



General Onboarding

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- **Initial Set Up**
- **Billing**
- **Clinical Documentation**
- **Other Tools and Features**



Main Navigation

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- Schedule
- Caseloads
- Patients
- Billing
- Therapy tools
- Teletherapy ^{beta}

- Ambiki.com
- Ambiki blog
- Professionals
- Help center
- Give feedback
- Messages
- What's new?

Signed in successfully.

July 15th, 2024 1:08 PM

Go to today's schedule ->

Now	12:45 PM	Chicken Little	45 min.	In-person (Therapy)
In about 2 hours	3:00 PM	John Smexample 3	45 min.	In-person (Therapy)

Authorizations needing attention (3) *i* View all

Patient	Expires in	Remaining visits
Boop, Betty	Expired	11
Boop, Betty	16 days	5
Mouse, Mickey	N/A	1

Alerts (7) *i* View all

No active evaluation on file	Minnie Mouse	Complete ✓	Silence 🔕
No active plan of care on file	Minnie Mouse	Complete ✓	Silence 🔕
No active evaluation on file	Minnie Mouse	Complete ✓	Silence 🔕
No active plan of care on file	Mickey Mouse	Complete ✓	Silence 🔕
MCD eligibility	Yogi Bear	Complete ✓	Silence 🔕

Documentation needing attention (53) *i*

Visit notes needing attention (42)

Displaying most recent 10 - View all

Date	Status	Patient
12/12/2023	Missing billing	Yogi Bear
02/20/2024	Missing billing	Minnie Mouse
02/22/2024	Missing billing	Betty Boop
03/07/2024	Missing billing	Pink Panther
03/07/2024	Missing billing & signature	Yogi Bear
03/16/2024	Invalid	Yogi Bear
03/16/2024	Invalid	Yogi Bear
04/05/2024	Missing billing & signature	Pink Panther
04/04/2024	Invalid	Betty Boop
04/04/2024	Invalid	Betty Boop

Evaluations needing attention (5)

Date	Status	Patient
03/13/2024	Missing billing	Pink Panther
04/07/2024	Missing signature	Yogi Bear
04/07/2024	Missing billing & signature	Yogi Bear
06/11/2024	Missing billing & signature	Yogi Bear



Ambiki Search Ambiki... 2

Organization menu
Ambitious Idea Labs (...)

- Home
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- Billing
- Therapy tools
- Teletherapy *beta*
- Ambiki.com
- Ambiki blog
- Professionals
- Help center
- Give feedback
- Messages
- What's new?

Home / Home

July 24th, 2024 12:29 PM
Go to today's schedule ->

Now	12:15 PM	Road Runner	60 min.	In-person (Therapy)
In about 3 hours	3:45 PM	Bugs Bunny	45 min.	In-person (Therapy)

Authorizations needing attention (3) [View all](#)

Patient	Expires in	Remaining visits
Boop, Betty	Expired	11
Boop, Betty	7 days	5
Mouse, Mickey	N/A	1

Alerts (11) [View all](#)

	Review (custom)	Yogi Bear	Complete ✓	Silence ⏪
	No active plan of care on file	Minnie Mouse	Complete ✓	Silence ⏪
	No active plan of care on file	Daisy Duck	Complete ✓	Silence ⏪
	No active plan of care on file	Bugs Bunny	Complete ✓	Silence ⏪
	No active evaluation on file	Daisy Duck	Complete ✓	Silence ⏪
	No active evaluation on file	Minnie Mouse	Complete ✓	Silence ⏪
	No active plan of care on file	Mickey Mouse	Complete ✓	Silence ⏪

Documentation needing attention (50)

Visit notes needing attention (39)
Displaying most recent 10 - [View all](#)

Date	Status	Patient
12/12/2023	Missing billing	Yogi Bear
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02/22/2024	Missing billing	Betty Boop
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03/07/2024	Missing billing & signature	Yogi Bear
03/16/2024	Invalid	Yogi Bear
03/16/2024	Invalid	Yogi Bear
04/05/2024	Missing billing & signature	Pink Panther
04/04/2024	Invalid	Betty Boop
04/04/2024	Invalid	Betty Boop

Evaluations needing attention (6)

