Medisoft 22

Release Notes

December 2017

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Chapter 1 - Enhancements

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

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AR Tracker

AR Tracker, new to Version 22, ties together AR management into one cohesive workflow. arn advance filtering to track and collect Insurance and patient balances.

New Permissions

There is a new security permission on the Medisoft Security Permissions screen. AR Tracker. Use this to set the level of security on the AR Tracker feature. The default level is 1. Two processes are available:

- View--allows you to view the AR Tracker

- Reassign--allows you to assign/reassign claims/tasks to different users

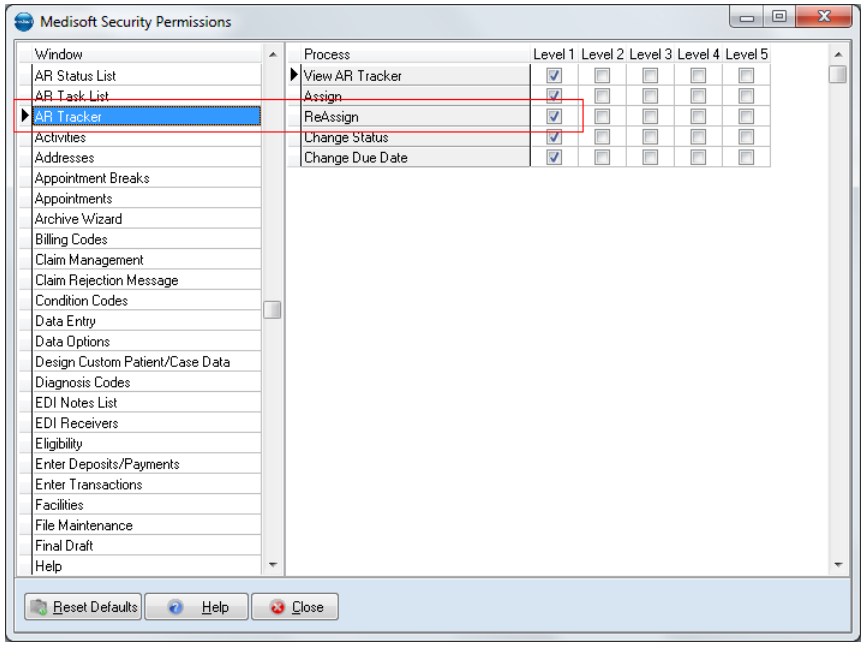

Figure 1. Medisoft Security Permissions screen

New menu Option

There is a new option on the Activities menu: AR Tracker. Click this option to open the AR Tracker screen.

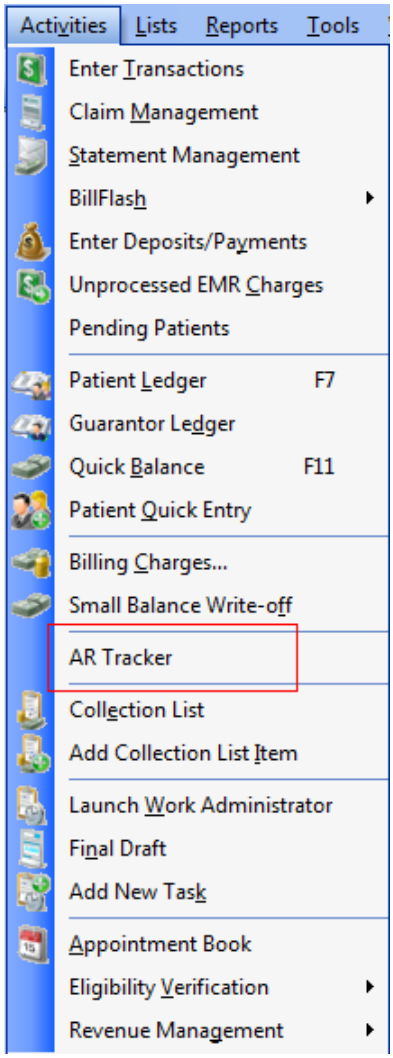

Figure 2. Activities menu

New Toolbar option

There is a new icon on the toolbar for AR Tracker.

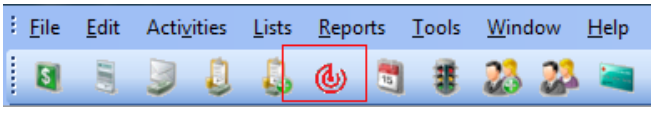

Figure 3. Toolbar

New AR Tracker screen

This is the main screen for the AR Tracker feature. It displays the filter settings, and the grid shows you the information that meets the filter settings.

