

CAREPATRON

EXTENDED PROFILE

OVERVIEW

Carepatron is a customizable, all-in-one EHR and practice management software designed to anticipate practitioners' needs, organizing the layout and placing features to simplify tasks such as securely storing documents, integrating with other tools, and streamlining clinical documentation

CAREPATRON APP

The Carepatron app is a mobile-friendly extension of the platform, designed for healthcare professionals who need on-the-go access to patient data, appointment schedules, and clinical tools. Compatible with both iOS and Android devices, the app enables providers to deliver quality care without being tied to their desks. Patients can also use the app to access the patient portal, enhancing communication and engagement.

IS CAREPATRON HIPAA COMPLIANT?

Yes, Carepatron is fully HIPAA, GDPR, PIPEDA, and SOC 2 compliant, ensuring that all patient data is securely stored and shared in accordance with federal regulations.

This carries over to Carepatron AI, which generates instant, accurate answers based on context from any work within and connected to the software. Practitioners can transcribe and summarize, generate SOAP notes, and personalize client care through treatment templates, error-free.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Carepatron
ADDITIONAL INFORMATION	
IOS APP	✓
ANDROID APP	✓
MULTI-OFFICE	✓
WEB APP	✓
COMPLIANCE	
HIPAA	✓
ICD-10	✓
CPT	✗
HL7	✗
SPECIALTY	
ALLERGY AND IMMUNOLOGY	✗
ANESTHESIOLOGY	✗
BARIATRICS	✗
CARDIOLOGY	✗
COMMUNITY HEALTH CENTERS	✗
CORRECTIONAL HEALTH	✗
DENTISTRY	✗
DERMATOLOGY	✗
DIALYSIS CLINIC	✗

ENDOCRINOLOGY	✗
FAMILY MEDICINE	✓
GASTROENTEROLOGY	✗
GENERAL PRACTITIONER	✗
INFECTIOUS DISEASES	✗
INTERNAL MEDICINE	✓
MENTAL AND BEHAVIORAL HEALTH	✓
NEPHROLOGY	✗
NEUROLOGY AND NEUROSURGERY	✗
OBSTETRICS AND GYNECOLOGY	✗
OCCUPATIONAL MEDICINE	✓
ONCOLOGY AND HEMATOLOGY	✗
OPHTHALMOLOGY	✗
ORTHOPEDICS AND SPORTS MEDICINE	✗
OTOLARYNGOLOGY	✗
PAIN MANAGEMENT	✗
PEDIATRICS	✓
PHYSICAL THERAPY AND REHABILITATION	✓
PLASTIC SURGERY	✗
PODIATRY	✗
PROCTOLOGY	✗
PULMONOLOGY	✗
RADIOLOGY	✗
RHEUMATOLOGY	✗
SLEEP MEDICINE AND CENTERS	✗

SPEECH THERAPY	✗
SURGERY	✗
URGENT CARE	✗
UROLOGY	✗
VASCULAR DISEASES AND PHLEBOLOGY	✗
OTHER SPECIALTIES	✓
CHIROPRACTIC	✗
PRACTICE SIZE	
SOLO PRACTICE	✓
1-10 PHYSICIANS	✓
11-50 PHYSICIANS	✓
OVER 50 PHYSICIANS	✓
SOFTWARE FEATURES	
APPOINTMENT MANAGEMENT	✓
BILLING MANAGEMENT	✓
CLINICAL WORKFLOW	✓
DOCUMENT MANAGEMENT	✓
EM CODING	✓
INSURANCE AND CLAIMS	✓
LAB INTEGRATION	✗
MEDICAL TEMPLATES	✓
PATIENT DEMOGRAPHICS	✓
PATIENT HISTORY	✓
PATIENT PORTAL	✓
REFERRALS	✓

REPORTING AND ANALYTICS	✓
SCHEDULING	✓
VOICE RECOGNITION	✓
E-PRESCRIPTION	✓
FURTHER INFORMATION	
ONC-ATCB	2014
ONC-ATCB CERTIFYING BODY	Drummond
PRICING	Free: \$0 per user/month, Essential: \$14 per user/month (billed annually), Plus: \$19 per user/month (billed annually), Advanced: \$24 per user/month (billed annually)

SOFTWARE SCREENSHOTS

Today
< >
13 Mar 2025
Week

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?
🔔
👤 Carepatron

March 2025

S	M	T	W	T	F	S
23	24	25	26	27	28	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Team members

