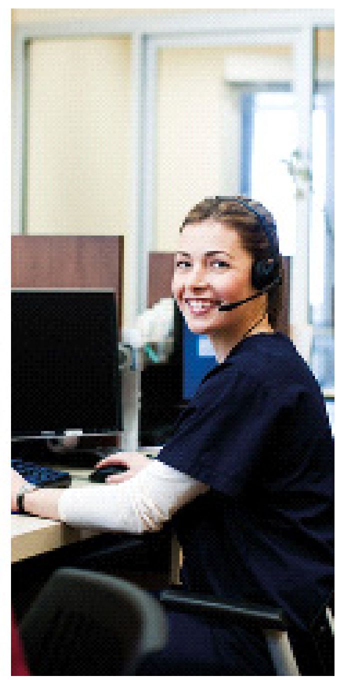
Medisoft 21

Release Notes



December 2016

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Medisoft©

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Table of contents

Chapter 1 - Enhancements

This chapter presents a high-level description of the following enhancements to the Medisoft® system.

In this chapter

NOTE: In rare cases, when installing Medisoft 21 on the server, you will encounter an error during initial conversion, stating that the database is in use. This error can be caused by the conversion process attempting to access the database at the same time as the service driving Online Scheduling. This error is based on timing.

If you see this error, wait a few minutes for the service to complete accessing the database and click the "Retry" button on the error prompt.

Medisoft

Security

Updated Maximum allowed attempts

The Maximum allowed attempts has been enhanced to meet current security requirements. If the value for Maximum allowed attempts has been set to 0, it will be treated as if it were 5. The value has not been changed, however.

If you are not using Global Login

If you want to set the value of Maximum allowed attempts to something other than 5, open the Login/Password Management screen and set the value.

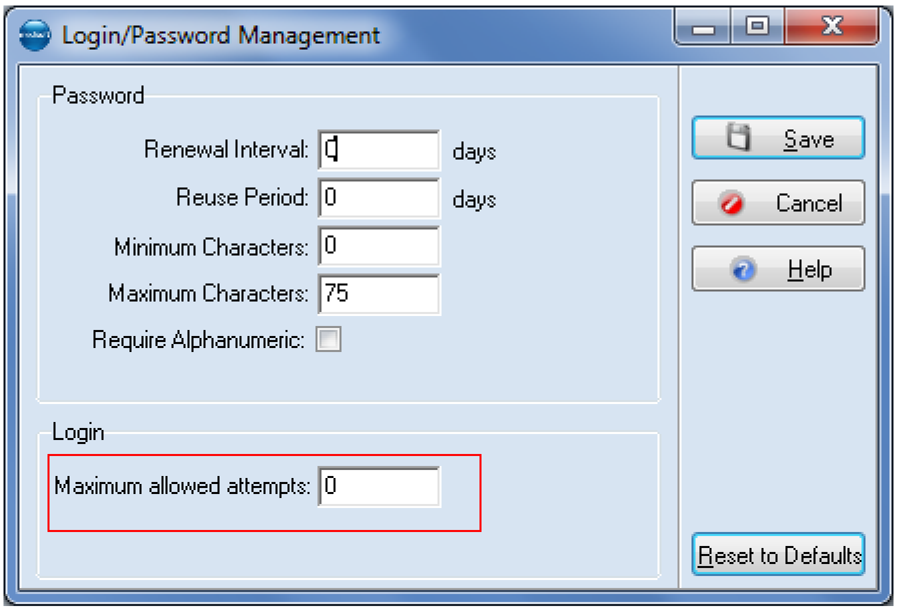


Figure 1. Login/Password Management screen

Note: if you open the Login/Password Management and the value of Maximum allowed attempts is 0, and you try to save, you will receive a warning message. This value must be something other than 0 before you can save.

The Account disable period field has also been removed.

NOTE: If you are using Office Hours Standalone (no Medisoft installed), there is no Login/ Password Management screen. The maximum allowed attempts is fixed at 5.

