

 EHR IN PRACTICE

OPTIMANTRA

EXTENDED PROFILE

OptiMantra

OVERVIEW

OptiMantra is a cloud-based EMR/EHR and practice-management platform aimed at integrative medicine, medspa/aesthetics, behavioral health, and direct/primary-care practices.

It combines charting, scheduling, billing/claims, point-of-sale, and a patient portal with optional add-ons (eRx, two-way texting, fax, and more).

WHAT OPTIMANTRA DOES

- **Customizable charting & templates:** SOAP templates, custom intake forms, and the ability to create follow-up charts from previous visits.
- **Patient portal & messaging:** Patients can self-schedule, complete pre-visit forms, view invoices/superbills, message the practice securely, and access documents.
- **Telehealth & e-prescribing:** Built-in HIPAA/PHIPA-compliant telehealth and electronic prescribing (EPCS via Surescripts/MDToolbox).
- **Practice management:** Scheduling (multi-practitioner/room/location), point-of-sale, inventory/dispensary, superbills, insurance claims, and integrated payments.
- **Reporting & billing tools:** Daily deposits, aging, insurance billing summaries, claims status, and automated EOB posting.

INTEGRATIONS & ECOSYSTEM

The platform directly integrates with major lab vendors (LabCorp, Quest, Rupa Health), eRx networks (Surescripts), payment gateways (Stripe, Fiserv, Authorize.net, Stax), Fullscript for supplements, Fitbit for activity data, and third-party tools via webhook/API. This makes it easier to keep clinical, diagnostic, and payment workflows connected.

PRICING

OptiMantra's core pricing is clear (download our extended software profile for the breakdown), but practices should audit add-on costs (eRx license, texting, insurance billing per-claim fees) against their expected usage.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	OptiMantra
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	×
ORTHOPEDECS 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	
PRICING	From \$99/month for first practitioner. \$49/month/additional practitioner and \$25/month/clinical staff member (clerical staff are free).

SOFTWARE SCREENSHOTS

Adam Rodriguez
M 09/30/1985 36 Y

Save Save & Close Back

Visit 2022-09-18 OM Wellness Center Type More Commands

Questionnaire Intake History Visual All Sections

Wheel of Balance

Please select satisfaction index (0 Low - 10 High)

Career	Money	Health	Significant Other	Fun Recreation	Personal Growth	Family/Friends	Physical Environment
7	6	5	7	5	7	6	8

Wheel of Balance

Legend: Score

Sticky Note

Patient has a dog, lives near the coal plant

Vital Immunity

1 capsules null [from Wellevate]

1 capsules null [from FULLSCRIPT]

Vitamin D3 10,000IU

1 Softgels null [from FULLSCRIPT]

ZYRTEC ALLERGY

Supplements

5-HTP, 100 mg A-F Betafood 360 Tablets

A-F Betafood 90 Tablets Adrenal Support

Ashwagandha Betacol 40 Capsules

Betafood 90 Tablets Betaine HCl

Clinical Profile

Blood Group: A+

Smoking (Past): Yes, Smoking: No

Herb/Drug Allergies: **CODEINE SULFATE**

Food Allergies: Nuts, Gluten

Dietary Restrictions: Vegan, Gluten

Immunization: Polio, Tetanus shot, Haemophilus influenzae, Pneumococcal infections

Personal and Family History:

Self: **Chemical Sensitivity**, **High cholesterol**

Allergies

Life-style

Existing/Current Drugs/Medications/Supplements

Ace Demo
 F 01/01/1982-A2-Y
 Visit: 2022-09-18 | OM Wellness Center | Type: | More Commands

Questionnaire | Intake | History | Visual | All Sections | X | X W

Acupuncture Tongue and Pulse Diagnosis 1 Tongue Body Color (Dark red | 2 Tongue Body Shape (Swollen, Enlarged)

Tongue Body Color

Pink or Light Red
 Purple
 Red body
 Red tip
 Scarlet
 Dark red
 Pale
 Green

Tongue Body Shape

Stiff
 Falcid
 Swollen
 Enlarged
 Swollen
 Hammer
 Swelling on left
 Swelling on right
 Swelling on both
 Swollen between tip and central surface
 Swollen edges
 Swollen front
 Swollen tip
 Short and contracted
 Long
 Thin

Tongue body features

Rough or tender texture
 Red spots
 White spots
 Black spots
 Ulcerated
 Numb
 Loose
 Deviated
 Wiggling
 Rolled
 Teeth marks
 Sore covered

Tongue Body Moisture Dry Wet NA Tongue coat root Root No Root NA
 Tongue Coating White Yellow Gray Black NA Tongue Coat Thickness Thin Thick NA
 Tongue body cracks Horizontal Vertical Transverse NA

Custom Formulations

Add New Custom Formulations | Injection Sites | Formulations Notes Templates | HSB

Date Filter: Last 30 Days Refresh

Date	By	Name	Type	Edit
2021-10-22	Dr. Harrison Ford	Myers Basic Add to Assessment Or Add to Plan Add to Services Notes: four ingredients Ingredients: Sterile water[500.0],Magnesium Chloride [2.5],Ascorbic	IV	Edit Copy
2021-10-18	Dr. Harrison Ford	Myers Basic Add to Assessment Or Add to Plan Add to Services Notes: four ingredients Ingredients: Sterile water[500.0],Magnesium Chloride [2.5],Ascorbic	IV	Edit Copy

Home | Medications & Supplements | Documents & Handouts | Messages | Treatment Plans | Superbills | Manage Appointments | Health Apps | Logout

Demographic Details | Combined Consent

Demographic, insurance and payment information | Consent Form Or Agreement

Not Completed | Updated 02/15/2023

HEPA Privacy | COVID Consent Prior To Visit

Dear Stephen,

This is a friendly reminder from Joe Medic, NP that your appointment is at 10:30 am Thursday, January 25

Please confirm your appointment by clicking [on this link](#).
 Or call 123-151-2312 as soon as possible to make any changes.

In advance of our visit, please complete your paperwork by logging into our secure and HIPAA compliant patient portal (from our partner OptiMaster)

- Please click on [this link](#) to complete your paperwork
- If this is your first time logging in to the patient portal, please click on the "New Sign Up" button to set your initial password.
- A link will be sent to this email that will allow you to create a password and then sign on to the portal.
- The portal will provide you access to your e-prescriptions, treatment plans, billing information, and more; you will also be able to request future appointments through the portal.