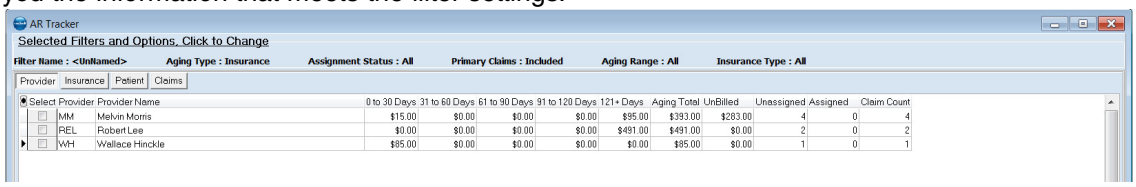

Figure 4. AR Tracker screen

When you select AR Tracker for the first time, it displays the default filter selections of All. In addition, you can save filter selections and settings on the AR Tracker Filters screen (see "AR Tracker Filters screen" on page 7).

Sorting grid columns

You can sort the grid information by a certain column simply by clicking the column header. An icon will appear, showing you which column the data is sorted by and whether the sorting is ascending or descending.

Changing grid columns

You can change which columns appear on the grid. To do so, click the black dot at the left of the column headers. This will open the Grid Columns screen.

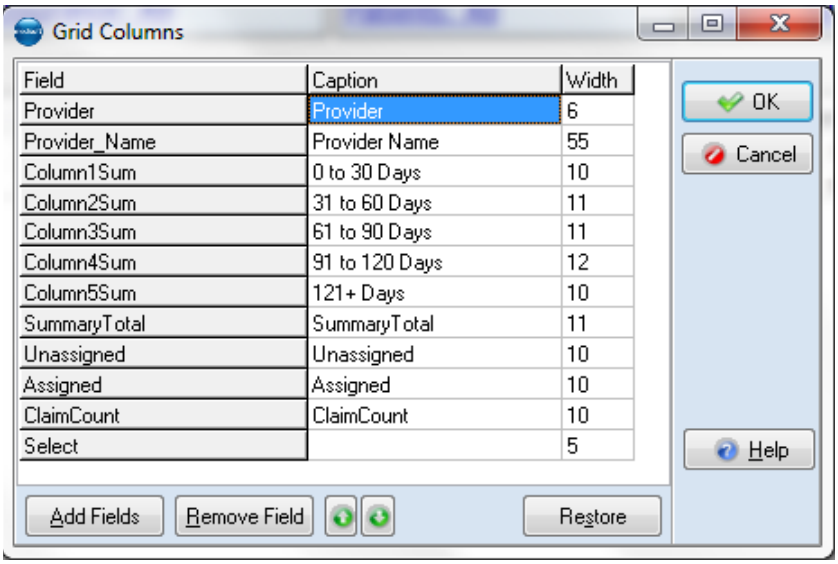

Figure 5. Grid Columns screen

Use the buttons to add or remove fields and click the OK button when you are done.

Filter detail

Below the filter link is the filter detail, which shows you how the grid information has been filtered.

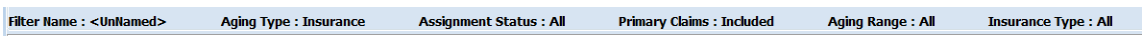

Figure 6. Filter detail

Drilling down

You can drill down to several levels using the four tabs in the lower top section.

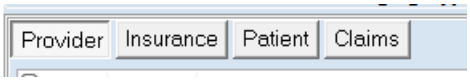

Figure 7. Drill-down tabs

The level will appear indented after you select it.

Double-clicking a grid item will change the level to the right in the list of tabs. You will see that change of level in the indented tab. The benefit of double-clicking is that new level will show you only the items that pertain to the line item you double-clicked.

For instance, double-clicking on Melvin Morris in the image below will show you the Insurance level for only Melvin Morris.

