

PROVIDERSOFT  
New York EI Agency

# EI Billing Software Buyer's Guide

*What to look for. What to ask. What to avoid.*

Trusted by agencies managing 40% of NY EI claims

## What Every NY EI Agency Owner Should Know Before Evaluating Software

Switching software is not easy. It is not quick. And it does not happen in the background while your agency keeps running smoothly. It means migrating data, retraining your billing team, onboarding every provider to a new app, rebuilding your workflows, and managing the entire transition while still serving families, meeting compliance deadlines, and getting claims out the door.

For most agency owners, that reality is exactly why they stay on a system they have outgrown. The pain of switching feels bigger and more certain than the pain of staying. That calculation makes sense -- until you add up what staying is actually costing you. In denied claims. In hours your team spends on work the software should handle. In compliance exposure that does not surface until an auditor is sitting across the table from you.

The agencies that made the switch and came out stronger on the other side did not do it because it was easy. They did it because they found a partner who made the process structured, supported, and survivable -- and because they were honest with themselves about the cost of not switching.

That is what this guide is for. Not to tell you switching is painless. But to make sure that if you do it, you do it once, you do it right, and you end up on a platform that earns the disruption.

**The question is not whether switching is hard.**

It is whether the cost of staying is harder. Most agencies that do the math are surprised by the answer.

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## Why This Guide Exists

Most New York EI agencies don't fail because of bad clinical care. They fail or stay stuck because of billing. Missed authorizations. Rejected claims. Manual processes that eat 40+ hours a month and leave providers buried in paperwork instead of with families.

Choosing the right EI software is one of the most consequential decisions an agency owner makes. The right system protects your compliance, accelerates your revenue cycle, gives your team back their time, and scales with you as you grow. The wrong one quietly costs you in ways that don't show up until an audit, a denied claim, or a billing manager who burns out.

This guide gives you the exact framework NY EI agency owners, billing managers, and clinical directors use to evaluate platforms so you know what questions to ask, what answers to expect, and what red flags to walk away from.

### The NY EI Reality Check

NY EI agencies lose an average of \$40,000/year to preventable billing errors. That's not a cash flow problem. It's a software problem. The agencies that have closed that gap aren't working harder. They chose the right system.

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## Section 1: The 8 Things That Make EI Software Worth What You Pay For

Not all EI software delivers equally. These are the eight capabilities that define whether a platform is truly built for the way NY EI agencies operate, and where the questions you ask in a demo will tell you everything you need to know.

### 1. State and City Forms -- Included and Kept Current

ProviderSoft provides all NY state and city forms at no additional charge and updates them as soon as we learn of any change, whether from the state directly or from a client in the field. Your team should never be in the position of tracking regulatory updates manually or waiting on a vendor to deliver a form that should already be in your system.

- **Ask:** When a state or city form is updated, how do I get the new version? Is there a lag? Is there a charge?
- **Watch for:** Software that does not update forms proactively or does not offer custom form building.

### 2. Case Management

ProviderSoft automatically stores all session notes and documents to each child's individual folder, with filters and sorting built for audit readiness. When an auditor walks in, everything is organized by child, provider, and document type and ready to retrieve in seconds. Every step of a child's journey from referral to service delivery is tracked in one place, giving your team full visibility without hunting across systems or shared drives.

- **Ask:** How are session notes and documents organized per child? Can I filter and sort for audit preparation?
- **Watch for:** Software that stores documents in a flat, unorganized folder with no child-level structure or by authorization number.

### 3. Reporting

ProviderSoft includes 15+ standard reports out of the box, including a Potential Revenue report and a Service Delivery Ratio report that give leadership real-time visibility into where the agency is performing and where revenue is at risk. Beyond the standard library, our self-serve custom reporting wizard lets you build and save your own reports around whatever you want to track, without waiting on anyone. Your reporting capability should be in your hands, not on someone else's schedule.

- **Ask:** What reports come standard? Can I build custom reports myself, or do I have to request them?
- **Watch for:** Software where custom reporting means submitting a request and waiting on the vendor to deliver it.