If a user makes five incorrect attempts to log in, Medisoft will deactivate the user's account. Another user with Level 1 access must reactivate the account by clearing the Inactive check box on the Security Setup screen for the user.

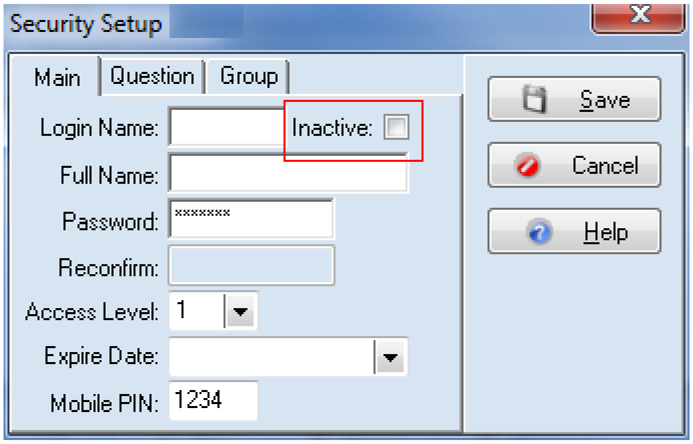


Figure 2. Security Setup screen

If you are using Global Login

If you want to set the value of Maximum allowed attempts to something other than 5, open the Global Login Global Options screen and set the value. It will be treated as 5 if it is currently set to 0.

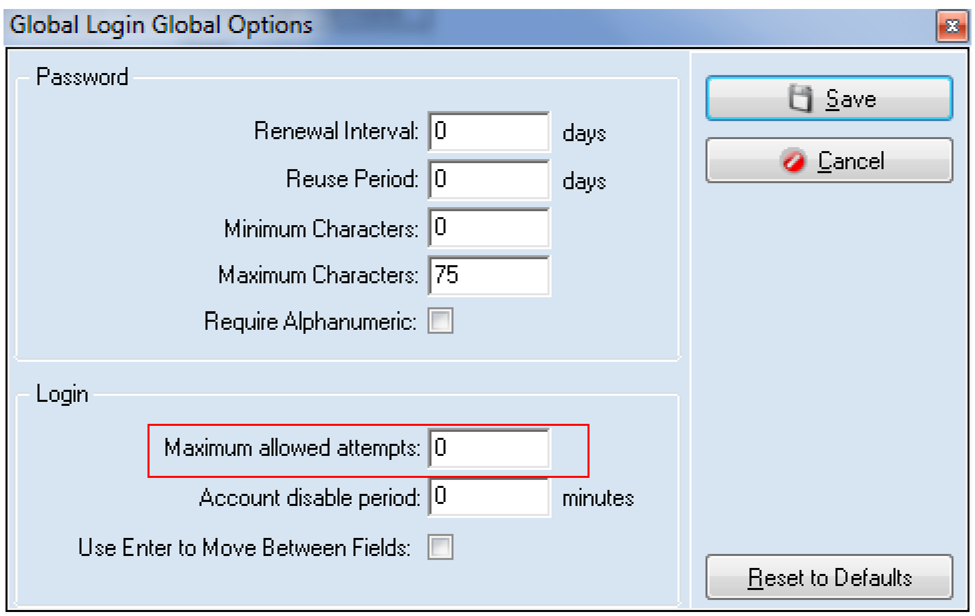
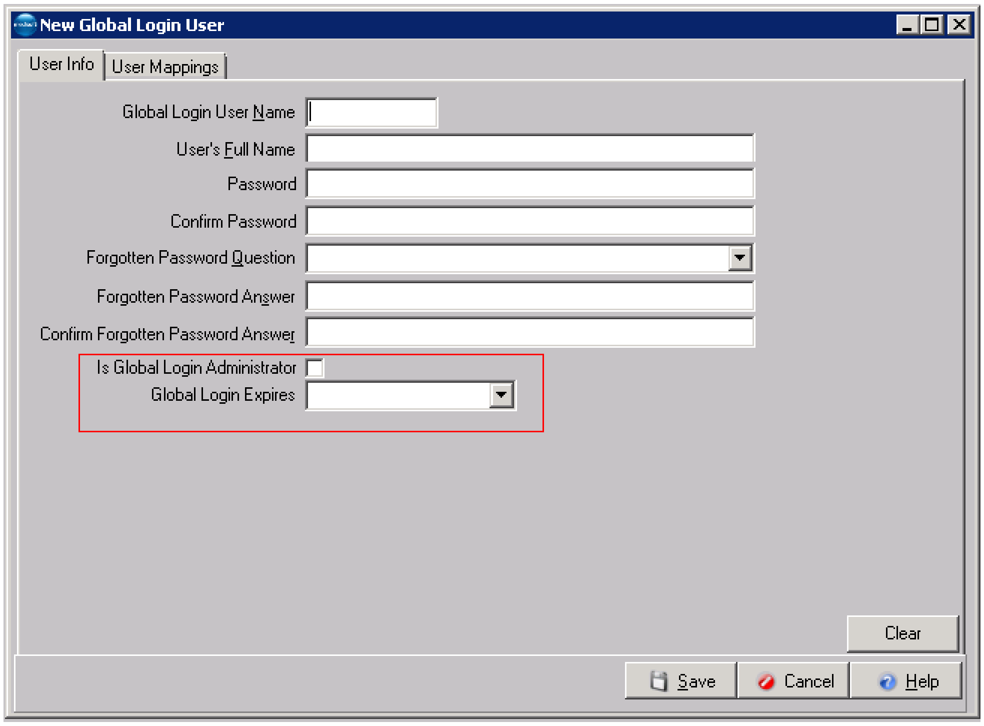