Date	Status	Patient
03/13/2024	Missing billing	Pink Panther
04/07/2024	Missing signature	Yogi Bear
04/07/2024	Missing billing & signature	Yogi Bear

Home Screen: Organization Menu
(including organization-level settings, roles and permissions, and subscriptions)

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July 24th, 2024 12:29 PM

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Alerts (11) [View all](#)

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●	No active plan of care on file	Minnie Mouse	Complete ✓	Silence ⌵
●	No active plan of care on file	Daisy Duck	Complete ✓	Silence ⌵
●	No active plan of care on file	Bugs Bunny	Complete ✓	Silence ⌵
●	No active evaluation on file	Daisy Duck	Complete ✓	Silence ⌵
●	No active evaluation on file	Minnie Mouse	Complete ✓	Silence ⌵
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Documentation needing attention (50) [i](#)

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04/07/2024	Missing billing & signature	Yogi Bear

Home Screen: User Settings
(including user-level settings, credentials, discipline, supervisor/supervisee, and NPI)

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Documentation needing attention (50) [i](#)

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04/07/2024	Missing billing & signature	Yogi Bear

Home Screen: Clinical Information and Tools

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Documentation needing attention (50) [View all](#)

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Home Screen: Administrator Dashboards

(including dashboards and faxing)

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Documentation needing attention (50) [View all](#)

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Home Screen: Help Center & FAQ (FAQs)

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Alerts (11) [View all](#)

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04/07/2024	Missing signature	Yogi Bear
04/07/2024	Missing billing & signature	Yogi Bear

Home Screen: Feedback and Support Messages

	No active evaluation on file	Minnie Mouse	Complete ✓	Silence ✕
	No active plan of care on file	Mickey Mouse	Complete ✓	Silence ✕
	MCD eligibility needed (custom)	Yogi Bear	Complete ✓	Silence ✕
	Auth (custom)	Yogi Bear	Complete ✓	Silence ✕
	No active evaluation on file	Minnie Mouse	Complete ✓	Silence ✕

Showing 10 out of 11 - [View all alerts](#)

Events missing attendance (6) <small>(past 2 weeks)</small>		
07/17/2024 1:00 PM	Tom Cat	View schedule
07/17/2024 8:15 AM	Betty Boop	View schedule
07/11/2024 4:45 PM	Betty Boop	View schedule
07/11/2024 4:45 PM	Betty Boop	View schedule
07/11/2024 2:45 PM	Daisy Duck	View schedule
07/10/2024 5:30 PM	Mickey Mouse	View schedule

Birthdays this week (0) (i)

No patient or teammate birthdays today.

04/07/2024	Missing signature	Yogi Bear
04/07/2024	Missing billing & signature	Yogi Bear
04/29/2024	Missing billing & signature	Tom Cat
06/11/2024	Missing billing & signature	Yogi Bear
06/11/2024	Missing billing & signature	Betty Boop

Plans of care needing attention (5)		
Date	Status	Patient
05/15/2024	Unsigned	Yogi Bear
05/01/2024	Unsigned	Yogi Bear
05/15/2024	Unsigned	Yogi Bear
05/01/2024	Unsigned	Yogi Bear
05/01/2024	Unsigned	Yogi Bear

Events missing documentation (2) <small>(i)</small>			
05/23/2024 3:30 PM	Betty Boop	Therapy	Write visit note
07/03/2024 8:00 AM	Pluto Mutt	Therapy	Write visit note

Open support messages (0)

You don't have any open support messages.

Home Screen: Open Support Messages

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- [Ambiki.com](#)
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Boop, Betty	7 days	5
Mouse, Mickey	N/A	1

Alerts (11) [View all](#)

●	Review (custom)	Yogi Bear	Complete ✓	Silence ⌂
●	No active plan of care on file	Minnie Mouse	Complete ✓	Silence ⌂
●	No active plan of care on file	Daisy Duck	Complete ✓	Silence ⌂
●	No active plan of care on file	Bugs Bunny	Complete ✓	Silence ⌂
●	No active evaluation on file	Daisy Duck	Complete ✓	Silence ⌂
●	No active evaluation on file	Minnie Mouse	Complete ✓	Silence ⌂
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Documentation needing attention (50) [View all](#)