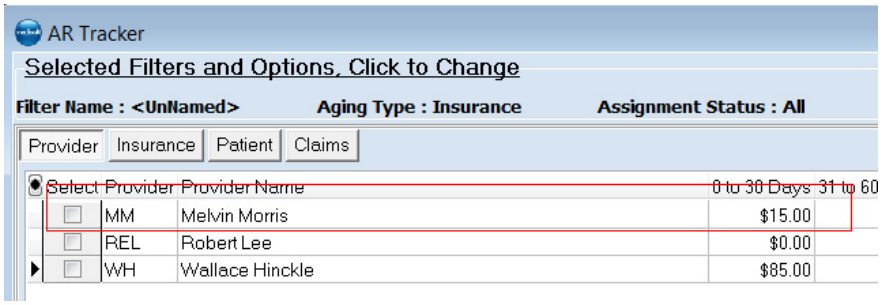

Figure 8. AR Tracker - Provider level

Once you double-click, you will see the image below. Note that the insurance is only for Melvin Morris and the Provider Level filter link shows you the provider's code, indicating the list is filtered by that provider.

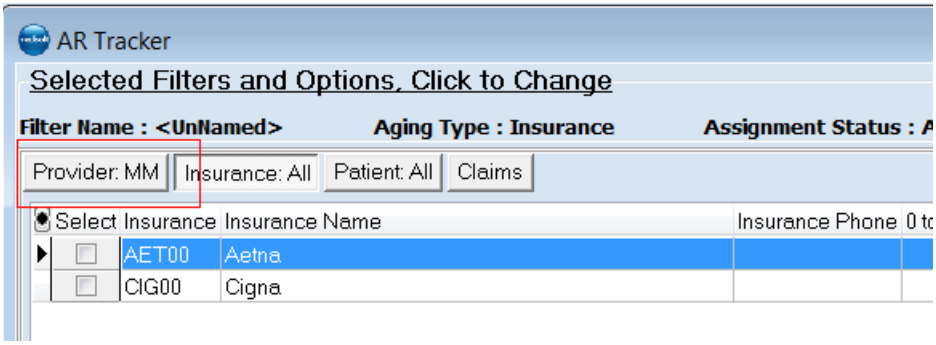

Figure 9. AR Tracker - Insurance level filtered by provider

Claims drill-down

When you select the Claims tab and select a line item, the detail for the line item will appear in a second grid below.

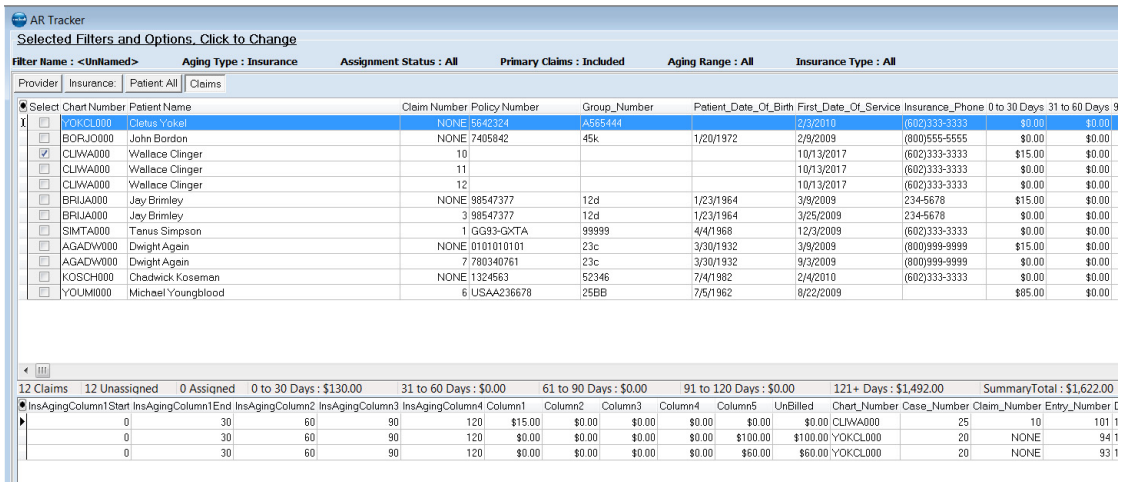

Figure 10. AR Tracker with claim detail

Viewing transactions not assigned to claims

If you want the AR Tracker to show you transactions that have not yet been added to a claim, select the No Claim check box on the AR Tracker Filters screen.