Figure 3. Global Login Global Options screen

Note: if you open the Global Login Global Options screen and the value of Maximum allowed attempts is 0, and you try to save, you will receive a warning message. This value must be something other than 0 before you can save.

If a user makes five incorrect attempts to log in, Medisoft will deactivate their account by setting the expiration date to 1/1/2000. Another user with Level 1 access must reactivate the account by setting the expiration date to a future date or removing the date if there is no expiration.



Global Login User screen

Write Off Utility

There is a new utility for writing off small balances. Use this utility to set a date before which outstanding balances will be set to $0.00 and these balances will no longer appear on reports and statements.

New Menu option

To launch this utility, there is a new menu option on the Tools menu, under Services: Write Off Utility.

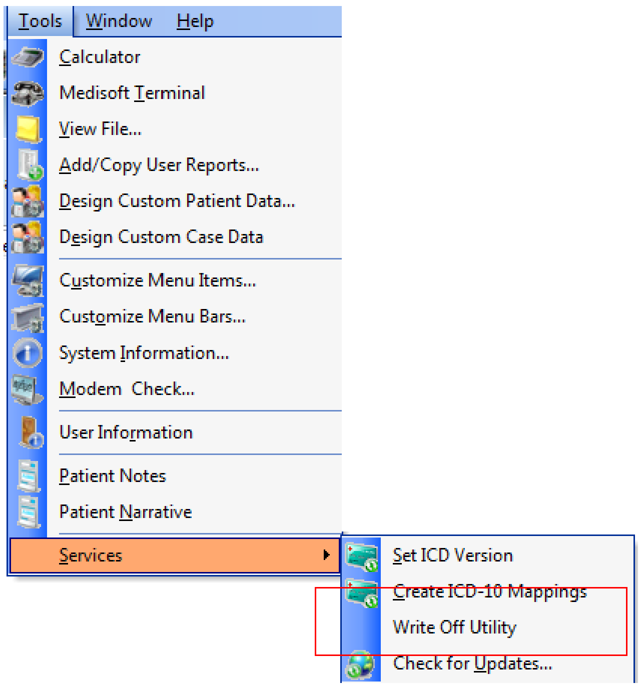


Figure 4. Tools menu

New Write Off utility

This utility allows you to write off old small balances created by transactions and unapplied credits so they no longer appear on reports or statements.