Visit notes needing attention (39)

Displaying most recent 10 - [View all](#)

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Home Screen: Notifications



Initial Set Up

Organization Settings



- **Most important items:**

- Basic Details
- Contact Information
- Locations and Facilities
- EMR Settings
- Faxing Settings

- **Guides:**

- [Update your Organization Details and Settings](#)
- [Add Facilities, Schools, & Locations to Your Practice](#)
- [Set up Faxing](#)

The screenshot displays the Ambiki user interface for editing organization settings. At the top, the Ambiki logo and a search bar are visible. Below the search bar, the breadcrumb navigation shows the path: / Organizations / Ambitious Idea Labs (Ambiki) / Edit organization. The left sidebar contains a navigation menu with icons for Home, Schedule, Caseloads, Patients, Billing, and Therapy tools, along with links to Ambiki.com, Ambiki blog, Professionals, Help center, Give feedback, Messages, and What's new?. The main content area is titled 'Edit organization' and features a 'Basic details' section highlighted with a red box. This section includes links for Contact info, Locations and facilities, EMR settings, Faxing settings, Payroll settings, Teletherapy settings, Specializations, Disorders, and Areas of intervention. To the right of the 'Basic details' section, there are input fields for 'Legal name *' (SF AMBI, LLC), 'Doing business as' (Ambitious Idea Labs (Ambiki)), 'Organization type *' (Private Practice), and 'Website' (https://www.ambiki.com/). A 'Logo' section is partially visible at the bottom right.

Personal Profile



- **Most important items:**
 - Discipline(s)
 - NPI, Credentials, and Signature
 - Supervisor/supervisee (if applicable)
- **Guides:**
 - [Set Up Your Personal Profile](#)

Personal Profile



Edit your profile Close

About me

Disciplines

Credentials

Signatures

Disciplines

Your disciplines + New discipline

Speech Therapy × Remove

- **Discipline(s)**

- To set up your discipline(s), click on disciplines in your profile
- Some organizations set up and bill **speech/language therapy** and **feeding therapy** as **two distinct disciplines**. Other organizations set up and bill speech/language therapy and feeding therapy under **just the speech discipline**. Please ensure that you decide which option is best for you and **keep it consistent** across your therapists, patients, diagnosis codes, and service rates, as they all need to match.

Personal Profile



- **NPI, Credentials, and Signature**

- The NPI in this area is your personal (rendering provider) NPI.
- The billing NPI will go under provider info and default service rates in the billing section of Ambiki.
- If there is a supervisor/supervisee relationship set up, the supervisor's NPI will override the supervisee's NPI on all billing claims.
- Make sure a signature is ACTIVE

- **Guides:**

- [Add Your Signature and NPI Number](#)

Personal Profile



- **Supervisor/supervisee (if applicable)**

- If there is a supervisor/supervisee relationship set up, the supervisor's NPI will override the supervisee's NPI on all billing claims.
- If needed, there is a setting to disable co-signatures in the Organization EMR settings

- **Guide:**

- [Add Supervisors and Supervisees](#)

The screenshot shows a settings interface with a sidebar on the left and a main content area on the right. The sidebar menu includes: EMR settings (highlighted), Faxing settings, Payroll settings, Teletherapy settings, Specializations (i), Disorders (i), and Areas of intervention (i). The main content area is divided into sections: 'Last visits' with radio buttons for 'Last visits' and 'Two date ranges' (selected); 'Print settings' with checkboxes for 'Hide your practice's logo in the PDF header' and 'Hide your practice's address / phone number in the PDF header', followed by a note: 'It is recommended that you check the above two options to ensure accurate documentation. For guidance on how to add your business information, see the documentation.'; and 'Signature settings' with a red circle icon and a checkbox for 'Disable co-signatures'.