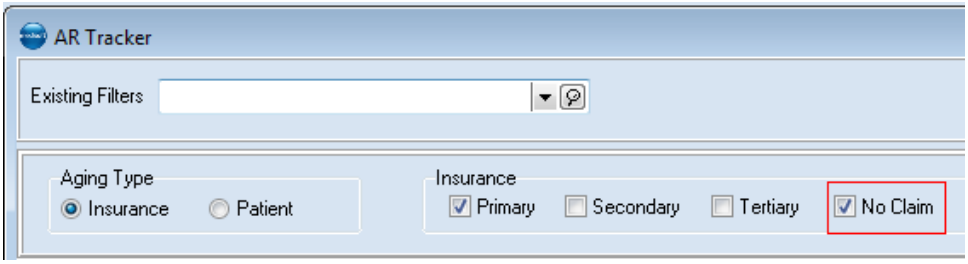

Figure 11. AR Tracker Filter screen

These claims will then appear in the grid and the Claim Number will be NONE.

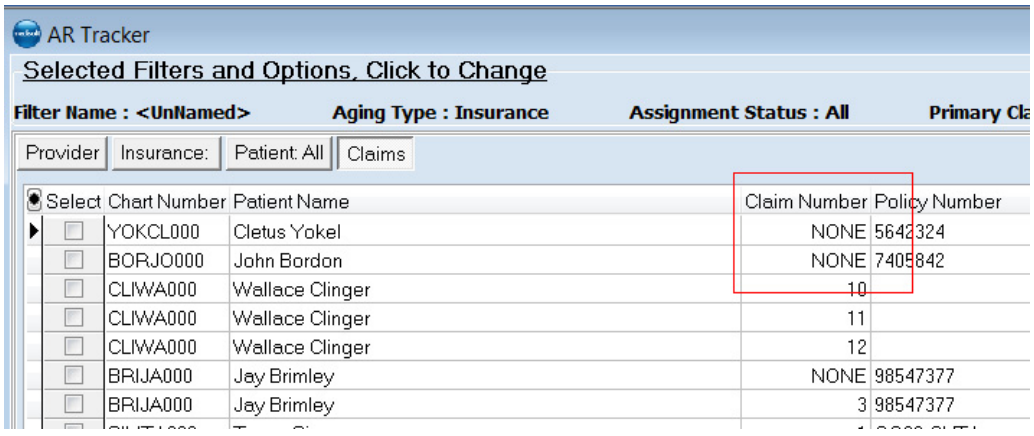

Figure 12. AR Tracker screen

AR Tracker Filters screen

Use this screen to set up and save filtering options for your AR tracking.

To open this screen, click the link in the top section of the AR Tracker screen.

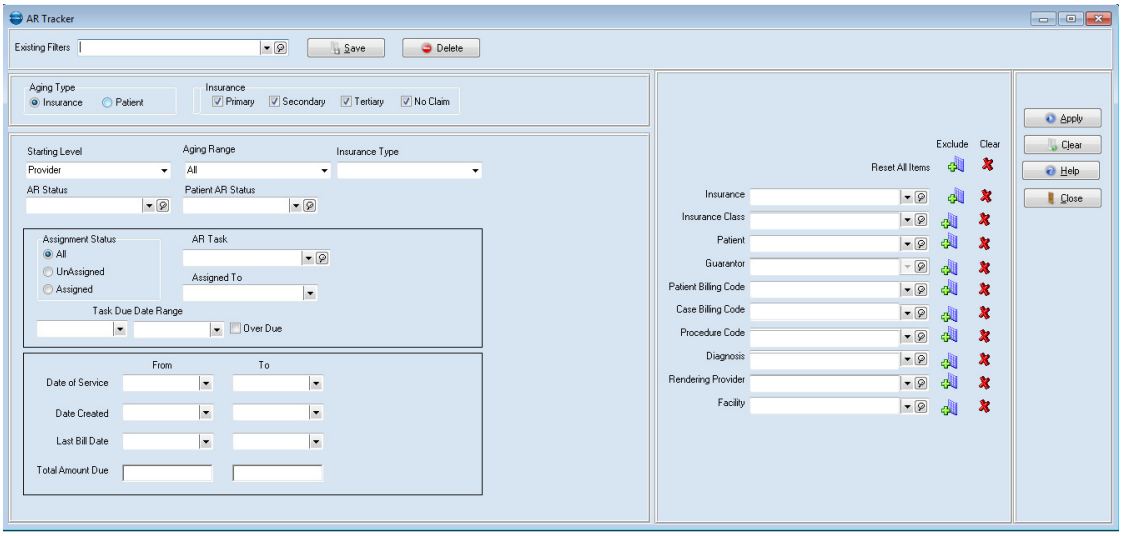

Figure 13. AR Tracker Filters screen

The table below describes the fields and options on this screen.