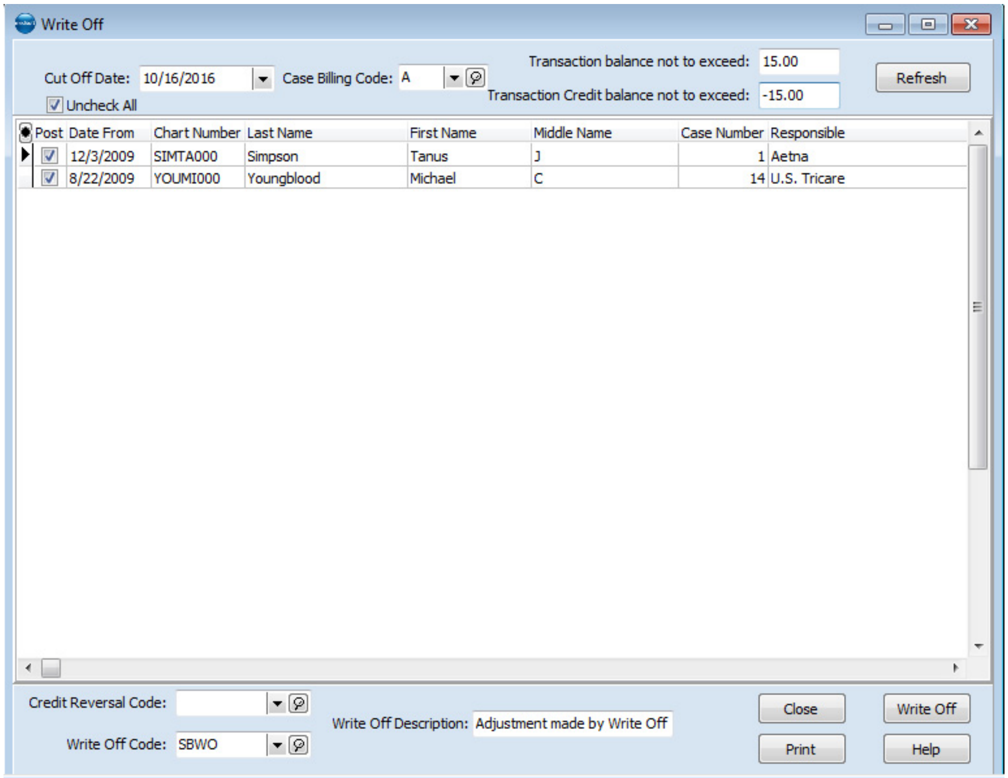


Figure 5. Write off Utility

The fields and elements on this screen are described below:

Element	Description
Cut off date	Enter the cut-off date here. Transactions that are dated before this cut-off date will be updated.
Case Billing Code	Select the Case Billing Code from the drop-down menu.
Transaction balance not to exceed	Enter a positive dollar amount. This value determines the monetary limit of the write-off. Transactions whose amount falls below this amount will be updated.
Transaction Credit balance not to exceed	Enter a negative dollar amount. This value determines the monetary limit of the write-off. Transactions whose amount falls above this amount will be updated.
Refresh button	Click this button to refresh the data in the grid. Line items are sorted first by the chart number and second by the Date From.

Element	Description
Check/Uncheck All button	Click this button to either select or clear all of the line items in the grid.
Grid	
Post	Select this check box to include the transaction in the write-off. The default value is checked.
Date From	This column shows you the date of the transaction. To sort the grid by this column, click the column header.
Chart Number	This column shows you the patient's chart number. To sort the grid by this column, click the column header.
Last Name	This column shows you the patient's last name.
First Name	This column shows you the patient's first name.
Middle Name	This column shows you the patient's middle name.
Case Number	This column shows you the case number of the transaction or unapplied credit.
Responsible	This column shows you the responsible party.
Balance	This column shows you the balance. To sort the grid by this column, click the column header.
Last Patient Payment Date	This column shows you the last date that a patient payment was applied to the transaction.
Procedure Code	This column shows you the procedure, payment or adjustment code associated with the transaction.
Description	This column shows you the description of the procedure payment or adjustment code.
Credit Reversal Code	Select a credit reversal code from the drop-down. This code will be used when writing off credits or to off-set unapplied credits. Adjustments with a Code Type of Adjustment that are not checked Make Adjustment Negative will display in the list.
Write Off Code	Select a write off code from the drop-down. Adjustments with a Code Type of Adjustment that are checked Make Adjustment Negative will display in the list.
Write Off Description	Enter a description of the write-off or leave the default information.
Close button	Click this button to close the screen.