Roles and Permissions




- The default permission groups are optimized for general function.
- You can assign permission groups to certain roles at Ambiki.
- You can also assign and remove specific permissions to specific teammates.
- **Guides:**
 - [Creation of Your Permission Groups](#)
 - [Create a New Permission Group](#)
 - [Add Permissions to Teammates](#)

Patient Profile



- **Notable Items:**

- Model - Source - Setting
- Contact Information
- Legal Guardians (if using Patient Portal)
- Authorizations
- Physician Orders
- Disciplines (need to match therapists and service rates)
- Service locations (for facility billing)
- Payment Methods
- Important notes section / Sensitive billing notes
- Settings  Tenalog and Parent-friendly summary in patient portal

Medical - Private pay - Clinic

Email address

crodriguez@ambiki.com (preferred)

Legal guardian

Charlotte Rodriguez 

- **Guides:**

- [Create a Patient Profile](#)
- [Upload Patients In Bulk](#)

Schedule



- **Notable Items:**
 - Schedule a single or recurring event
 - Set and verify attendance
- **Permissions and settings around scheduling**
 - Organization settings > EMR Settings
 - Individual Permissions for teammates regarding Schedule

Schedule

- Allow employees to edit events assigned to them
- Disable all event emails except those that are part of the patient portal

This setting prevents event emails from being sent to participants and guardians that haven't signed up to the patient portal.

Schedules

 User can **Manage** all Schedules for the Organization [Ⓞ]





Billing Set Up

Billing Page in Ambiki

A screenshot of the Ambiki Billing page. The page is titled "Organization billing settings" and "Patient billing". The left sidebar contains navigation options: Home, Schedule, Caseloads, Patients, Billing (selected), Therapy tools, and Teletherapy beta. Below these are links for Ambiki.com, Ambiki blog, Professionals, Help center, Give feedback, Messages, and What's new?. The main content area is divided into two sections: "Organization billing settings" and "Patient billing".
Organization billing settings
- **Provider info and service rates**: Manage your practice's billing details for electronic claim submission and set practice service rates. [Go]
- **Insurance companies**: Add, manage, and set specific service rates for insurance companies your practice participates with. [Go]
- **Stripe account and settings**: Manage Stripe billing settings for online private pay collection. [Go]
- **Locations and facilities**: Manage service rates for your locations and facilities. [Go]
- **EDI claim settings**: Manage connection details with Ambiki for EDI files. [Go]
- **EDI enrollment**: Request an enrollment from Ambiki staff to update your EDI settings with an insurance company you do business with. [Go]
- **Billing treatment modifiers**: Manage site billing treatment modifiers, used in EDI claim files. [Go]
Patient billing
- **Treatment reports**: Check treatment reports and claim statuses. [Go]
- **Patient invoices**: View patient invoices. [Go]
- **Patient invoice payments**: View patient invoice payments. [Go]
- **Superbills**: View patient superbills. [Go]

- **Guide: Billing Guide**

Getting Started



Provider info and service rates

Manage your practice's billing details for electronic claim submission and set practice service rates.

Go

Insurance companies

Add, manage, and set specific service rates for insurance companies your practice participates with.

Go

Stripe account and settings

Manage Stripe billing settings for online private pay collection.

Go

- **Guides:**
 - **How to Add Billing Provider Information and Default Service Rates**
 - **Set Up Insurance Companies You Work With On Ambiki**
 - **Set Up A Private Pay Source/Stripe**

Tip for Default Service Rates



Edit service rate: 92507: Individual Speech Therapy (IT)

Discipline * Start date *

Rate * ⓘ Billed by * ⓘ Billing code

If billing is based on time, please enter the hourly rate.

Location type ⓘ

+ Add treatment modifier ⓘ

+ Add pay rate

- When adding a speech therapy service rate (an untimed code), please ensure that you are billing by unit and not by time.
- When adding your default service rates, please leave the location type blank.



Billing Workflow

General Billing Workflow



The screenshot displays the Ambiki software interface. On the left is a navigation sidebar with options: Home, Schedule (highlighted), Caseloads, Patients, Billing, Therapy tools, and Teletherapy beta. Below these are links for Ambiki.com, Ambiki blog, Professionals, Help center, Give feedback, and Messages. The main area shows a calendar for April 2024. A pop-up window titled "Susan QA tx" is open over the event on Monday, April 1st, 12:05 PM. The pop-up contains the following information:

- 🕒 Apr 1, 2024 · 12:05 PM – 12:25 PM
- Weekly 12 times on Mondays
- 📄 In-person (Therapy)
- 👤 Patients (1) Check-in ▾ Attendance ▾
- 👤 Susan QA

A red arrow points from the "Attendance" dropdown menu in the pop-up window towards the right side of the screen.