Element	Description
Existing Filters	Use this field to select an existing filter. This field will be disabled until you have saved a filter.
Save button	Click this button to save the filter. You will see the Save AR Filter screen on which you can enter a name for your new filter.
Delete button	Click this button to delete the existing filter.
Aging Type	Select Insurance or patient. Depending on your selection, the options on the screen will change.
Insurance check boxes	Select which insurances you want to include. You can select as many as you want. Selecting No Claim will enable you to see transactions that have not yet been assigned to a claim. These items will appear on the grid with a Claim Number of NONE. Note: if you de-select all of the values, the filter will run the Primary insurance by default.

Element	Description
Statement Type	Select either Remainder or Statement for this field. This field will not appear when you select Insurance for the Aging Type.
Starting Level	Select the starting level for the filter.
AR Status	Select an AR Status for this filter.
Aging Range	Select the aging range that you want to see.
Insurance Type	Select an Insurance Type for this filter. This field will not appear when you select Patient for Aging Type.
Patient AR Status	Select an AR Status for the patient.
Assignment Status	Select one of the assignment statuses.
AR Task	Select an AR Task for this filter.
Assigned to	Use the drop-down to assign a a user to the task.
Task Due Date Range	Enter a range in these two fields for due date.
Over Due check box	Select this check box if you want overdue tasks to appear.
Date of Service From	Select a beginning date for this filter.
Date of Service To	Select an end date for this filter.
Date Created From	Select a beginning date for creating the claim.
Date Created To	Select an ending date for creating the claim.
Last Bill Date From	Select a beginning last billed date for this filter.
Last Bill Date To	Select an ending last billed date for this filter.
Total Amount Due	Enter a total amount due range in the two fields.
Insurance	Use this field to select which insurance you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field. This field will be disabled when you select Patient for Aging Type.

Element	Description
Insurance Class	Use this field to select which insurance class you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field. This field will be disabled when you select patient for Aging Type.
Patient	Use this field to select which patients you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Guarantor	Use this field to select which guarantors you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field. This field will be disabled when you select Insurance for Aging Type.
Patient Billing Code	Use this field to select which Billing Codes you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Case Billing Code	Use this field to select which Billing Codes you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Procedure Code	Use this field to select which Procedure Codes you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.

Element	Description
Diagnosis	Use this field to select which Diagnosis Codes you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Rendering Provider	Use this field to select which Rendering Providers you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Facility	Use this field to select which facilities you want to include. • Click the green Plus icon to include or exclude this filter. When the filter is excluded, the Plus icon will appear gray. • Click the red X icon to clear the field.
Apply button	Click this button to apply the filter. The results will appear in the AR Tracker screen.
Clear button	Click this button to clear the screen and create a new filter.
Help button	Click this button to open the online Help.
Close button	Click this button to close the screen.

Workflow

To use the AR Tracker feature:

1. Select AR Tracker from the Activities menu. The AR Tracker screen opens.
2. Click the link in the top section to open the AR Tracker Filters screen (for more information on this screen, see "AR Tracker Filters screen" on page 7).
3. Select an existing filter or click Clear to create a new filter.
4. Make your selections for filtering information. You can save your settings by clicking Save.
5. Click Apply to run the filter. The results will appear in the AR Tracker screen.

AR Tracker field detail

The table below describes the fields and options on the AR Tracker screen.

Element	Description
Current filter link	This link shows you the current filter being used. Click this link to open the AR Tracker Filters screen (for information on this screen, see "AR Tracker Filters screen" on page 7).
Filter level tabs	These four tabs allow you to drill-down to different levels of detail. The currently-displayed tab appears indented.
Grid section The information on the grid will vary depending on your filter selections. Use the grid to collect the information you need for collecting bills. You can drill down to different tabs by either clicking the tabs or double-clicking a line item in the grid.	
Footer section	The footer at the bottom of the screen gives you totals for each column.

Right-click menu

When you right-click on a grid line on the AR Tracker screen, this menu appears. The options are described in the table below:

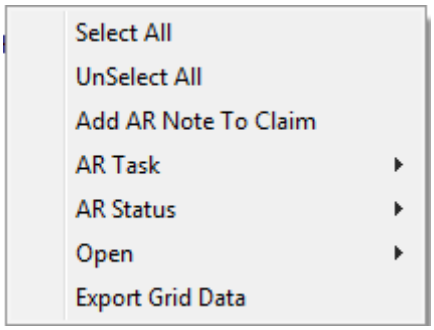

Figure 14. Right-click menu

The available options will depend on which level is in view.