Element	Description
Print button	Click this button to print a report showing the contents of the checked items in the grid to print a report of the items that will be adjusted before doing the write off. For more information, see “New Report” on page 8.
Write Off button	Click this button to perform the write off. You will receive a warning popup before the operation continues. Click Yes to perform the write off.
Help button	Click this button for help using this screen.

Rules of write offs

- Once a transaction is written off and has a zero balance, Medisoft will mark it Complete
- Once all the transaction lines for a claim are marked Complete, Medisoft will mark the claim status as DONE for all claim Statuses that apply (primary, secondary, tertiary)
- Once all the transaction lines tied to a statement have a zero balance, Medisoft will mark the statement as DONE

New Report

You can print a preview of the items that will be written off by clicking the Print button.

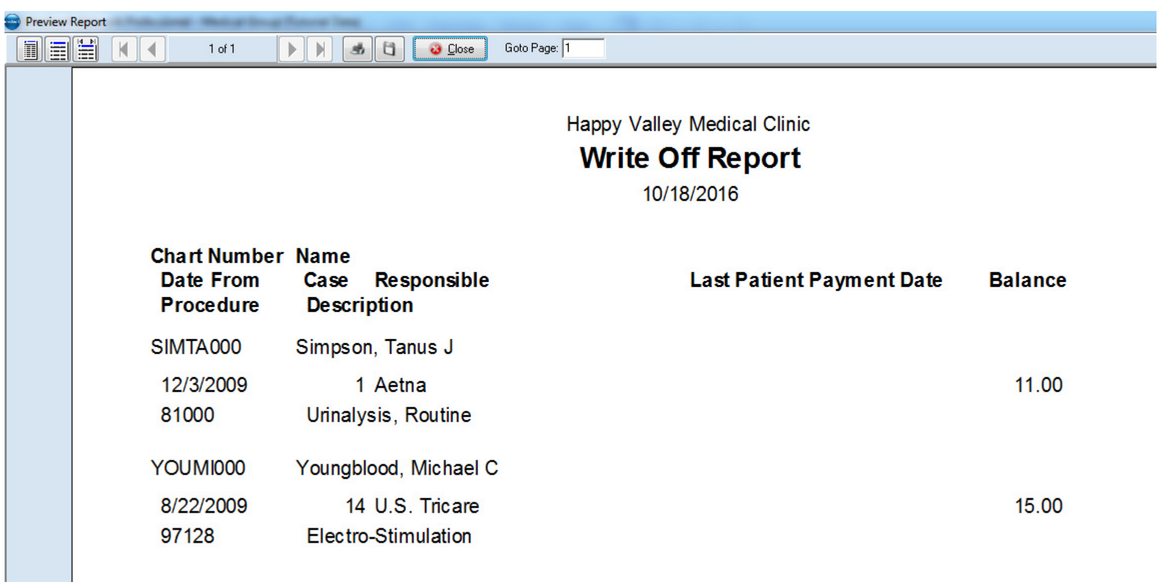


Figure 6. Write Off Report

To perform a write off

1. On the Tools menu, select Services > Write Off Utility. The Write Off Utility screen appears.
2. Select a Cut Off Date.
3. Select a Case Billing Code.
4. Enter values for transaction balances not to exceed.

5. Click the **Refresh** button. The data in the grid refreshes.
6. Select the transactions/unapplied credits you want to write off in the grid.
7. Select the appropriate reversal code or write off code and enter a description of the write off.
8. Click the **Write Off** button.
9. Click **Yes** on the warning popup.

Note: The Credit Reversal and Write off Codes are the only required fields.

