e-Medsys

Release Notes Version 12.00

Billing Module

- New in Version 12.49 A new ACTIVE checkbox has been added in User File Maintenance. To inactivate a user, highlight the user, click on Modify, uncheck the ACTIVE box, and click **OK**. Once the ACTIVE box is unchecked, the user will no longer be able to log in to the system, and will no longer show in the user panel. Uncheck the ACTIVE box to view the inactivated users.

- New in Version 12.48 The system now has the ability to assess **Finance Charges**. They are assessed based on the delinquent days and delinquent amount, entered in each Financial Class. To set up finance charges, start in the Company file and click on the tab labeled Finance Charges. Complete the finance charge percentage rate, the minimum charge amount, and enter the "dummy" finance charge procedure code. Complete check box to assess finance charge on past due payment plans if needed.

  To Run Finance Charges in TEST MODE: Click on the FILE Icon in the main menu, click on Trace Level, click on Trace Level 1, click SET. Go to the Billing Icon, Posting, Finance Charges. Click on Financial Class Tab, and select the appropriate Financial Classes. To choose more than one, hold down the Ctrl Key and highlight the appropriate Financial Classes, click **OK**. This will produce a report for review. After reviewing the report run the Finance Charges in Production Mode.

  To Run Finance Charges in PRODUCTION MODE: Click on the FILE Icon in the main menu, click on Trace Level, click on No Trace, click SET. Go to the Billing Icon, Posting, Finance Charges. Click on the Financial Class Tab, select the appropriate Financial Classes, click **OK**. This will produce a report that will list all of the Finance Charges that were posted to the patient accounts.

- Version 12.47 Future appointments now print on statements. A new checkbox has been added to the Statement Control file to enable this feature.

- Version 12.47 When a monthly billing statement prints a patient note that has been marked as a STATEMENT ONCE type of note, the note's status will now automatically change to STMT PRINTED after the statement prints.

- Version 12.46 There has been a new totals page added to the Provider Productivity Report. This additional page will display department totals for all providers. Department Totals are shown month-to-date and year-to-date format.

Release Notes Version 12.00

- Version 12.43 In the Credit Posting screen if a period is entered in the Check Number field, the numbers previously entered in the Check number field, the ABA1 and the ABA2 field will be repeated in those fields, placing the cursor in the amount field.

- Version 12.42 When running the Procedure and Diagnosis Report you are now able to select multiple procedures and/or Diagnoses from the selection panels. To select multiple procedures and/or diagnoses, hold down CTRL key on the keyboard and highlight the selected procedures and/or diagnoses.

- Version 12.42 When adding a Patient Note, the patient name and account number are displayed on the Patient Note Screen.

- Version 12.33 Charge Ticket File Maintenance now has a new button labeled "SIGNATURE SETTINGS". When this button is clicked, the user will be able to customize the signature boxes that print on the Charge Ticket. The current signature messages will remain the default unless the user wants to change them by typing in their own message.

- Version 12.33 A new selection item was added to the Claims Tab in Insurance Processing. The new item is labeled "Daysheet Cut-Off Date". If a date is specified in this field, a claim will only be generated for a particular charge, if that charge has a daysheet date that is equal to or prior to the daysheet cutoff date specified.

- Version 12.30 In Financial Class File Maintenance there is a new checkbox labeled "Commercial Account". During Charge Posting, if the patient's primary insurance financial class is "Commercial" once a charge is ACCEPTED, the General Comment line will display allowing the user to enter the employee's name and social security number. When statements are printed they will display the information entered into the General Comment field.

- Version 12.26 The system will now allow you to retrieve a patient in any screen by using the Westland generated insurance claim number. By preceding the claim number with the letter "c" (without the apostrophes) in the account number field the patient account will be retrieved. This feature is especially useful in the Credit Posting screen when posting from an insurance EOB that only gives the Westland generated insurance claim number on the EOB.

- Version 12.23 The system now has the ability to do "FROM-THRU" posting. In Procedure File Maintenance a new check box has been added. If a procedure needs a "FROM-THRU" date click to check the box accordingly. During the charge posting process, if a check marked procedure is posted, the system will prompt you for the ending date of service. The ending date of service field is located on the "RELATED DATES" tab in Charge Posting.

