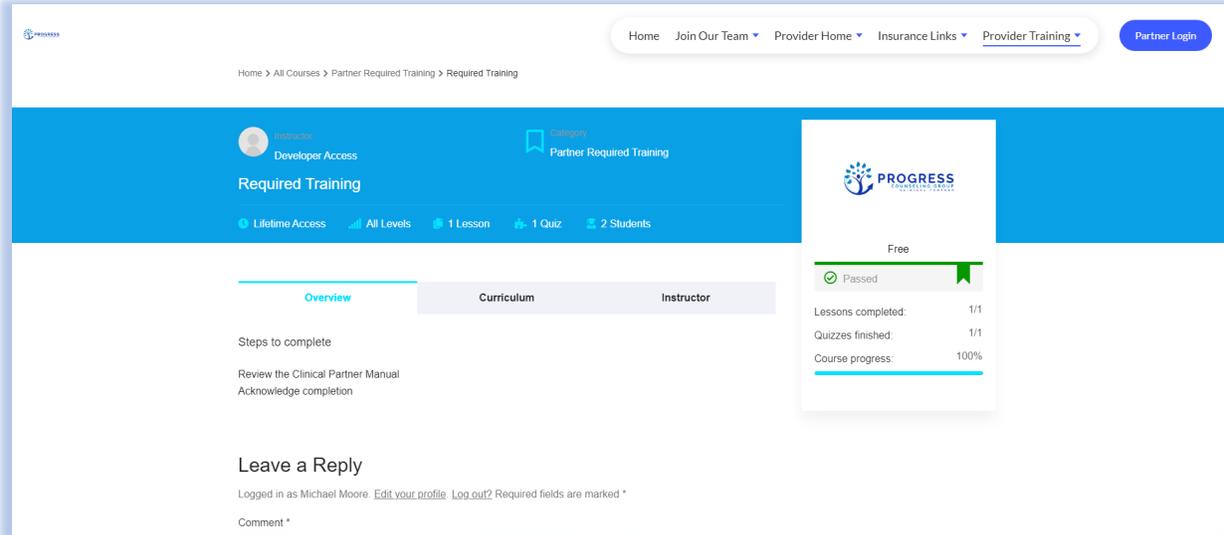
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## Provider Training

Resources hub for required and continuing education training.

Click [Required Training] to Access Training Portal

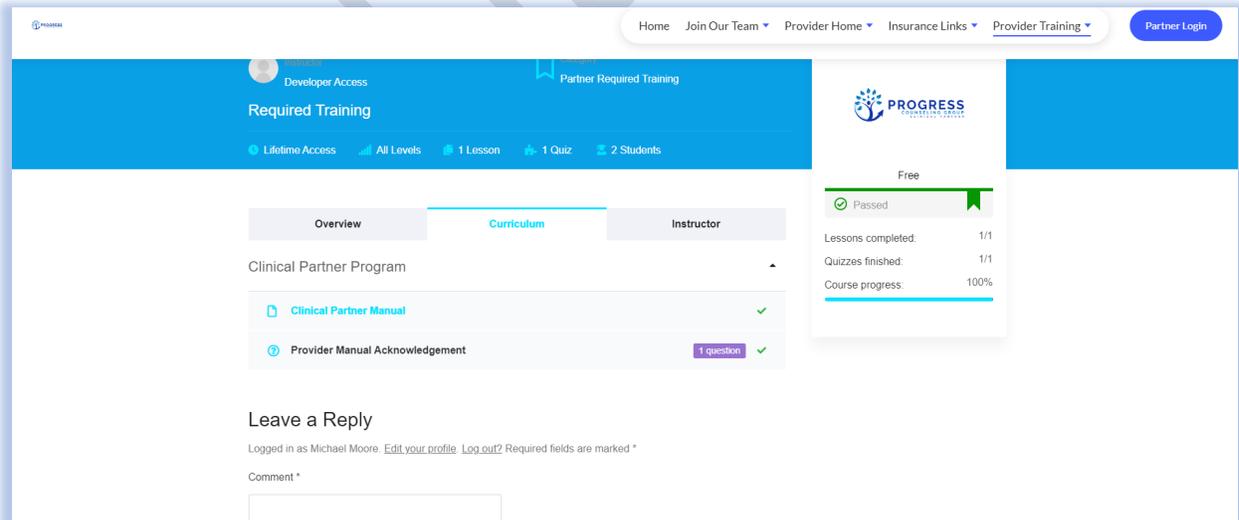
Click [Curriculum] to access the required course



The screenshot shows the 'Required Training' page with the 'Overview' tab selected. The page header includes navigation links: Home, Join Our Team, Provider Home, Insurance Links, and Provider Training, along with a Partner Login button. The breadcrumb trail is Home > All Courses > Partner Required Training > Required Training. The user is logged in as Michael Moore. The course is titled 'Required Training' and is categorized as 'Partner Required Training'. It is free and has a 'Passed' status. The course progress is 100%. The 'Steps to complete' section lists: 'Review the Clinical Partner Manual' and 'Acknowledge completion'. A 'Leave a Reply' section is visible at the bottom.

