

## **WHAT'S THE DIFFERENCE BETWEEN OFFICE ALLY AND PRACTICE MATE?**

Several people have asked me about Practice Mate and the difference between that and Office Ally. Here goes:

Office Ally (OfficeAlly.com) acts as a clearing house for medical claims (what we submit to insurance companies so we may get paid by them). That is all it does. It allows you to create templates for the claim form for each patient to make life easier for repeat claims, create and submit claim forms either electronically or, if a pre-approval to submit an electronic form is needed but not present, print paper and mail the claim for a \$0.40 charge /per claim form. It also allows tracking of the progress of claims and shows the status of claims and, if they are rejected, why they are rejected so they can be fixed. It also allows processing of credit cards (for a fee - I don't know how much but I suspect it's more than Square, PayPal or Quicken charge), checking eligibility, and other functions related to billing. It is HIPAA compliant and you get to sign a Business Associate Agreement with them for service. Office Ally sends claims to over 4400 payers. That's it. It's a clearing house.

Practice Mate, a division of Office Ally, includes all of that and more. Some of those services, like tracking of claims, are done through Office Ally (same password - you can get there from a link marked "service menu" on every page.) The functions that aren't part of Office Ally are the practice management functions. Most of them are free. These include patient demographics, scheduling and tracking, claims/billing, accounting, patient management (creating new patients, listing their insurance, tracking visits if needed by the insurance, creating templates for claims, and uploading patient documents to the file), "patient portal" (more about that in a bit), and office management (preferences, calendar maintenance, bill setup, etc.) All of these functions are free of charge. The paid functions are EHR (Electronic Health Records), accepting credit cards and e-prescribe. This software is for any medical professional, not just psychotherapists or other mental health professionals. It is all HIPAA compliant, you have to sign up for this, and you get a signed Business Associate Agreement.

The "patient portal" is a HIPAA compliant means for you and your patients to communicate securely via email about appointments and other matters. Patients can upload forms and information to your account. They also use this to request a change of

appointment or schedule an extra appointment (you are notified in your regular email that an appointment request has been made so you don't have to keep obsessively checking your patient portal section). The process is not difficult. The patient side of it is called "Patient Ally." I have several patients who use this, though I prefer phone calls. They have sent me documents as well as requesting changes of appointment. It can theoretically be used by a potential patient to request an appointment but I haven't tried to do that yet. What shows on the calendar they look at is what hours the office is open and what hours are available. It doesn't say what is going on during the hours that aren't available.

Both Office Ally and Practice Mate are easy to use. In all honesty I didn't want to use this stuff but when the new CMS forms came out and my favorite source for office management software, Queen City Computer Press, makers of the Instant Office Kit for Psychotherapists, closed shop I decided not to go with another bit of software to send paper forms. I started off using Office Ally and then got curious about Practice Mate. I found both to be easy to use and Practice Mate to be much more versatile than Office Ally. I have the patient's visit scheduled on my appointment list. When the patient comes in I check him/her in through the software and that starts the creation of a visit, which is the start of the billing process. At the end of the session I check the patient out. That whole process takes less than one minute. I do my billing at night - in fact I just did the billing for my one insurance patient today and it took me four minutes total.

This is probably more information than anyone was seeking but I just couldn't stop myself. Those who are already using Practice Mate know what I'm talking about. Those who already use Office Ally also know how much it helps to send in insurance claims electronically. Fewer mistakes, quicker resolution of any errors and faster payments.

Both Office Ally and Practice Mate work on Windows, Mac and IOS (iPads) and their tech support is truly amazing. They are located in Washington (State) so their office hours start at east coast time but end at west coast time. There's plenty of time to call. They are patient like crazy, do tutorials over the phone and also suggest ways to use the software more efficiently along with taking care of the reason for the call.

I know there are other types of practice management software and want to check them out but have a lot of time and effort invested in using this. If anyone is using some other practice management software please contact me at [jay@jaykorman.com](mailto:jay@jaykorman.com). Let me know what your opinion is of the software you use and what are that software's recommending features.

Anyway, that's the difference between Office Ally and Practice Mate. In

a nutshell, Practice Mate includes Office Ally services and then adds on to that.

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