From the schedule, click on the **event**. Take **attendance**.



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Create your visit note, by clicking on the **note icon** on the event.

Note: You will only be able to access this icon after the start time of the event.

General Billing Workflow



Visit note was successfully created. ✕

☰ Visit note - Susan QA: 04/01/2024 at 12:05 PM EDT View patient progress **Actions** ▾

Speech Therapy (ST)

Patient name	Date of birth / age	Grade level
Susan QA	02/25/2011 (13 years old)	N/A
Therapist name	Physicians on file	Sex at birth
Susan Mason	N/A	Female
Insurance / Payer type	Insurance ID	Diagnosis codes
Self: Susan QA (Sequence: 1)	N/A	1. F80.1 - Expressive Language Disorder

MSS ⓘ

Medical - Private pay - Clinic

Note

Red arrows point to the 'Actions' dropdown menu and the 'Billing' option within it.

Write the note, save it, then click **actions** and **billing**.

General Billing Workflow



Billing details ×

Location type *

(11) Office ×

Services

Billing code *	Units *	Duration *
92507: Individual Speech Therapy (IT) ✓	1 ✓ units	20 ✓ minutes

+ Add service

× Cancel Save billing data

Confirm the details and click **save billing data**.

General Billing Workflow



Last Step: Review your visit note and **sign** it

Note: Once you sign your visit note, no changes can be made to the note or the billing associated with it. You will be able to make amendments or invalidations, but will not be able to directly edit a date, time, or typo.



General Billing Workflow

Patient invoices

+ Add a patient invoice

	Date of invoice	DOS (invoice items)	Patient	Payer	Total	Expected amount	Payment	Write-off	Remaining balance			
⊕	04/16/2024	04/08/2024	Susan QA	Private pay	\$20.00	\$0.00	\$20.00	\$0.00	Paid in full	PDF	View	
⊕	04/16/2024	04/01/2024	Susan QA	Private pay	\$20.00	\$0.00	\$0.00	\$0.00	\$20.00	\$ Add payment	PDF	View
⊕	04/15/2024	04/09/2024	Susan QA	Private pay	\$20.00	\$0.00	\$20.00	\$0.00	Paid in full	PDF	View	

Invoices will be generated to which you can add payment

General Billing Workflow



- Invoices will be created for all active payment methods
- All payment methods must be active and in the correct order before you bill for services (primary insurance, secondary insurance, cash/credit card, etc.)
- Guides:
 - [How to Add A Payment Method For Patient Responsibility](#)
 - [How to Create a Multi-Payer Claim For Primary and Secondary Insurance](#)



Clinical Documents



Evaluations and Custom Forms

- Standard Evaluation Forms and Custom Forms Available
- After creating a custom form, be sure to publish the form
- Be sure to update permissions and settings to ensure appropriate form selection
 - Organization settings > EMR Settings
- Guides
 - Evaluations - [Create an Evaluation](#)
 - Custom Forms - [Create a Custom Form](#)

EMR settings

General

- An active, signed evaluation must exist for a patient before starting a plan of care (POC)
- An active, signed plan of care (POC) must exist for a patient before starting a visit note
- Remove the option to create visit notes and evaluations directly from the patient profile
 - This setting requires users to initiate these actions only through events on their schedule.
- ICD-10 diagnosis codes should be marked as 'suspected' unless they are derived from an evaluation or re-evaluation
 - This setting adds the suspected status to diagnosis codes for a patient until it is included in a signed evaluation.
- After an initial evaluation, any future ICD-10 diagnosis code changes can only come from a re-evaluation
 - This setting disables the ability to add/update diagnosis codes from the patient profile after the initial evaluation is signed.



