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Billing Module

- **New in Version 14.46** When *changing* a patient's **primary** financial class from a Patient Balance-Immediate financial class (i.e.; Cash, Priv Ins) to an Insurance Responsible financial class, the responsibility will be flipped to "Insurance" on each transaction based on the effective dates. **Exception to this Rule**: If the charge amount does not equal the remaining amount (i.e.; copayment has been posted) and the services have been billed to an insurance plan, the responsibility will **NOT** be changed.

- If the primary financial class is "Insurance" responsible and changed to Patient Balance – Immediate financial class (i.e.; Cash, Priv Ins) the transactions are changed to Patient Responsibility based on effective date.

- **New in Version 14.46** The Charge Ticket Audit Report now defaults to sort by service date and status. All non-reconciled tickets will be displayed first. Also, the print button will prompt you to print only non-reconciled charge tickets.

- **New in Version 14.46** When viewing claims from the Inquiry Screen or through Credit Posting, the cursor will now be positioned on the most recent claim. The screen is scrolled so the most recent claims will always be displayed.

- **New in Version 14.46** The SSP plan can now be associated with a secondary insurance plan (not available if the Community Health Feature is enabled). In Patient Registration the SSP plan will be visible only if the secondary plan has been associated with a SSP plan. You will still have the option to remove the SSP for a patient if necessary.

- **New in Version 14.46** A selection panel for Attorney and Referring Physician was added to the Account Activity Report and the Age Analysis Report.

- **New in Version 14.46** When printing the Procedure Revenue report a new check box has been added to the Procedure panel option that will allow you to sort the Procedures selected for the report in CPT order.

- **New in Version 14.46** The SCHEDULE button has been added to Insurance Billing, ECS options.

- **Version 14.43** When in the Reports Options, using the Financial Class/Insurance tab, and selecting an Insurance Plan, the system will now open a window displaying the name of the insurance plan, street address and city. This will aid in the selection of the necessary plans for reporting.

- **Version 14.43** The Collections Module now has a new panel in Process New and Process Existing that will allow Patient Collections processing to be run separately from Insurance Collections processing. Both Patient and Insurance are checked by default.

- **Version 14.37** There is now a hospital link in Department File Maintenance that allows you to associate a department with a hospital that has been added in Hospital File Maintenance as well as set up in the Department file. If you want to track revenue for services that have been performed in a hospital and the link has been established in the Department file, the system will not prompt for the POS in Charge Posting when posting a procedure with a POS of Inpatient Hospital or Outpatient Hospital procedure. However, if the link is not set up, and the procedure posted has a POS of Inpatient or Outpatient Hospital, the system will continue to prompt with the POS panel.

- **Version 14.35** The Account Activity Report Panel has a new checkbox added. When checked the new checkbox will print reversals on the report. This checkbox has been added to the PRINT button in the Inquiry Screen as well as the Reports options panel.

- **Version 14.35** New merge fields have been added to the Document Merge program. These fields will allow the patient and guarantor names to print on the document in Proper Case instead of all capital letters. The new fields are: PLNAME_P, PFNAME_P, GLNAME_P, GFNAME_P.

- **Version 14.35** A check box has been added to the statement control file, Proper Case Name. When checked this box will print the patient's name on the statement in Proper Case instead of all capital letters.

- **Version 14.34** When running the daysheet in posting order, the option to print the payments only, adjustments only, or refunds only has been added. These codes are no longer grouped under the heading Credits.

- **Version 14.34** If a procedure is marked as a Stark Charge in Procedure file maintenance; the system will force a referring provider to be entered in Charge Posting.

- **Version 14.31** Added the Procedure RBRVS Units Report to the reports file in the system. Once the unit values of procedures are entered in the units field in Procedure file maintenance, this report can be run for charges posted. The report will be based on the unit values entered rather than charge amount. The options for this report are same as for the Procedure Revenue Report.

- **Version 14.31** Added ability to add Recall Notes to the General Codes file maintenance table.

- **Version 14.22** Added ability to mark an account as inactive in the patient registration screen. The account must have a zero balance in order to mark the account as "inactive". The system will prevent posting charges, payments, reversals, and appointment bookings to an inactive account. A search can be done on an inactive account by checking the "inactive" box in the search screen.

- **Version 14.17** In the Charge Posting Screen the modifier is now visible in the lower screen (Charge Accumulation Box) after you have posted a charge.

- **Version 14.15** Reversing a charge that has a Recall Tickler entry attached, will now automatically delete the Recall Tickler entry.