### 4. Compliance Alerts and Credential Tracking

ProviderSoft flags expiring provider credentials and certifications before they become expired, and sends automated alerts for overdue progress reports and incomplete documentation before they become citations. Our HR and staffing module includes full credential tracking with automated alerts, document storage, and multi-criteria provider search so your team always knows where every provider stands.

- **Ask:** What compliance alerts does the system send automatically? Who receives them? What triggers them?
- **Watch for:** Any software that requires you to still track credentials manually or in spreadsheets and does not automate this for you.

### 5. Data Security Certification

SOC 2 Type 2 is the gold standard for data security in software platforms that handle sensitive information. It means an independent auditor has examined the platform's security controls, not just at a point in time, but over an extended period, and verified that those controls are operating effectively and consistently. ProviderSoft is SOC 2 Type 2 certified. When you're entrusting a platform with child records, provider data, and billing information, that certification matters. Ask any vendor you evaluate to produce their documentation. If a vendor does not hold recognized data protection certification, you should seriously reconsider whether they are the right partner for your agency.

- **Ask:** Can you provide your SOC 2 certification documentation?
- **Watch for:** Any vendor who delays, hedges, or cannot produce certification on request.

### 6. Payroll Export and Provider Pay

ProviderSoft ties provider payroll directly to logged session notes. Fee-for-service payroll is calculated from what was actually delivered and documented, with structured exports formatted for ADP, QuickBooks, and Paychex. Your payroll process should be driven by what the system already knows, not by someone re-entering data from a PDF every two weeks.

- **Ask:** How does provider payroll connect to session notes? Is the export structured for my payroll platform, or is it a generic PDF?
- **Watch for:** Software where payroll reconciliation still requires manual re-entry each cycle.

## 7. Implementation, Support, and Who You're Actually Working With

ProviderSoft's implementation runs 6 months, with a dedicated team that stays with you throughout. Our support operates within defined windows by severity level, with a ticketing system and team coverage so your billing is never dependent on one person being available. After the structured onboarding period, you transition to a dedicated account manager who knows your agency.

Our team includes EI industry veterans who have worked inside agencies. When you have a question about how to handle a denial pattern, structure a workflow, or scale your operation, you're talking to someone who has done it, not just someone who knows the software. That consultative support is particularly valuable for agencies that are new or in a growth phase.

- **Ask:** Who handles implementation? How long does the structured support period last? Who is my contact after go-live?
- **Ask:** Does your team have people who have actually worked in EI agencies, not just in software?
- **Watch for:** Any vendor where support coverage depends on a single person's availability.

## 8. Telehealth and Remote Signature Workflows

ProviderSoft includes an email-based remote signature workflow for telehealth sessions, capturing parent signatures without requiring an in-person interaction. For any agency delivering telehealth at scale, parent signature capture is a compliance requirement -- not a workaround. Make sure your platform has a built-in, documented solution for it.

- **Ask:** How does the system handle parent signature capture for telehealth sessions?
- **Watch for:** Software that supports telehealth billing but leaves signature collection as an unsolved problem outside the system.

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## Section 2: The Evaluation Checklist

Use this in every demo. Don't let vendors skip questions or redirect to features. A direct answer tells you more than any product tour.

Evaluation Question	ProviderSoft
Are all NY state and city forms included at no extra charge?	✓
Are form updates provided as soon as a change is identified?	✓
Are session notes and docs auto-stored to each child's folder?	✓
Is document retrieval organized and audit-ready?	✓
Are 15+ standard operational and financial reports included?	✓
Can I build my own custom reports via a self-serve wizard?	✓

Does the system send automated credential and compliance alerts?	✓
Are Provider expiring credentials flagged before they lapse?	✓
Is SOC 2 data security certification confirmed and documentable?	✓
Is provider payroll automated from logged session notes?	✓
Is the payroll export structured for my payroll platform?	✓
Is implementation structured and supported for 6 months?	✓
Does the support team include EI industry veterans?	✓
Is there a dedicated account manager post go-live?	✓
Is telehealth remote signature capture supported?	✓
Can the system scale to CPSE, ABA, or multi-program?	✓
Does the company add new features often?	✓

#### How to use this:

Bring this checklist to every demo. Fill in how each vendor answers. If a vendor can't answer a question directly, write "no answer" -- that's an answer too.