ICD-10 Code search

Updated Diagnosis: (new) screen

The Diagnosis: (new) screen has been enhanced for ICD-10 code/description search and find.

New button

There is a new button on the screen: ICD-10 Lookup. Clicking it will open the eMDs ICD-10 Search screen.

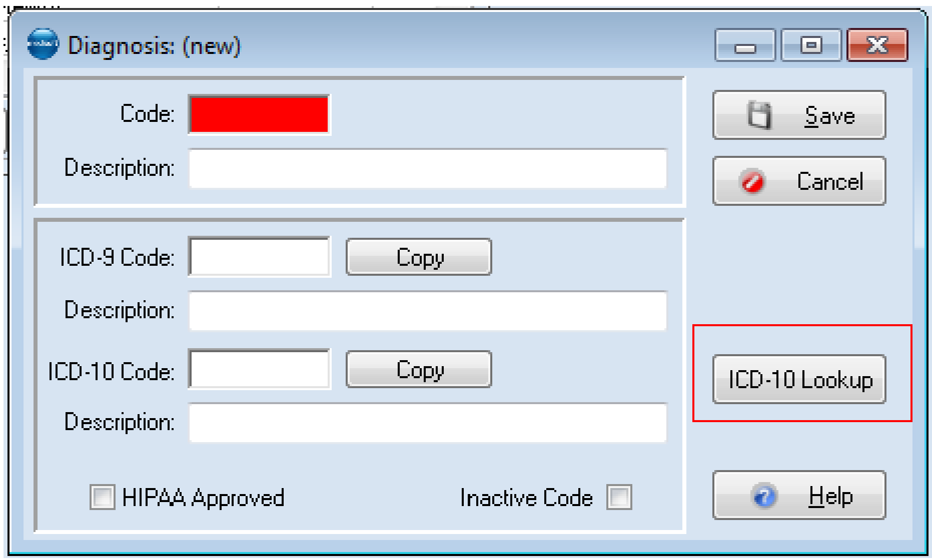


Figure 7. Diagnosis: (new) screen

Note: This new button also appears on the Diagnosis: edit screen.

New screen

The eMDs ICD-10 Search screen will open when you click the ICD-10 Lookup button. Use this to look up and select ICD-10 codes/descriptions.

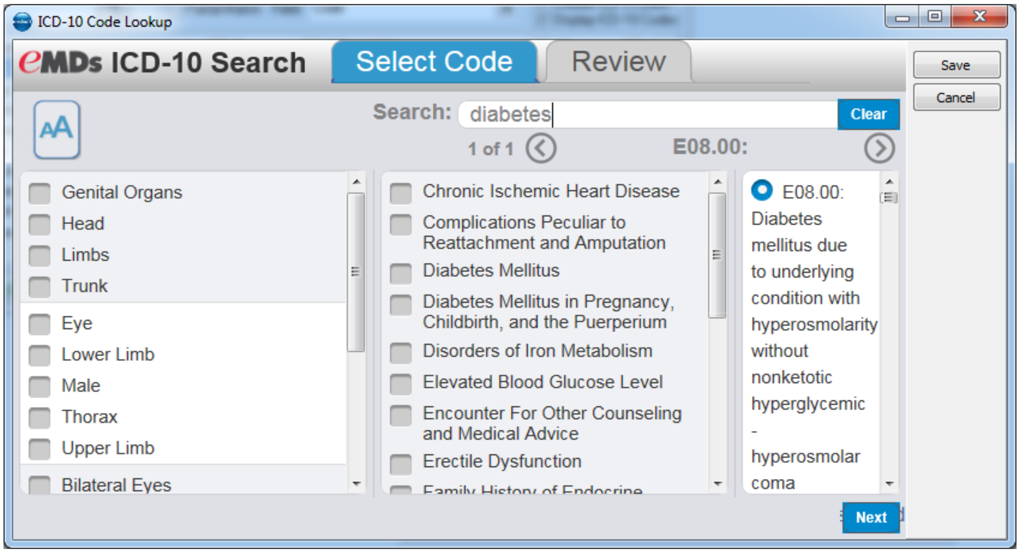


Figure 8. eMDs ICD-10 Search screen - Select Code tab

Using this screen you can enter a code or description, such as “Diabetes,” and the Search will locate corresponding ICD-10 codes. Select one, click the OK button, and the ICD-10 code/ description will be added to the Diagnosis: (new) screen and highlighted.