- Version 12.21 In Credit Posting the user now has the ability to post a payment or an adjustment to any transaction on an account. A new radio button has been added to the credit posting screen. This radio button is labeled "ALL". When this radio button is clicked all services will be shown in the credit posting screen, even those transaction with a zero remaining amount. This will allow for the posting of a payment or adjustment to a previously paid transaction. The radio button labeled "ALL-Open" will show only those transactions that have a remaining balance.

- Version 12.18 After clicking the OK button in the Insurance Billing and Statement Billing Screens, a secondary confirmation window has been added to the system. This window will prompt the user to confirm that they are ready to begin processing statements or insurance claims.

- Version 12.18 In the Inquiry Screen the payment detail screen will now show the claim date and claim ID# that are on the credit audit.

- Version 12.18 The system now has a batch-posting feature. This feature will allow a user to have multiple open posting batches available at one time. For example: one batch for posting a large Blue Cross EOB and another batch for patient payments. Theses batches can now be cleared printed and reprinted separately. You also have the ability to associate a posting location (Department) to a batch, and can print and/or close multiple batches associated with that location (Department).

- The Batch Window will appear in: Charge Posting, Credit Posting, and Reversal Posting. The Batch Window will show all open batches assigned to that user and will give the user a chance to open a NEW BATCH or post to an existing batch. If there are no open batches, the system will automatically open a batch and place the user's name in the batch description. The user can complete the description field with a specific name for each batch. To accept the batch, click the OK button. To open a new batch, click the NEW BATCH button. If you are in a posting session and want to switch to another batch or open a new batch, click the BATCH button on the button bar. In the batch window you will have the ability to see the totals of the batch during posting.

- Daysheet/Deposit Report: If a user has only one batch open at a time, the way to run a daysheet will not change. When selecting on the USER/BATCH selection tab, a list of all open batches will be seen. When selecting an individual user, the system will present a list of all open batches for that user. If you only want to print/clear one of the batches, click on the appropriate batch and proceed as usual. This will also be true when reprinting a previous days batch. The system will show all batches for the selected date range for the selected user.

- New Selection Options: A user can now select on Batch Location. A user can also select from a list of open batches and choose what batch to balance and clear. We have also added the ability to reprint the daysheet based on batch location and the date the original daysheet was cleared. We have also added the ability to reprint the daysheet selecting from a list of batches based on the original daysheet clear date.

- PLEASE NOTE: THE UPDATE AUTOMATICALLY CREATED OPEN BATCHS FOR ALL USERS, FOR ALL TRANSACTIONS THAT HAVE NOT BEEN CLEARED ON A DAYSHEET.

- Version 12.12 In Credit Posting the charge transaction line will now show the short name of the department and the short name of the physician in one column. The Procedure and Diagnosis are now combined in one column showing the CPT code and procedure description as well as the ICD-9 code and diagnosis description.

- Version 12.12 A new selection panel has been added to the Procedure Revenue Report. This report can now be run by Procedure Category.

- Version 12.08 Added ability to print only the primary diagnosis on the HCFA 1500 claims form in box 24E as required by Tennessee Medicare.
  To activate this feature we have added a check box in Insurance Controls "Primary Dx Only".

- Version 12.08 Procedure Code File Maintenance Print Table now prints more complete data such as financial class and department.

- Version 12.08 In patient registration the system will now check for duplicate social security numbers when selecting the accept button if the user did not enter through the social security number field originally.

- Version 12.08 A column has been added to the claim window that will show the transaction remaining.

- Version 12.08 A new radio button "Exclude Capitated" has been added to the claim window. If this button is selected, claims with a transaction remaining amount equal to 0.00 will not appear in this window.

e-Medsys

Release Notes Version 12.00

- Version 12.08 For Medicaid claims, box 33 on the HCFA form will now print the group number in the PIN number field if the "Box 33 – print Group #" check box is selected in Insurance Controls.

- Version 12.07 If the checkbox is set in company file maintenance for "Default Primary Dx in Charge Posting", you will now see a button on the charge posting screen that will allow you to update the diagnosis in the patient file, otherwise diagnosis is getting update based on the first charge posted.

- Version 12.07 When printing a demand change ticket the system now defaults to the patient's physician and patient's department.

- Version 12.07 When printing a demand change ticket, the list of available tickets will only display the front side charge tickets.

- Version 12.07 Flexible Month End Rules

  1. You cannot post charges/payment/reversal for the current month unless it is open.
  2. You can now post a charge/pymt/reversal to an earlier month even if that month is not open. The charge/pymt/reversal will go into the first open period.