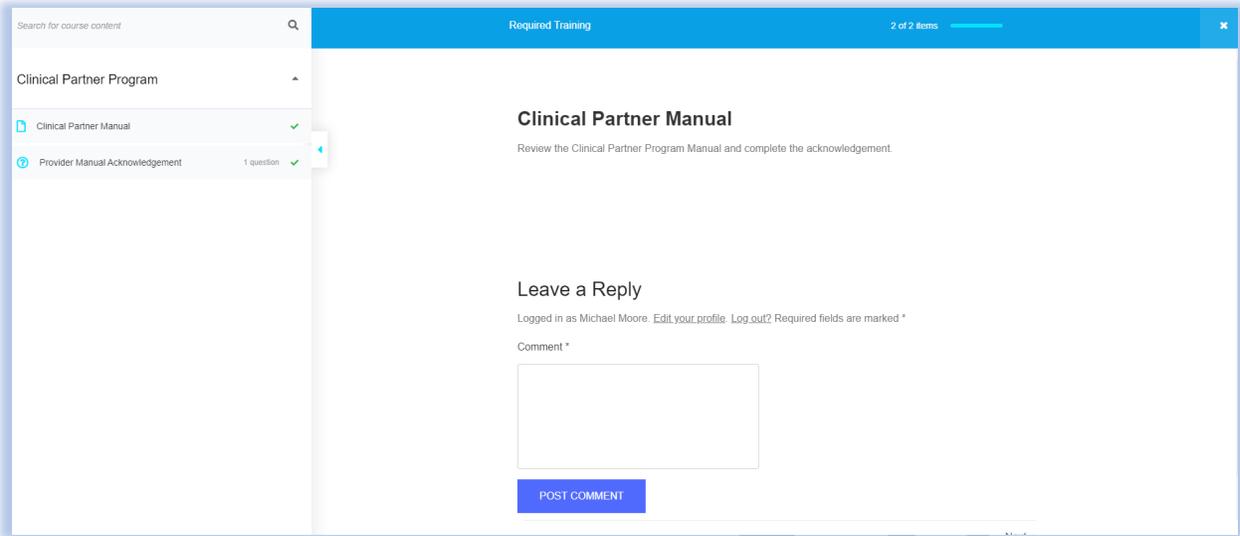
## Required Training

Link to Clinical Partner training hub. All contracted clinical partners are required to complete all training.



The screenshot shows the 'Required Training' page with the 'Curriculum' tab selected. The page header is identical to the previous screenshot. The breadcrumb trail is Home > All Courses > Partner Required Training > Required Training. The user is logged in as Michael Moore. The course is titled 'Required Training' and is categorized as 'Partner Required Training'. It is free and has a 'Passed' status. The course progress is 100%. The 'Curriculum' section lists two items: 'Clinical Partner Manual' and 'Provider Manual Acknowledgement', both with green checkmarks. A 'Leave a Reply' section is visible at the bottom.

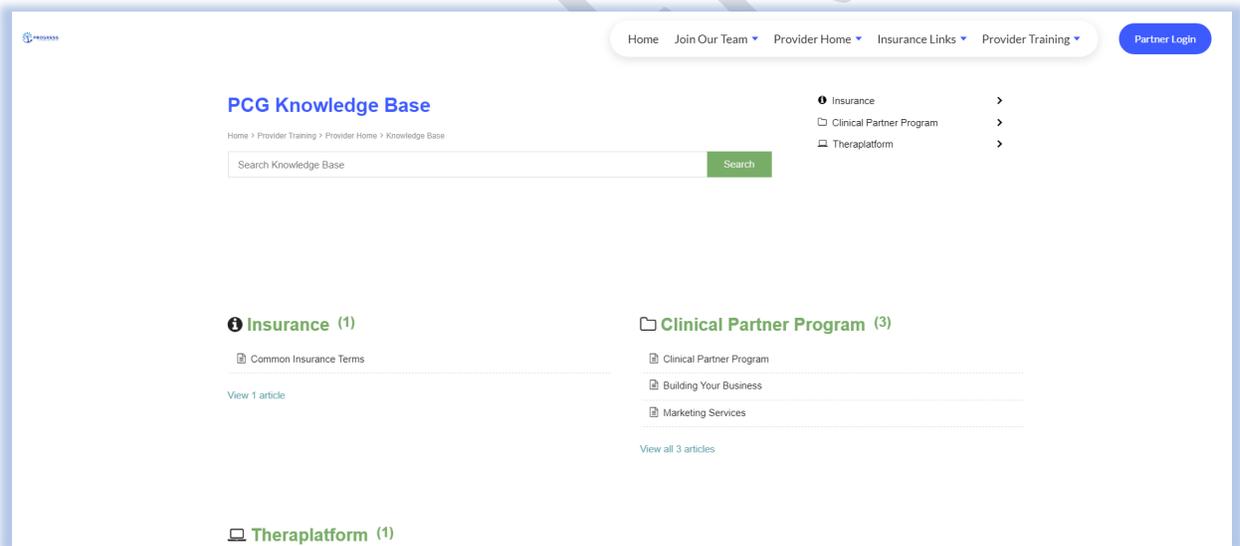
Select each topic to complete training.