Depending on what information is entered in the Diagnosis: (new) screen, the information displayed by the eMDs ICD-10 screen will vary. For instance,

- If there are no codes (new) and you click the button, the form is blank and you can search.
- If there is a code in the ICD-10 Code field, it will search for that code,
- If the ICD-10 Code field is blank and there is a code in the ICD-9 Code field, it will search for that.

In the last two scenarios, if the search yields no results, there is a message that says “No results found. Please try again using a different code description.”

Important Note: if you are editing an existing Diagnosis code and select an ICD-10 code and description from the eMDs ICD-10 Code Search screen, it will overwrite any existing ICD-10 Code and Description, as well as well as the main Description field.

Office Hours

Auto Remind

There is a new tool you can use to create automatic reminders to send to your patients regarding upcoming appointments: Auto Remind. Auto Remind will sync with your appointment data and allow you to send reminders via email, phone, text, and fax.

With Auto Remind, you can potentially reduce costs, minimize no-shows, and improve customer service.

When the patient confirms the appointment, appointments in Office Hours will be updated.

The first time you click the Auto Remind icon, you will be asked to enroll. Once you have enrolled, you will launch the application when you click the icon.

Launching Auto Remind

You can launch Auto Remind in the following ways:

- Office Hours toolbar: Clicking this button will open Auto Remind to the main page.
- Appointment Entry/Edit: Clicking the Auto Remind button will open Auto Remind to the Appointment page.
- Patient/Guarantor page: Clicking the button will open Auto Remind to the Patient page.
- Right-Click menu: Clicking the Auto Remind option will open Auto Remind to the Appointment page.

Online Scheduling

Online Scheduling is a tool that enables patients to make and update appointments online. Once patients are enabled in Office Hours or Medisoft, they can create appointments online using Online Scheduling.

Online Scheduling is available only for Medisoft Network Professional or Medisoft Clinical.

Setup

When the Online Scheduling behind-the-scenes service is running, there is a new option on the Tools menu. Click this option to open the setup screen for Online Scheduling.

Once this screen is completed, you will be able to inform patients that they can schedule online.

Enabling patients

There are new fields for enabling a patient for online scheduling.

Updated Appointment Reason Entry screen - Office Hours

New field

There is a new field on the Appointment Reason Entry screen: Web Enabled. Select this check box to enable the reason code to be displayed on the scheduling web site for the patient to select.

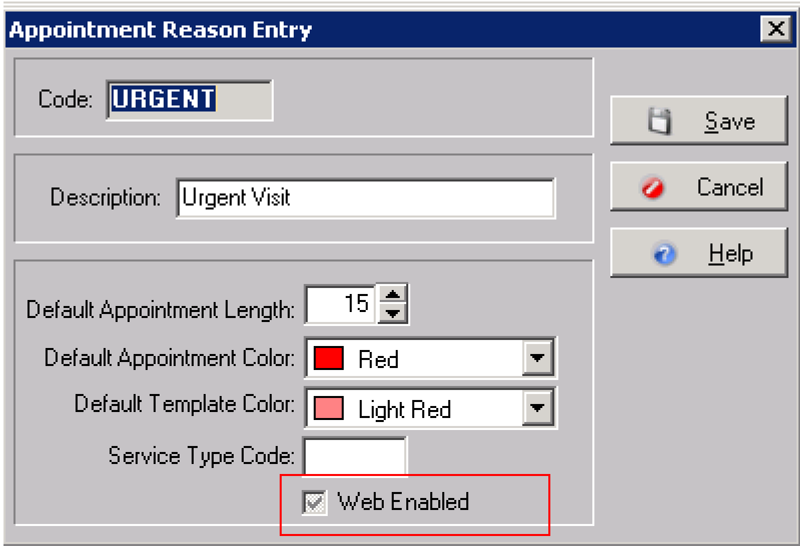


Figure 9. Appointment Reason Entry screen

Updated Patient/Guaranter - Other Information screen - Medisoft

New section

There is a new section on the Other Information tab of the Patient/Guarantor screen: Patient Portal. Use this section to enable the patient for online scheduling of appointments. Select the Web Enabled button to enable the patient for online scheduling.