  Example 1. If today is Dec 5 and Nov is open and Dec is closed.
  1. You can't post or reverse a Dec Charge/Pymt w/o opening Dec.
  2. Any other charge/pymts/reversals you post goes in Nov
  (System will no longer forces you to open Dec if you need to post a charge/Payment/reversal to Oct or earlier)

  Example 2. If today is Dec 5 and Nov is open and Dec is open
  1. All Nov charges go in Nov
  2. All Dec charges go in Dec
  3. Any prior to Nov goes in Current Period (Dec)
  (Always worked like this - no change)

- Version 12.07 A print button in charge ticket audit has been added that will print out the charge ticket log displayed on the screen.

- Version 12.07 When requesting a Demand Account Activity Report there is now an option to include the Audit Trail. Additional check boxes have also been added to print past, future or all appointments. We have also added check boxes that will allow charges, balances and claims to print or not print.

Release Notes Version 12.00

- Version 12.07 Added 2 new check boxes in Company File Maintenance that allows the user to determine if the diagnosis is cleared between charge lines for standard and hospital posting. The boxes are:

  "Enable Copy DX feature – Standard charge posting" and
  "Enable Copy DX feature – Hospital charge posting"

- Version 12.07 In Charge Ticket Modify two new buttons have been added, "POS +1" and "POS –1". These buttons can be used to move positions containing procedures or diagnosis up or down by 1 position.

  Select the position(s) to be moved and click POS +1 to increase the position number or POS –1 to decrease the position number.

- Version 12.06 Charge Tickets – The aftercare date now prints on the bottom right hand corner of the charge ticket in a box labeled Aftercare Date.

- Version 12.06 Print Button- A button has been added for one step printing for walk-in charge tickets without having to book an appointment, account activity, and insurance claims. It also allows for quick printing of claims marked reprint or rebill, patient documents and labels. This print button has been added to the following three screens: Patient Registration, Inquiry, and Bookings.

- Version 12.04 Authorization - Added "number of visits allowed" to authorization screen. This enhancement allows the tracking of authorizations based on number of visits as opposed to procedures. The posting program will track number of visits used.

- Version 12.03 Daysheets –Under the Details tab Daysheets can be sorted by input order. This feature also allows printing of one transaction type (Charge or Credit) making Daysheet balancing easier.

- Version 12.02 Charge Posting – Total number of charges posted can now be seen in the bottom right hand corner of the charge posting screen. This feature allows quick verification that all charges have been posted from the marked Charge ticket.

Release Notes Version 12.00

Scheduling Module

- ≥New in Version 12.49≤ A new Appointment Scheduling Report has been added. The Appointment Activity Report gives a detailed analysis of provider scheduling activity. The report will recap the activity based on New Patients, Established Patients, Walk-ins, No Shows, and Overbooks. The report will recap appointment bookings by Department, by Provider, and by booking date. Use the following key for report interpretation.
- **Est Sch**: Established Patients that are scheduled in advance (non walk-in) and are kept or booked (not no shows or cancels)
- **New Sch**: New Patients (first appt) that are scheduled in advance and are kept or booked (not no shows or cancels)
- **Tot Sch**: Est Sch + New Sch - all patient appts scheduled in advance and are kept or booked (not no shows or cancels)
- **Est Wlk**: Established patients with appts marked as walk-ins and are kept or booked (not no shows or cancels)
- **New Wlk**: New patients with appts marked as walk-ins and are kept or booked (not no shows or cancels)
- **Tot Wlk: Est Wlk + New Wlk** - all patient appts marked as walk-in and are kept or booked (not no shows or cancels)
- **Tot Est: Est Sch + Est Wlk** - all appts of established patients and are kept or booked (not no shows or cancels)
- **Tot New: New Sch + New Wlk** - all appts marked as walk-ins and are kept or booked (not no shows or cancels)
- **Tot Seen:Est Sch + New Sch + Est Wlk + New Wlk** - all patient appts that are kept or booked (not no shows or cancels)
- **No Shw**: all appts marked as NO Show
- **Tot Adv: Tot Sch + No Shw** - all appts booked in advance includes no shows but not walk-ins

e-Medsys

Release Notes Version 12.00

- **Ovr Bk**: all appts that are overbooks includes no shows and walk-ins but not cancels

- **Pat Can**: appts cancelled by the patient

- **Doc Can**: appts canceled by the doctor

- **Tot Can: Pat Can + Doc Can** - total patient appts cancelled

- **Avl**: unused slots

- **%No Shw: No Shw / Tot Adv** - percent no show based on advanced bookings

- **%wlk: Tot Wlk / Tot Seen** - percent of walk-ins vers total patients seen

- **%seen: Tot Seen / (Tot Seen + Avl)** - percent seen vers total slots includes overbooks

- New in Version 12.43 A new Patient Tracking status of 'REGISTERED" has been added. The new color scheme is: ARRIVED – yellow (new color); REGISTERED – orange (previously the color of "Arrived"); ADMITTED – Red (same).