\*Comments are optional, feedback is appreciated.

## Knowledge Base

Searchable database of information to assist providers manage their practice.



## CE Broker/Ace Classes

Links to third-party sources of continuing education training. The links are provided for convenience only. Clinical partners are not required to utilize either of these resources to meet licensure continuing education requirements.

## Clinical Partner Payments

Partners are paid based for provided services that are fully paid by either the client or third-party payer. Payments are made at the end of the weekly that client payment is received. Advance payments are not available.

Partners have the option to receive compensation payments via the following methods

- Zelle – Real-time money transfer - funds are transferred and available same day.
- ACH Direct Deposit – Funds transferred and available in approximately 2-3 business days.
- Check – Printed checked mailed to clinical partner. May take up to 10 business days to arrive. Additional delays may occur at depositing bank.

Clinical Partners have access to dedicated compensation reporting on the [Partner Portal](#)

Transaction details for all clinical partner invoices

- Invoice Number
- Invoice Date
- Session Name
- Invoice Amount
- Amount Paid
- Partner Compensation Amount
- Compensation Payment Date

## Third-Party Payments

Properly completed and submitted claims to third-party payers are typically paid within 60 days of submission. Claims require the following items to submit:

- Treatment Plan with Diagnostic Code
  - Medicare requires a minimum of two (2) diagnostic codes
- Progress Note

## Credit Card Payments

All major credit cards are accepted. Clients are required to maintain a valid credit card on file to process payments. Credit card payments are auto processed at the end of business on the day of appointment. Client appointments not cancelled will result in the client getting charged. Credit card refunds are not issued. Client will receive a credit towards their next appointment.

## Chargebacks

In the likely event that a client payment is charged back, either credit card or third-party, the chargeback amount is deducted from any payments owned partner.

## Third-Party Payers

Third-Party payers include insurance programs and Employee Assistance Programs (EAP). All clinicians are required to verify benefits prior to meeting with a client. Verification methods vary by payer.

## Common Insurance Terms

**Co-Payment** - A fixed amount (\$20, for example) you pay for a covered health care service after you've paid your deductible. Let's say your health insurance plan's allowable cost for a doctor's office visit is \$100. Your copayment for a doctor visit is \$20. If you've paid your deductible: You pay \$20, usually at the time of the visit. If you haven't met your deductible: You pay \$100, the full allowable amount for the visit. Copayments (sometimes called "copays") can vary for different services within the same plan, like drugs, lab tests, and visits to specialists. Generally, plans with lower monthly premiums have higher copayments. Plans with higher monthly premiums usually have lower copayments.

**Deductible** - The amount you pay for covered health care services before your insurance plan starts to pay. With a \$2,000 deductible, for example, you pay the first \$2,000 of covered services yourself. After you pay your deductible, you usually pay only a copayment or coinsurance for covered services. Your insurance company pays the rest. Many plans pay for certain services, like a checkup or disease management programs before you've met your deductible. All Marketplace health plans pay the full cost of certain preventive benefits even before you meet your deductible. Some plans have separate deductibles for certain services, like prescription drugs. Family plans often have both an individual deductible, which applies to each person, and a family deductible, which applies to all family members. Generally, plans with lower monthly premiums have higher deductibles. Plans with higher monthly premiums usually have lower deductibles.

**Co-Insurance** - The percentage of costs of a covered health care service you pay (20%, for example) after you've paid your deductible. Let's say your health insurance plan's allowed amount for an office visit is \$100 and your coinsurance is 20%. If you've paid your deductible: You pay 20% of \$100, or \$20. The insurance company pays the rest. If you haven't met your deductible: You pay the full allowed amount, \$100. If your total out-of-pocket costs reach \$6,850, you'd pay only that amount, including your deductible and coinsurance. The insurance company would pay for all covered services for the rest of your plan year. Generally, plans with low monthly premiums have higher coinsurance, and plans with higher monthly premiums have lower coinsurance.

## EAP vs. Insurance

Insurance providers pay EAP claims separate from insurance claims. It is important that the EAP service code is used when scheduling an EAP client appointment. If an EAP service code is not used the insurance provider processes as an insurance claim which may result in one of the following issues:

- Non-payment of claim
- Apply claim to deductible resulting in balance due by client.
- Pay claim minus copayment resulting in balance due by client.