- Sarah J
- Tom W
- David F
- Lisa K
- Ella H

Services

- Final appointment
- Art therapy session
- Therapy appointment

	Mon 10				
	Sarah J	Tom W	David F	Lisa K	Ella H
12 pm	Fraser Cane - Final Appoin 12:00 PM - 1:00 PM	Jane Smith - Final Appoin 12:30 PM - 1:30 PM	Mandy Green - Final Appo 12:00 PM - 1:00 PM	Jessica Le - Art Therapy 12:00 PM - 2:00 PM	Kathy Long - Final App 12:00 PM - 1:00 PM
1 pm	Lisa Wu - Art Therapy 1:00 PM - 3:00 PM	Alison Day - Therapy 1:30 PM - 2:30 PM	Gary Morris - Psychothera 1:00 PM - 2:15 PM		Janine Lopez - Therapy 1:00 PM - 2:00 PM
2 pm		Gary Morris - Therapy 2:35 PM - 3:35 PM	Janine Lopez - Therapy 2:15 PM - 3:00 PM	Out of office 2:00 PM - 3:30 PM	Alison Day - Therapy 2:00 PM - 3:00 PM
3 pm	Out of office 3:00 PM - 4:00 PM		Lily Rose - Final Appointm 3:00 PM - 4:00 PM		Lisa Wu - Art Therapy 3:00 PM - 5:00 PM
4 pm		Out of office 4:00 PM - 5:00 PM		Will James - Therapy 3:30 PM - 4:30 PM	
5 pm					

carepatron

Secure in-app messaging made simple
Keep conversations private – secure messaging for your clients and team

Inbox

30 Conversation

Mary Bell +2
Recent client files
Please read the client files to...

Mary George, Yessa
Learn across your website and i...

Mary Bell
Learn across your website and i...

30 Conversation

Wendy Dennis
Both @Amber and I have done our wellness plans together.

Amber
Hopefully that is okay for the partner session

It shouldn't be here. Let's discuss tomorrow at 9am. The everyone team

Client - Wendy Dennis
Katerina Petrova
Wellness Cohort
Team - Mary George, T...
Flourish Alan

Invoices

\$0.00 In Transit
\$424.00 Total Paid July
\$1,272.00 Total Unpaid July
\$954.00 Total Overdue

17 Invoices

Issue date	Invoice #	Client	Services	Price	Due date	Assigned team	Status	Date received
Jul 22, 2024	000023	Bobby Doe (Bob)	Appointment Add-on, 60 min	\$127.20	Aug 6, 2024	ME	Unpaid	
Jul 22, 2024	000024	Christopher Williams	Diagnostic Evaluation	\$106.00	Aug 5, 2024	ME	Unpaid	
Jul 19, 2024	000022	Bobby Doe (Bob)	Appointment Add-on, 60 min	\$127.20	Aug 2, 2024	ME	Unpaid	
Jul 12, 2024	000020	Christopher Williams	Diagnostic Evaluation	\$106.00	Jul 26, 2024	ME	Unpaid	
Jul 12, 2024	000019	Christopher Williams	Diagnostic Evaluation	\$106.00	Jul 26, 2024	ME	Unpaid	
Jul 10, 2024	000018	Christopher Williams	Diagnostic Evaluation	\$106.00	Jul 24, 2024	ME	Unpaid	
Jul 10, 2024	000017	Barbara Hernandez	Company Rd - Coaching Service	\$424.00	Jul 24, 2024	ME	Paid	Back received Jul 15, 2024
Jul 8, 2024	000014	Barbara Hernandez	Appointment Add-on, 60 min	\$127.20	Jul 22, 2024	ME	Unpaid	

Workflows Management

Appointment automations

Appointment automations - Email & SMS
Reduce no-shows – send automated email/SMS reminders to attendees at set intervals (e.g., 24 hours, 1 hour) before the appointment.

Recurring appointment confirmation - Email & SMS
Reduce no-shows – send automated email/SMS reminders to attendees at set intervals (e.g., 24 hours, 1 hour) before the appointment.

Reschedule appointment - Email & SMS
Keep everyone informed – send email notifications when appointments are rescheduled to avoid confusion.

Cancelled appointment - Email & SMS
Keep everyone informed – send email notifications when appointments are cancelled to avoid confusion.

Follow-up after appointment - Email & SMS
Send follow-up messages thanking clients for attending, asking for feedback, or offering next steps.

Invoice automations