- **Version 14.14** In Company File Maintenance there is a new tab that holds the Company's preferred posting defaults. The newest checkbox added to this pane allows you to "Hold Checkbox Setting" from the Charge Posting Screen. When this box is checked, the Charge Posting program will keep the Credit Posting, and Print Statement boxes checked after the first time the User initially checks these boxes in Charge Posting.

- **Version 14.12** You now have the ability to print the User table by clicking on the PRINT button in User File Maintenance.

- **Version 14.12** When posting payments, the system will check to see if the primary insurance is Medicare and the secondary insurance is marked for crossover. If yes, and you are posting a secondary payment to the claim, the system will check if the primary has paid before changing responsibility to the patient. If posting the primary payment to the claim, the system will check if the secondary has already paid, which may cause the primary to change responsibility to the patient.

- **Version 14.12** The ability has been added to the system to search for a procedure or procedures by category and then print the table.

- **Version 14.12** In Patient Registration, the system will no longer prompt to "Retain old data as historical data" when changes are made to patient registration information. The system will now automatically save all patient registration changes.

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- **Version 14.08** You now have the ability to print the Credit Code table by clicking the PRINT button in Credit Code file maintenance.

- **Version 14.08** A recap totals page has been added to the Account Activity Report. This totals page includes Total Charges, Total Remaining, Total Payments, and Total Patient Count of all patients or patient included in the report. Also, balances are aged and broken out by patient balance, insurance balance and total balance. This page will only print when the report is run through the Reports Menu.

- **Version 14.04** A Provider Selection has been added to the Referral Analysis Report.

- **Version 14.04** New Collection Key Words have been added to the Document Merge function. These key words are: "Last Patient Payment", "Last Patient Payment Date", Total Amount of Open Payments" and Amount of Delinquent Payment".

- **Version 14.04** A new checkbox has been added to the Procedure File Maintenance screen. This checkbox will allow you to view either the active or inactive procedures.

- **Version 14.03** The Accounts Receivable figure has been added to the detail pages of the Provider Productivity Report. The figures are calculated based on the provider totals. If after receiving this update, the report is not printing accurate figures, rebuild the provider figures starting with to the first month and year charges were entered into the system.

- **Version 14.02** When the Account Activity Report is run from the PRINT button you now have the ability to print the report with all charges (not just the open charges). A new checkbox has been added to "Print Open Charges". This box is checked by default.

- **Version 14.01** The Visit/User Stats Report (Community Health Center Feature only) now has a new cross tab, "Dept by Purpose of Visit".

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Scheduling Module

- **New in Version 14.43** The Schedule Hardcopy Report has a new print option that will allow for the printing of the report by No Break, Sort by Provider, Date, and Time.

- **New in Version 14.43** The PRINT button in the Patient Appointment Information window now displays “Appt Documents 1”. By selecting an appointment from the Patient Appointment Information Window, and clicking on the print button, the system will display documents from the Appointment Document directory.

- **Version 14.38** Visit Types can now be created based on department. Working with the visit type base entry or a provider alternate, you can now add an alternate by department. This will allow a different charge ticket to print based on the department.

- **Version 14.36** The Print button has been added to the Visit Type in the File Maintenance table.

- **Version 14.35** When the Schedule Hardcopy Report is set to print based on the break by Provider and Date option, the Providers will be sorted by Provider Last Name, First Name. If the provider is a Resource, the sort will be based on description.

- **Version 14.34** The Financial Class panel has been added to the Schedule Hardcopy Report. This new panel will allow the report to be run by financial class.

- **Version 14.34** The time increment can now be set for resources. If these increments are not set in the resource file, the bookings screen will default to the time increments established for the user in User File Maintenance.

- **Version 14.34** The Schedule Hardcopy Report now has more options when choosing to print Supplemental Information Lines. The new radio buttons are: Print First Supplemental Info Line, Print First Two Supplemental Lines, or Print First Three Supplemental Lines of Information. Print No Supplemental Lines, and Print All Supplemental Lines are still available.

- **Version 14.34** When booking more than one appointment for a patient, and the visit types are different **but** the supplemental information is the same for the selected visits types, the Supplemental Information will be carried forward so the scheduler will not have to complete this same information more than once.

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- **Version 14.22** When booking multiple appointments for the same patient and the same visit type, the supplemental information will be carried forward for each appointment.
- **Version 14.22** The Appointment Detail window will now display the user who scheduled the appointment and the date scheduled.
- **Version 14.15** When running Charge Tickets through Reports in Appointment Scheduling, the default SORT option is now Provider-Date-Time.
- **Version 14.02** A new Hardcopy Report option has been added. This option allows for the printing of the hardcopy schedule without breaking by Date or Provider. The report will print a date heading when the date changes. This option will allow for multiple appointment days to be printed on one page.