## Third-Party Payer Resources and Links

### Aetna

Provides insurance and EAP benefits to its members.

EAP benefits are verified by:

Call (800)872-7322

Must have the following information:

1. Client Name
2. Client Address
3. Date of Birth

Once verified request representative to fax authorization form to (407)598-7797

[Provider Portal](#) – Availity provides access to benefit verification. All partners are provided with an Availity user account.

### AllOne Health

AllOne Health and its affiliates provide Employee Assistance (EAP) benefits for several employers. Members are authorized for a limited number of EAP appointments depending on their employer's agreement with AllOne Health and its affiliates.

[Provider Portal](#)

### All Savers Insurance

Division of United Health Care

[Provider Portal](#)

**IMPORTANT: SELECT [OPTUM] AS THE INSURANCE PROVIDER WHEN SETTING UP CLIENT INSURANCE INFORMATION.**

### Behavioral Health Solutions

Provides Employee Assistance (EAP) benefits for several employers. Members are authorized for a limited number of EAP appointments depending on their employer's agreement with Behavioral Health Solutions.

Provider Portal – Not Available

### CarePlus

Provides several Medicare Advantage insurance plans that are serviced through Magellan.

**IMPORTANT: SELECT [MAGELLAN] AS THE INSURANCE PROVIDER WHEN SETTING UP CLIENT INSURANCE INFORMATION.**

[Provider Portal](#) – Availity provides access to benefit verification. All partners are provided with an Availity user account.

## Cigna

Provides insurance and EAP benefits to members. Insurance benefits are verified using the provider portal.

[Provider Portal](#)

EAP benefits are verified by:

Call (800)926-2273

Must have the following information:

1. Client Name
2. Client Address
3. Date of Birth

## Compsych

Provides EAP benefits for several employers. Members are authorized for a limited number of EAP appointments depending on their employer's agreement with Compsych.

[Provider Portal](#)

## Government Employees Health Assurance (GEHA)

Part of the UMR division of United Health Care

Provider Portal – Not available, [MUST CALL PHONE NUMBER ON MEMBER ID CARD TO VERIFY BENEFITS.](#)

**IMPORTANT: SELECT [UMR WASAU] AS THE INSURANCE PROVIDER WHEN SETTING UP CLIENT INSURANCE INFORMATION.**

## Humana Military

Provides insurance benefits to retired, reserve and activity duty military members under the TriCare name. Individuals aged 65 or older have Medicare as the primary insurance. TriCare covers the cost of all copayments.

[Provider Portal](#)

## Lifeworks

Provides EAP benefits for several employers. Members are authorized for a limited number of EAP appointments depending on their employer's agreement with Lifeworks.

[Provider Portal](#)

## Magellan

Acts a servicing agent for multiple insurance companies. Currently:

- CarePlus
- Devoted

**IMPORTANT: SELECT [MAGELLAN] AS THE INSURANCE PROVIDER WHEN SETTING UP CLIENT INSURANCE INFORMATION FOR THE ABOVE PLANS.**

[Provider Portal](#) – Availity provides access to benefit verification. All partners are provided with an Availity user account.

## Medicare

Provides insurance benefits for qualified individuals based on age or disability.

**IMPORTANT: MEDICARE ADVANTAGE PLANS ARE NOT THE SAME AS MEDICARE. CLIENTS WITH MEDICARE ADVANTAGE PLANS REQUIRE VERIFICATION VIA THEIR ADVANTAGE PLAN PROVIDER.**

[Provider Portal](#)

## Optum

Provides insurance and EAP benefits for United Health Care companies, its affiliates and other insurance plans including:

- AARP Medicare Advantage
- AvMed
- Oscar

[Provider Portal](#)

**Note: United Health Care operates several brands, some brands have specific provider portals to verify benefits.**

- [UMR](#)
- [All Savers](#)
- [Golden Rule](#)

## Provider Data Management

All licensed and registered intern professionals are required to maintain accurate practice information in various databases for licensing and insurance credentialing.

### State Licensing

Each state requires providers to renew licenses periodically.

Alabama	Colorado	Delaware	<a href="#">Florida</a>	Georgia	Kentucky
Louisiana	Maryland	Mississippi	Nebraska	North Carolina	Ohio
Tennessee	Utah	West Virginia			

*\*\*The states included above have enacted legislation to participate in the counseling compact expected to take effect in late 2023 or 2024*

Some states may require the completion of Continuing Education courses as part of the license renewal process. Several vendors provide courses:

[CeBroker](#)

[Ace Classes](#)

### Provider Databases

#### [National Provider Number \(NPI\)](#)

[CAQH Proview](#) - Available at no cost to you, CAQH ProView eliminates duplicative paperwork with organizations that require your professional and practice information for claims administration, credentialing, directory services, and more.