Plan of Care

- Plan of Care and Tracking is available in Ambiki
- progress tracking is designed to **reduce** not **replace** data collection. Some manual adjustments may be necessary.
- Permissions and settings for the Plan of Care can be found in Organization settings > EMR Settings
- Guides
 - Create a Plan of Care
 - What is Special About Progress Tracking
 - How to Use Progress Tracking

The screenshot shows the Ambiki web interface for editing organization settings. The left sidebar contains a navigation menu with options like Home, Schedule, Caseloads, Patients, Billing, Therapy tools, and Teletherapy. The main content area is titled 'Edit organization' and lists various settings categories: Basic details, Contact info, Locations and facilities, EMR settings (highlighted), Faxing settings, Payroll settings, Teletherapy settings, Specializations, Disorders, and Areas of intervention. The 'EMR settings' section is expanded to show 'General' settings, which include three checkboxes: 'An active, signed evaluation must exist for a patient before starting a plan of care (POC)', 'An active, signed plan of care (POC) must exist for a patient before starting a visit note', and 'Remove the option to create visit notes and evaluations directly from the patient profile'. The first two checkboxes are highlighted with a red box. Below these are two descriptive paragraphs for the first two settings. Further down, there are sections for 'Patient portal' and 'Patient profile'.

Visit Notes



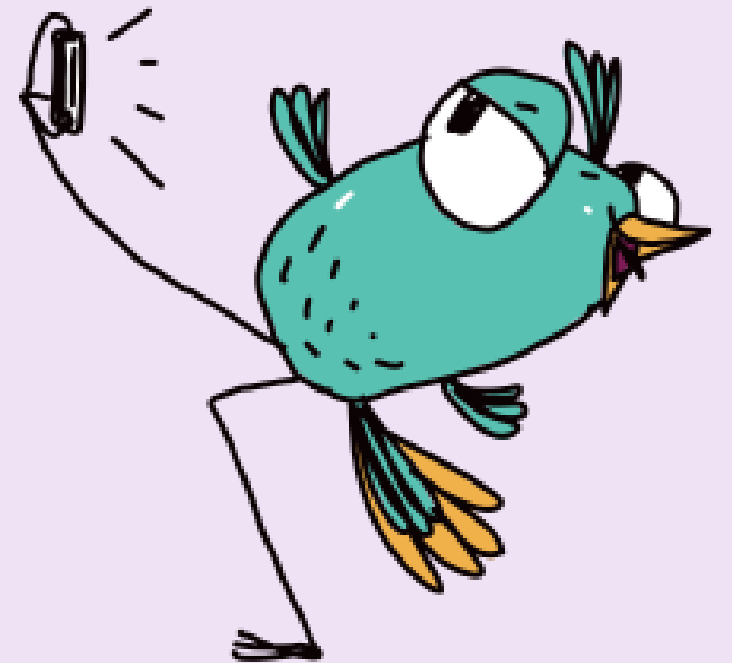
- There are different note types in Ambiki (e.g., SOAP, DAP, free text)
 - You can choose between the different note types
 - You can choose a default note type in your user settings
- Load prior note
 - This feature can load a previous note into the text fields of a new note
 - This feature can be disabled in Organization settings > EMR Settings

Discharges



- **Guide**

- [Create a Discharge](#)





Other Tools and Features

Caseloads

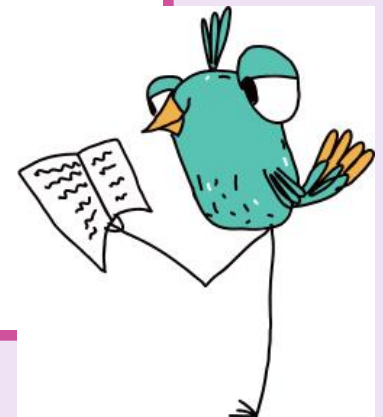


- **Guides**
- Create a Caseload
- Edit, print, or delete a Caseload
- Customize Caseload Display

Caseloads

Select the columns you would like to appear when viewing a caseload for your organization.