The Appointments Allowed field sets the maximum number of active online-scheduled appointments the patient is allowed. If the patient already has this many future appointments that were scheduled on the web portal, they will not be allowed to schedule any more online appointments.

Note: Set a value in this field. If it is left at 0 the patient will not be allowed to schedule any online appointments.

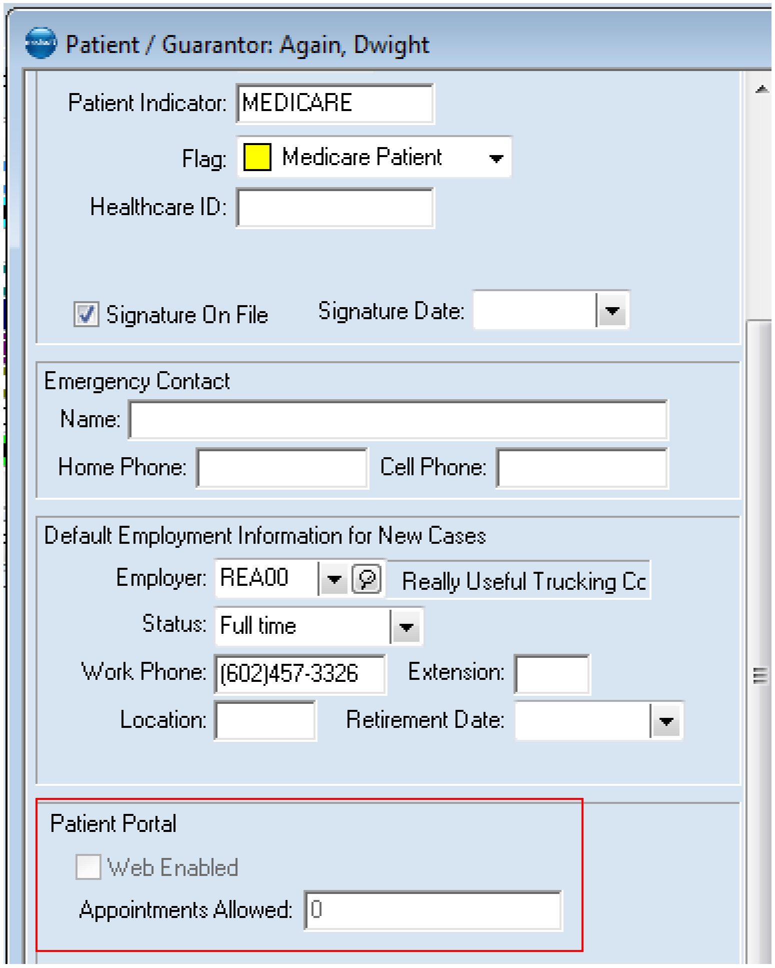


Figure 10. Patient/Guarantor screen - Other Information tab

Using Online Scheduling

Enabling a patient

Select the Web Enabled check box on either the Other Information tab of the Patient/Guarantor screen or the Appointment Reason Entry screen; then, save the change.

Giving patients access to Online Scheduling

Send the patient the URL on the Admin page for Online Scheduling. This URL will show the ID of the practice so the patient will connect to the correct practice.

Revenue Management

The new RelayHealth Java security certificates for the EMF mailbox have been included with the installations of Medisoft 21.

For more information and the resolution for fixing the problem manually, refer to the article at this link: https://socialkb.mckesson.com/var-central/relayhealth_notice_action_required_electronic_mailbox_facility_emf_update .