#### [Third-Party Payer Provider Attestation](#)

Credentialed providers are required to review and attest their individual demographic information a minimum of 1X per quarter. Attestation is typically completed via the provider portal for each third-party payer.

## TheraPlatform – Quick Start Guide

TheraPlatform is the dedicated **HIPAA Compliant Electronic Health Record System** for all clinical partners. Clinical partners are required to utilize TheraPlatform in accordance with the Independent Contractor Agreement.

- Clinical Partner features include:
- Client Demographic Information
- Diagnosis and treatment history
- Billing and payment information
- Scheduling
- Resource Library of Therapeutic Tools
- Video library
- Dedicated Secure Client Portal
- Secure Messaging
- HIPAA Compliant Video Meetings

TheraPlatform provides a video library of tutorials for all features. Basic instructions for client setup are included herein.

The screenshot displays the TheraPlatform dashboard with the following data:

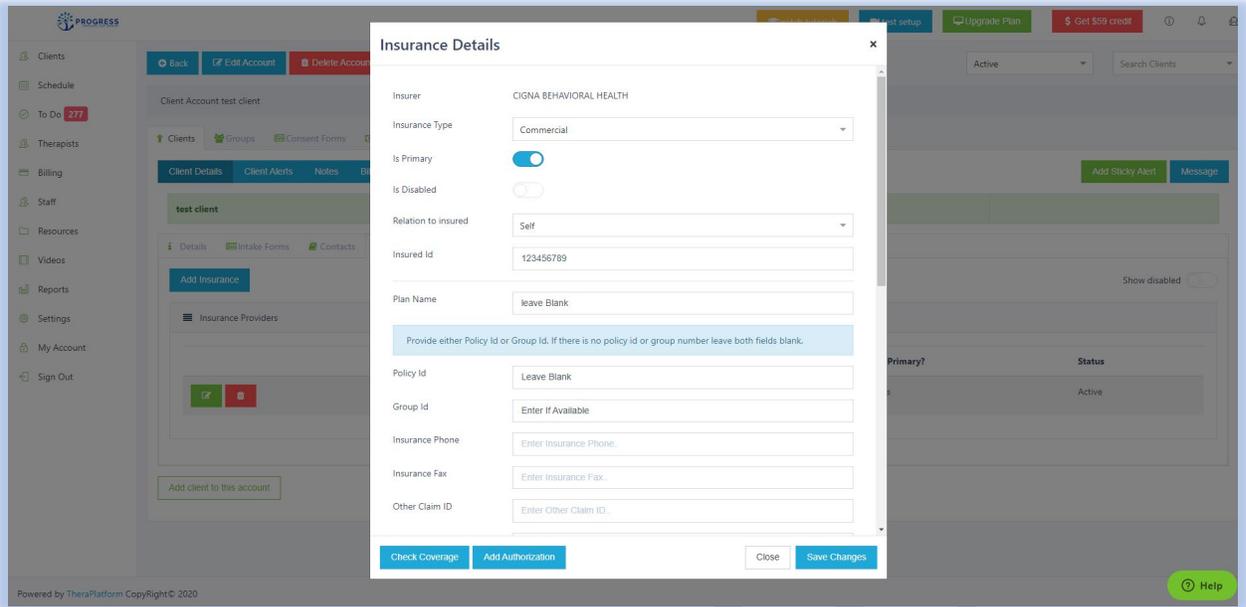
Section	Item	Count
Documentation	Treatment Plans Cosign Requests	
	Discharge Notes Cosign Requests	
	Expired Treatment Plans	
	New Faxes	
	Client Alerts	1
	Missing Notes	
Scheduling	Meeting Approvals	
	Incomplete Consent Forms	8
	Incomplete Demographics	13
	Incomplete Intake Forms	1
Billing	Failed Payments	
	Client Alerts	
	Uninvoiced Sessions	7
	Unpaid Invoices	180
	Scheduled Payments	
Insurance	Scheduled Claim Submissions	
	Draft Claims	2
	Pending Paid Claims	
	More Info Required Claims	2
	Expired Authorizations	
	Unprocessed Claims	
	Invalid Claims	1
	Rejected Claims	38
	Adjusted Claims	23
Client Alerts		

## Adding New Client

1. Click [Clients]
2. Click [+Add Client Account]
3. Enter client contact information
  - a. [First Name]
  - b. [Last Name]
  - c. [Email] X2
  - d. [SMS Phone] – Cell phone #
4. Send Consent Document
  - a. Deselect applicable not applicable language version
5. Select Intake Forms
  - a. CLIENT PROFILE – REQUIRED
6. Select [Require Demographics Information]
7. Click [Save Changes]