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## Section 3: The Total Cost of Ownership Trap

The monthly price on a proposal is not the cost of the software. It's the cost of the software when nothing goes wrong. Here's how NY agencies get burned by low sticker prices.

### The Per-Note Pricing Cliff

Some billing models advertise a low entry price but charge per session note submitted. At low volume, the number looks manageable. At 2,000 notes/month you're paying \$1,000 just in note fees. At 5,000+ notes/month you're at \$2,500/month in session notes alone, before anything else.

Before you sign: ask the vendor to show you their pricing at your current note volume and at 2x your current volume. The math changes fast.

### The Rebill Tax

Some billing models charge again when a claim is rejected and resubmitted. Denial rates of 5 to 15% are common in NY EI. If you're paying per claim on the original submission and again on every rebill, your effective cost per claim is meaningfully higher than quoted.

- **Ask:** Are resubmissions charged at the same rate as original claims?

## The Hidden Labor Cost

Manual processes have a price. If your billing manager spends 15 hours a month chasing therapist signatures, re-entering payroll data, and tracking down missing documentation, that's real labor cost that software should eliminate. Creative Wonders, a NY EI agency, was spending \$40,000/year in billing staff time before implementing ProviderSoft. That work is now handled automatically.

## The Audit Cost You Haven't Had Yet

One NYSDOH audit citation for missing or disorganized documentation can cost more than a year of software fees. Agencies without organized, audit-ready document storage are carrying an unquantified liability. The question isn't whether an audit will happen. It's whether your system is ready when it does.

## The Reporting Gap Tax

Agencies running on limited reporting aren't just missing visibility. They're missing revenue. Without a Potential Revenue report, you don't know what you're leaving on the table. Without a Service Delivery Ratio, you can't see where your providers are underperforming against authorizations. In NY EI, these aren't nice-to-haves. They're the difference between a growing agency and one that's stagnant.

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# Section 4: What NY EI Agencies Need to Know About Switching

The number one reason agencies stay on a system they're not happy with: fear of the switch. Here's what a structured migration actually looks like.

## What a Structured Migration Covers

- Historical data migration: claims, child records, provider files
- System configuration: authorization rules, rate tables, compliance settings
- Provider onboarding: app setup and training for your therapist team
- Billing team training: workflows, reconciliation, denial management
- Go-live support: dedicated support continues after go-live to ensure success

## The Real Timeline

Agencies can typically begin billing at the 12-week mark. From there, ProviderSoft stays with you through a full 6-month structured support period. After that, you transition to a dedicated account manager who knows your agency and is there when you need them.

### What 365 Kids Did

365 Kids started with ProviderSoft in January 2024, processing 499 claims per month out of

EI-Hub and spending 2 to 3 hours per child each billing cycle. By July 2025, they were processing 3,887 claims per month. The same small billing team. No additional overhead. When EI-Hub authorizations shifted suddenly, they corrected claims without voiding or restarting. Their growth wasn't luck. It was infrastructure.

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## Section 5: Red Flags to Walk Away From

These are the signals that should end a conversation, or at minimum, prompt a much harder set of questions before you sign anything.

- ❌ State or city form updates require a support ticket or come with a fee
- ❌ No proactive form updates and no custom form building
- ❌ Reports require requesting from the vendor with no self-serve option
- ❌ Documents are stored by authorization number, not by child with no child-level structure
- ❌ SOC 2 data security certification cannot be confirmed or produced on request
- ❌ Provider credential and certification tracking is manual or spreadsheet-based
- ❌ Payroll export is not structured for your payroll platform
- ❌ Charges for claim resubmissions and rebills
- ❌ Support coverage depends on a single person's availability
- ❌ Implementation is short or ends at go-live with no structured follow-on support
- ❌ No telehealth remote signature workflow
- ❌ Cannot scale beyond EI to CPSE or multi-program
- ❌ No new development or features

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### Ready to See It in Your Agency?

ProviderSoft works with agencies managing 40% of NY EI claims. We'd be glad to show you exactly how we'd handle your specific setup, billing volume, provider count, and compliance requirements included.

**Book a 20-minute discovery call:**

[\[NY Landing Page URL\]](#)

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