

BEST PRACTICES



WebPT EMR



Verify accuracy of [insurance settings](#) in WebPT before beginning any documentation.

Ensure patient has correct insurance assigned to case ([see step 7](#)) before beginning any documentation.

Begin a new case ([see step 7](#)) when a patient has a change of insurance (including Self Pay).

Log all [patient payments](#) upon collection.



Don't browse in multiple clinics in multiple browser tabs.

Don't start a new patient note before finalizing the previous one.

Don't rename therapist calendars as this breaks reporting.

Don't overwrite user profiles or patients. Always create a new one.

Don't enable "autofill" on browsers. This feature can populate incorrect information into fields and saves PHI in your browser.