## Setup Client Insurance

1. Access Client Account
2. Click [Insurance] tab
3. Click [Add Insurance]
4. Select insurance provider from drop down list
5. Select “Self” as relationship to insured from drop down list
6. Enter [Insured ID]
  - a. This may be labeled as “member”, “subscriber” or “insured” on the client’s ID card.
  - b. **LETTERS AND NUMBERS ONLY – NO SPECIAL CHARACTORS**
  - c. **\*\*CIGNA EAP ONLY\*\* – ENTER THE 9 DIGIT AUTHORIZATION #.**
    - i. **DO NOT INCLUDE THE “\*” OR ANY NUMBERS AFTER**
7. Click [Save Changes]
8. EAP Authorizations – for clients using EAP benefits.
  - a. Click [Insurance]
  - b. Click Green “Edit” button
  - c. Select [Add Authorization] at bottom of page
  - d. Enter Benefit [Start Date]
  - e. Enter Benefit [End Date]
  - f. Enter procedure code for the specific EAP provider – LIST BELOW
  - g. Enter Authorization #
  - h. Click [Save Changes]
9. **UPDATING INSURANCE INFORMATION - When client provides updated insurance information the new insurance must be added to client account and the existing insurance information disabled.**
  - a. Add new insurance information
  - b. Edit existing insurance information
    - i. Click {Green Button}
    - ii. On insurance detail page select {Is Disabled}



## Setup Default Services and Pricing

1. Access Client Account
2. Click [Services] tab
3. Click [Add Service] button
4. Select service from drop down
5. Enter Client Specific Price.
6. Select Default [On or Off]
7. Click [Save]

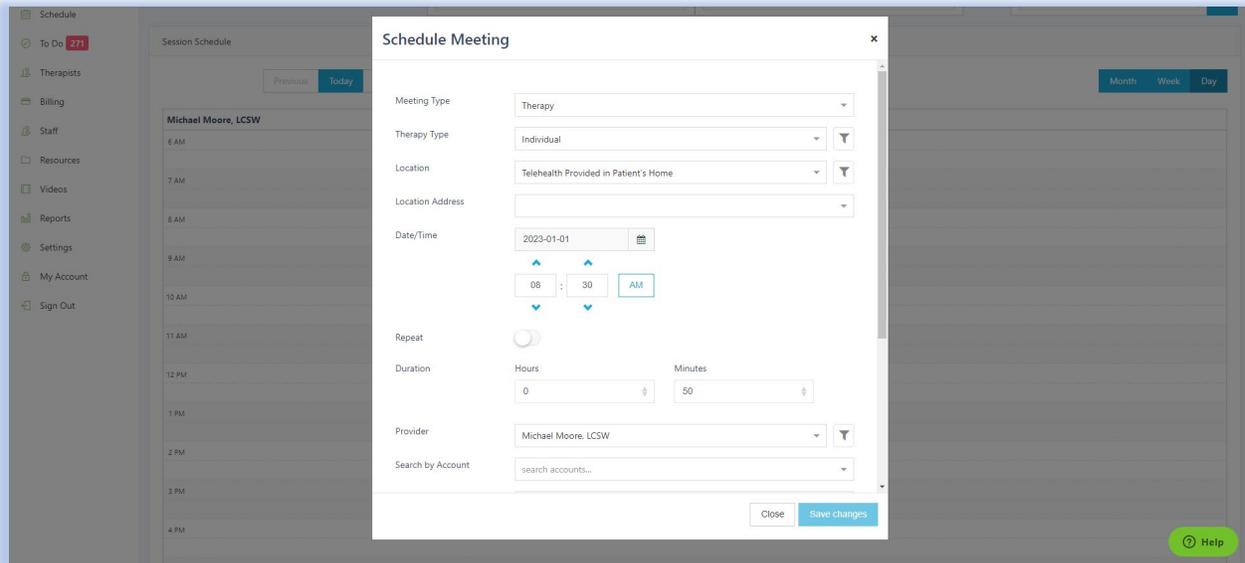
## PRO TIPS

1. **Enter the default service code for all clients to ensure proper billing.**
2. **Enter the default Price for No Show/Late Cancellation Fee for all clients.**

## Scheduling Client Appointments

All Client sessions must be scheduled in Theraplatform. All Virtual sessions must be conducted in Theraplatform. Other teleconference platforms are not allowed.

1. Click [Schedule]
2. Select the date of the desired appointment and click on the day.



3. Select {Meeting Type}
4. Select {Therapy Type} **\*See Note for couples and family therapy**
5. Select {Location}
6. Select {Location Address} for in-office appointments
7. Select/Verify {Date}
8. Select {Time}
9. Select {Repeat} to set as recurring appointment
  - a. Enter recurring frequency and end date
10. Set {Duration} in Hours or minutes
11. Select/Verify {Provider}
12. Select {Clients} **\*See Note for couples and family therapy**
13. Enter {Services} for each client **\*See Note for couples and family therapy**