- Image
- Date of birth
- Age
- Active
- Discipline
- District
- School
- Last session
- Next session
- Sessions scheduled over next 3 months
- Date of last evaluation
- Active POC end date
- Pay type
- IEP frequency
- IEP period visits
- IEP period visits remaining
- Avg. pace
- Pace indicator
- Alerts
- Create visit note (button)
- Create event (button)
- View active POC (button)





Caseloads

- Caseloads can serve multiple purposes (e.g., to separate patients by therapist, or to separate patients by location)
- Therapists can manage multiple caseloads.
- Patients can be on multiple caseloads.
- Use permissions to restrict therapists from accessing each other's caseloads (if desired)
 - If supervisors and supervisees share patients, ensure they have the same caseloads when this setting is enabled.
 - You can easily do this by cloning a caseload

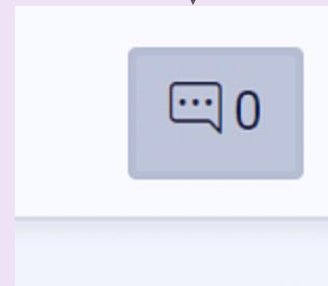
School	Last session	Next session	Date of last evaluation	Pay type	IEP frequency	Avg. visit pace	visit note	Event
Seaside Elementary	04/17/2024	04/18/2024 at 12:00 PM	04/14/2024	Seaside Elementary Private pay	5Wx30ST	-3.0		
N/A	04/04/2024	N/A	04/15/2024	N/A	N/A	N/A		
N/A	08/30/2023	N/A	07/05/2023	N/A	N/A	N/A		
Alpha Elementary	08/30/2023	04/19/2024 at 8:00 AM	04/14/2024	N/A	N/A	N/A		
Calle Mayor Middle	04/09/2024	N/A	03/21/2023	N/A	N/A	N/A		



Commenting and Tagging

Look for this box on the top right-hand corner of clinical documents

- Ambiki includes a Comments section in clinical documents for internal notes.
- Users can tag teammates for collaboration using the @ symbol.
- Tagged users receive notifications.
- Comments remain separate from the clinical document.
- Users can also tag teammates in the replies of Support Messages, allowing the owner of the message and the tagged user(s) to see and reply.
- Guide:
[Comments and Tagging Teammates](#)



Alerts

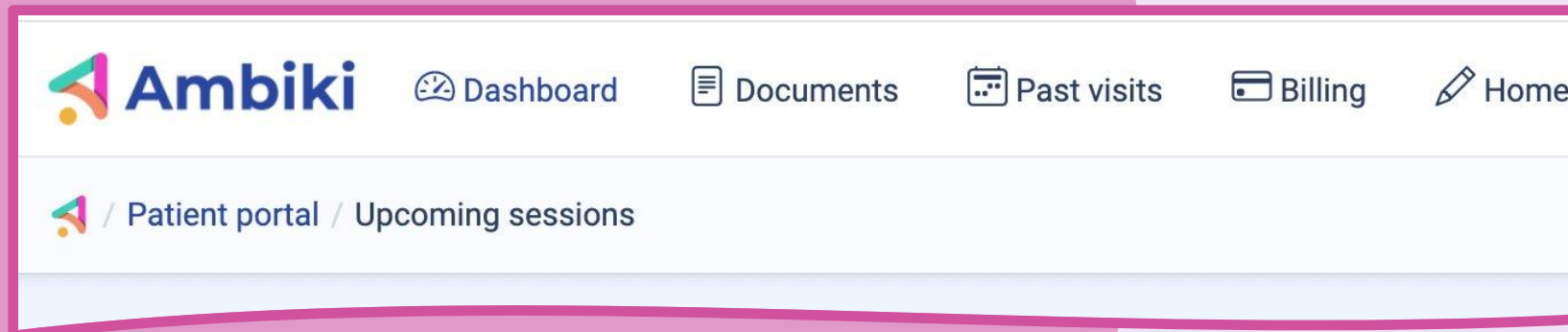


- Automatic alerts are generated around authorizations and evaluations
- You can also create custom alerts
- Guide:
 - [Alerts in Ambiki](#)



Patient Portal

- A **legal guardian** (not just email address) must be on file to invite a parent/patient to the portal
- Documentation and parent-friendly summaries can be added
 - Sending all clinical documents to all patients in the patient portal is controlled at organization-level settings
 - Sending parent-friendly summaries to the patient portal is controlled per patient in the patient's settings
- Guides:
 - [Parent-Friendly Summaries](#)
 - [6 Additional Guides/Help Articles About The Patient Portal](#)



Additional Resources



- Help Center: [Ambiki FAQ](#)
- EMR User Guide: [EMR Guide](#)
- Billing User Guide: [Billing Guide](#)