**InSync**

1. **Features to Keep**

* ﻿﻿Link LT to ST goals with care giver
* ﻿Copy previous note to carryover (segmented)
* Post It Note Reminders for Plan of Care
* ﻿﻿Shared Visible Schedules
* ﻿﻿Send "To- Do's" to others
* ﻿﻿Parent-side
* ﻿﻿Encounter Type w/ Preset Codes
* Email Chart notes directly to parents
* Direct Fax from Software
* See goals of other disciplines
* ﻿﻿Face Sheet w/ Demographic Data
* ﻿Visit Counts
* Visibility to Data
* Simple Layout
* The ability to change viewing options
* User friendliness
* Reporting tools- Finance Reports
* Smooth transition claim to claim.
* Reporting Functionality

1. **Features to Add**

* Visible customizable goal Progress Reporting Templates (Connected to Chart Notes)
* ﻿﻿Isolate Plan of Care.
* ﻿﻿API (Phone App and Connect to Outlook Business 365)
* ﻿Strip off unnecessary features (Too many superfluous/Out of Scope Features).
* Assign client to therapist from waitlist
* ﻿Color coordinate waitlist
* ﻿﻿Program interconnectivity
* ﻿Comments is NOT a feature
* ﻿﻿**Assign rooms W/accuracy**
* ﻿﻿Multi-Tab Capability in InSync
* Connections to Billing, Diagnosis, Codes, Notes
* Import Forms/Templates from word into InSync to generate Note
* ﻿﻿Calendar Features with Blocking  
  (HIPAA Compliance and calendar that doesn’t auto-correct.
* ﻿Privacy Levels by Users (Visibility Only)
* ﻿﻿Client Card
* ﻿Recorded Training Pertinent to Uses
* ﻿ESIT- Co-writing
* ﻿﻿Support for In Sync
* ﻿Family Accounts
* Customizability
* Reminders
* Payment System
* One source for Information/Data instead of having various different pages/ locations.
* Communication with insurance companies
* Card Swiper/Reader
* More payment options and abilities
* Direct search functionality for faxing page.
* Adding more information boxes for each family/child (ex: secondary email).
* Linking clinics to providers
* Accurate text reminders with rescheduling option for evals.
* Emergency Contact
* Pass Down log of events that’s attached to the child’s card.
* Consolidate tabs (Many aren’t used).
* Increase font size/ improve overall accessibility options.
* Update Diagnosis Codes (ICD 10) with notifications and or notification to update.
* Better notification of errors and updates!! – instance where an additional character was needed, but Insync failed to say what was wrong.
* Changes in patient billing status.
* Being able to add/create accounts and overall control over EHR.
* Create/develop custom patient forms.

1. **InSync Flaws**

* Cannot store Diagnosis Codes
* ﻿﻿Fax Limit (File Size)
* ﻿﻿Knowledge of Features (Tribal Knowledge amongst organization).
* Lack of Training
* List of ROI Accessible in demographics tabs.
* Streamline interconnectivity.
* ﻿﻿PCIT Data Entry highly Manual
* ﻿﻿Software speed both locations
* Hide/ Remove non-applicable ICD-10 Codes
* Diagnosis Look up
* Can’t have more than one tab open.
* Loopholes to get functions to work.
* Data Sync (Wants 1 place to get all data from).
* Payment System not included.
* Billing System Miscommunication
* Faxing Speeds
* Parent file search for their children (Unable to search by parents’ name).
* Grouping Families together (Family Records)
* Removing misc./incorrect files from patient portal.
* Language Accessibility
* Separate Inactive/Active status lists (create a column with status)
* Send mass form to active clients.
* Ability for parents to update ROIs and other forms.
* Icons(little pictures) on left hand side don’t accurately describe function.
* Lack of accounts and different use cases to needed info (Turn over log department to department for each child- masks confidential info).
* Multiple windows for billing.
* Charged for looking at insurance info by insurance company/Insync? -Must use “Availity” to avoid charges.
* Updates in Diagnosis Codes
* Status of claims not accurate or refreshable and notifications not sent.

1. **Concerns**

* Time to train/ Starting from Scratch
* Training won’t apply to the features used.
* Cost
* Accurate/smooth Data transfer (Ensure formatting is correct and mirrors InSync).
* When contract ends, do we lose all data? (Keep in mind of deadline).
* Attempting to switch over and coming back due to issues.
* Grouping of families messing up the billing side (system confusing different family members).
* Team to help the transfer or a program to easily transfer.

Key

* Purple- Therapists
* Green- Administrative Team
* Orange- ESIT
* Blue- Developmental Services Coordinator/ Brian
* Red- Family Care Coordinator/Grace
* Cyan- Early Learning
* Gold- Finance
* Silver- IT