EAP PROCEDURE CODES	USAGE	REIMBURSEMENT RATE
AETNA EAP COUNSELING	Individual/Couples/Family	\$60.00
ALLONE EAP COUNSELING	Individual/Couples/Family	\$65.00
BHS EAP	Individual/Couples/Family	\$65.00
CIGNA EAP COUNSELING	Individual/Couples/Family	\$60.00
COMPSYCH EAP COUNSELING	Individual/Couples/Family	\$35.00
LIFEWORKS EAP COUNSELING	Individual/Couples/Family	\$60.00
OPTUM EAP COUNSELING	Individual/Couples/Family	\$73.06

Code Description	Usage	Standard Rate
[90791] Initial Assessment	Initial Consult with client only	\$150.00
[90832] Individual Counseling - 30	16-30 Minute Appointments	\$30.00
[90834] Individual Counseling - 45	31-45 Minute Appointments	\$100.00
<b>[90837] Individual Counseling - 50</b>	<b>46-60 Minute Appointments</b>	<b>\$125.00</b>
[90839] Individual Crisis Counseling	61-74 Minute Appointments	\$150.00
[90840] Additional 30 Minute Crisis Counseling	Can only be combined with procedure code [90839]	\$100.00
[90846] Family or Couples Counseling, without patient present		\$125.00
[90847] Family or Couples Counseling, with patient present		\$125.00

14. Set/Verify {Meeting Title} **Default is client name – this data is used for compensation reporting.**
15. Add {Comments} if necessary
16. Click [Save Changes]

#### **\*COUPLES AND FAMILY COUNSELING**

- **ONLY the billed party should have a billable procedure code.**
- **Additional attendees MUST have the “Additional Attendee” procedure code**
- **If additional attendees have a billable procedure code the client will receive an invoice for services and the payment method on file will get charged. Beginning 2/1/2023 clinical partners are charged \$15 for any refunds resulting from incorrect procedure codes**

#### **Finalizing Client Appointments**

To ensure clients are properly invoiced and third-party payer claims are generated all sessions must be finalized by midnight on the date of service. Upon completion of client meeting, please complete the following steps.

1. Verify proper service code is entered for all client sessions.
2. Add Progress Note
  - a. From the client appointment details click on [Add Note] to complete.
    - i. If a treatment plan does not exist for the client, Theraplatform will prompt for completion.
3. In-Office appointments only
  - a. Click [Finish] after inputting note.

## Canceling Appointment

Canceled appointments must be canceled in Theraplatform by the end of the day to prevent client billing.

1. Access Appointment in Schedule
2. Click [Cancel]
3. Select Reason
4. Apply No Show/Late Cancellation Fee service code as appropriate
5. Click [Save]

**IMPORTANT NOTE: All canceled appointments require a cancellation progress note.**

## Add Cancellation Note

1. Access Appointment in Schedule
2. Click [Add Note]
3. Click [Browse Library]
4. Select Cancellation Note
5. Click [Save Changes]
6. Click [Close]

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## Service and Procedure Codes

It is imperative that the proper service/procedure code is used for each client appointment. Improper use of service/procedure codes may result in delayed payment or non-payment for services rendered.

Progress Counseling Group uses three type of service/procedure codes:

- EAP Procedure Codes – Required for all services/procedures that are billed to a third-party EAP provider.
- Insurance Procedure Codes – Required for all services/procedures that are billed to third-party insurance provider.
- Other Service/Procedure Codes – Required for all services billed directly to client. These include services such as No Show/late Cancellation Fees, Medical Records Preparation, etc.

### EAP Procedure Codes

EAP PROCEDURE CODES	USAGE	REIMBURSEMENT RATE
AETNA EAP COUNSELING	Individual/Couples/Family	\$60.00
ALLONE EAP COUNSELING	Individual/Couples/Family	\$65.00
BHS EAP	Individual/Couples/Family	\$72.00
CIGNA EAP COUNSELING	Individual/Couples/Family	\$60.00
COMPSYCH EAP COUNSELING	Individual/Couples/Family	\$35.00
LIFEWORCS EAP COUNSELING	Individual/Couples/Family	\$60.00
OPTUM EAP COUNSELING	Individual/Couples/Family	\$73.06

### Insurance Procedure Codes

Code Description	Usage	Standard Rate
[90791] Initial Assessment	Initial Consult with client only	\$150.00
[90832] Individual Counseling - 30	16-30 Minute Appointments	\$30.00
[90834] Individual Counseling - 45	31-45 Minute Appointments	\$100.00
<b>[90837] Individual Counseling - 50</b>	<b>46-60 Minute Appointments</b>	<b>\$125.00</b>
[90839] Individual Crisis Counseling	61-74 Minute Appointments	\$150.00
[90840] Additional 30 Minute Crisis Counseling	Can only be combined with procedure code [90839]	\$100.00
[90846] Family or Couples Counseling, without patient present		\$125.00
[90847] Family or Couples Counseling, with patient present		\$125.00