  When a patient arrives and they can be seen immediately, the status of REGISTERED can be set **without** having to set the status to ARRIVED first. The arrived time will be the same time as the registered time.

- Version 12.30 Provider File Maintenance now has a new field to allow for the defining of time increments in Appointment Scheduling. The time increment set for a provider in this field will become the default time increment in the Appointment Bookings Screen. This will become the default for the Single Provider, Week-at-a-Time mode. If this field is not set, the time increment default will be the user's default that was defined in User File Maintenance.

- Version 12.26 You can now specify a number of offset days in the Dates Tab in Scheduling Reports. This will allow a user to use the current date, and then set the offset days at 1, for example. When this report is job scheduled, the system will print the current day's report and the next day's report. With this capability, a user would be able to have the next days Schedule Hardcopy ready for chart pulling when they arrive at work in the morning.

Release Notes Version 12.00

-

- Version 12.18 In the Bookings Screen, when the user is in Day at a Time mode and looking at a Multi-Provider View, the system will now display the day of the week in the heading of the Time Column.

- Version 12.10 Build Calendar - When rebuilding the calendar (replacing a template for a day) the system will now include a match on department. For example, for the appointment slots that need rescheduled, if the department does not match the department on the new template for the day being rebuilt, the appointments will appear as overbooks.

  Build Calendar – When rebuilding the calendar (replacing a template for a day) when the system is trying to reschedule appointments, if there are multiple slots for the same time in the new template, the system first tries to match on visit type, then visit group before taking the first slot with the matching time.

  Build Calendar Report – This report will now just print the appointments that went in as over books and where the visit type has changed for a given day.

- Version 12.08 In appointment scheduling, you can now schedule the same time over multiple providers (Service Team) for a non-patient visit. You can select the slots to be booked by clicking the 1st slot and dragging your mouse across the screen to the last slot on the line or click the 1st slot and then hold down the Shift Key and click the last slot on the line.

- Version 12.08 When Rebuilding the Doctors Calendar due to changes in your template, any booked appointments where the department no longer matches the template the appointment will now go in as an overbook. Rebuilding will also attempt to match on Visit Type if the template contains multiple slots for the same time.

  The exception report will now only print overbooks and appointment where the Visit Type no longer matches.

- Version 12.07 In Appointment Bookings, the display option time increment can now be set to 30 minutes.

Release Notes Version 12.00

- Version 12.06 Job Scheduling – The Schedule Hardcopy report can be now be scheduled to print. If the appointment date is left blank, the program will use the system date as the appointment date. To schedule a hardcopy report to run tomorrow and print with tomorrow's date, set the schedule time to run after midnight, which will then include tomorrows date in the report. This feature is also available for charge tickets.

- Version 12.06 Cancellation – Multiple appointments can now be cancelled in the bookings window. This feature easily allows you to cancel multiple appointments for a given day by holding down the Shift key.

- Version 12.05 Schedule Hardcopy - Appointment Disposition may be chosen as an option for printing a Schedule Hardcopy.

- Version 12.05 Visit Type - A default visit type can also be set up in User File Maintenance. This feature will allow each user to select the most frequently used visit type as their default, improving the speed of appointment scheduling.

- Version 12.03 Booking – The booking screen has been changed to allow patient check-in on multiple booked time slots. Patient can be checked in from either the booking screen or the patient detail screen.

- Version 12.03 Sorting By Provider – Appointment Charge tickets and Appointment Documents can now be sorted by Provider during printing.

Release Notes Version 12.00

Bug Fixes

- Version 12.23 Under certain circumstances the WINDOW ICON was not holding all the screens a user had opened. This has been fixed.
- Version 12.02 Program error no longer occurs when changing mode from several providers and resources on screen to one provider resource in bookings screen.