Other Service/Procedure Codes

<u>Code Description</u>	<u>Usage</u>	<u>Standard Rate</u>
<b>Individual/Couples/Family Counseling</b>	<b>DO NOT USE – This is a generic procedure code for clients to select when booking online</b>	<b>\$0.00</b>
<b>Additional Attendee</b>	<b>Use to invite an additional person to a virtual couples/family session</b>	<b>\$0.00</b>
<b>Prepare Documents</b>	Use to bill for time spent preparing medical records for clients or third parties.	\$125/Hour
<b>Emotional Support Animal (ESA)</b>	Assessment and documentation completion to support client's request for Emotional Support Animal for travel or housing.	\$125.00
<b>No Show/Late Cancellation Fee</b>	Use to charge clients a fee for late cancelations (within 24 hours) or no show for appointment	Standard Fee is \$125. Providers may establish individual fees.

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## Client Management

Clinical Partners are required to always adhere to the highest ethical standards.

### Treatment Plans

All clients require a treatment plan after the initial consultation. Theraplatform will prompt to create a plan when entering the initial progress note. A template has been provided to capture presenting symptoms and diagnosis. The following additional information is required

1. Treatment Frequency
2. Long Term Goals – Wiley treatment plan templates are available at an additional cost
3. Short Term Goals – Wiley treatment plan templates are available at an additional cost

### Progress Notes

All client meetings require progress notes. Notes should be added by the close of business on the day of client meeting. A template is provided for ease of use. The following information is required:

1. Intervention Method
2. Client Reported Progress
3. Client Reported Stressors
4. Clinician Observations
5. Treatment Plan Next Steps

Delays in Treatment Plan or Progress Note entry will result in delayed payment to clinical partner.

### Client Payments

Client invoices are automatically generated at the end of each business day. Clients receive an email invoice that details amount billed for services. Invoices reflect the full standard cost of services. Insurance or internal discounts are not reflected on these invoices.

Client payments are automatically processed overnight on the day of service. If payment is not authorized, the system will continue to authorize daily. If not authorized within 15 days, clients will receive a past due notice. Clinicians are notified of any account with a balance due more than 30 days.

Clients are emailed a receipt for the payments that references the invoice# the amount was paid toward.

Direct all client billing questions to [billing@progresscounselinggroup.com](mailto:billing@progresscounselinggroup.com)

### Insurance Billing

Insurance claims are generated and submitted the day following client meeting. Client accounts will show a balance due until payment has been received by the insurance provider. Clients may receive past due notices until insurance payment is received.

When a third-party payer applies a client's claim to the annual deductible, the balance becomes owed by the client. Our contracts with insurance providers allow us to charge up to contract rate for services. This rate varies by payer. When this occurs, the client receives an explanation of benefits (EOB) from their insurance provider detailed the amount owed from the client. The client also receives an electronic invoice in Theraplatform that explains the charge. Our standard practice has been to give client's 15 days to remit payment. Moving forward we will allow 10 days before the client's credit card is charged. Deductible amounts and copayments will auto-charge on the day of insurance payment.

### Client Cancellations

Client cancellations must be updated in Theraplatform by the end of day of the scheduled appointment. Client appointments not cancelled by end of day will result in client invoicing and the client receiving the invoice.

### Client Discounts

Partners ultimately decide the price of service for a client. If a discount is offered to a client, Theraplatform has the capability to apply default pricing for any client. To set client specific pricing follow the instructions in the [Set Default Services and Pricing section](#).

### Client Experience

The treatment experience of our clients is the most critical aspect of our practice. Clinical Partners are expected to always treat clients with dignity and respect while providing the highest level of clinical intervention. If a client has any concerns that a partner is unable to address, direct the client to contact:

Michael Moore, LCSW  
407-734-3338  
[michael@progresscounselinggroup.com](mailto:michael@progresscounselinggroup.com)

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## Treatment Resources

### Resource Library

Therapatform includes library of treatment resources for partner use. Partners are encouraged to add any additional resources they choose.

Resources Include:

- Worksheets
- Articles
- Videos

Clinical partners must adhere to all copyright requirements when adding resources. All resources added to Resource Library become property of Progress Counseling Group.

### Recommended Reading List & Workbooks

Progress Counseling Group maintains a recommended reading list online at [progresscounselinggroup.com/resources](https://progresscounselinggroup.com/resources). The recommended reading list includes link to amazon.com for client purchase. Progress Counseling Group, its affiliates or clinical partners **DO NOT** receive any compensation for items purchased by clients or website visitors.

### Books, Magazines, Periodicals

Each office includes a library of selected material for clinical provider use. These materials are not for clients. If a client requests materials, please inform clients that most materials are available in-stores or online.

### Assessments

Several Clinical Assessments are available for clinical partner use. Assessments are available in Therapatform or online at [progresscounselinggroup.com/selfassessment](https://progresscounselinggroup.com/selfassessment)