Option	Description
Select All	Click this to select all items on the grid.
UnSelect All	Click this to clear all items on the grid.

Option	Description
Add AR Note to Claim/Statement	Click this option to open the AR Note screen, on which you can add a note to the AR Management Status screen. For more information, see "New AR Tracker screen" on page 4 and "Updated Claims Management" on page 19. Note that you can select more than one claim or statement and add the AR Note to them simultaneously by holding the Shift key (for a range of claims/statements) or Ctrl key (for non-contiguous claims/statements) and selecting this option.
AR Task (for all selected)	You have two options on the sub-menu: • Assign Task: Click to open a screen on which you can assign a task to the claim or statement. For more information, see "New Assign AR Task screen" on page 22. • Remove Task: Click this option to remove tasks from an insurance or statement. Note that you can select more than one claim or statement and add the AR Task to them simultaneously by holding the Shift key (for a range of claims/statements) or Ctrl key (for non-contiguous claims/statements) and selecting this option.

Option	Description
AR Status (for all selected)	You have four options on the sub-menu: • Assign Claim/Statement AR Status: Click to assign the claim or statement an AR status using the Assign AR Status screen (for more information on this screen, see "New Assign AR Status screen" on page 20). • Assign Patient/Claim AR Status: Click this option to assign an AR status to a patient using the Assign AR Status screen (for more information on this screen, see "New Assign AR Status screen" on page 20). • Remove Claim/Statement AR Status: Click this option to remove the claim or statement AR status. • Remove Patient/Claim AR Status: Click this option to remove the patient or claim AR status. Note that you can select more than one claim or statement and add the AR Status to them simultaneously by holding the Shift key (for a range of claims/statements) or Ctrl key (for non-contiguous claims/statements) and selecting this option.
Open Patient	There are two options on the sub-menu: • Open Patient: Click to open the patient's record in the Patient/Guarantor screen. • Open Insurance: Click to open the insurance record in the Insurance Carrier screen.
Export Grid Data	Select this option to export the data in the grid to a file that you can move to another computer.
Show/Hide Providers with zero balance	Select this option to show or hide providers whose balances are at $0.00. This option only appears when you are viewing the Providers tab.

After you select an option, the information on the AR Tracker will refresh automatically.

New AR Status Codes

You can create tracker Status Codes that you can assign to claims and statements.

New menu option

There is a new option on the Lists menu: AR Status Codes. Click this option to open the AR Status Code List screen, which you can use to create, edit, and delete status codes for AR tracking.

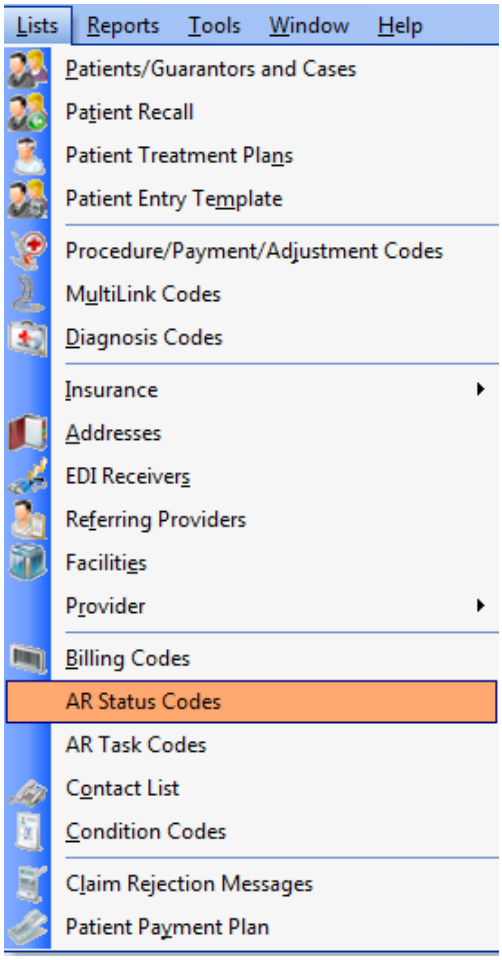

Figure 15. Lists menu

New AR Tracker Status Code List screen

This screen opens when you select the AR Status Codes option from the Lists menu. Use it to create, edit, and delete tracker statuses that you can assign to claims and statements.

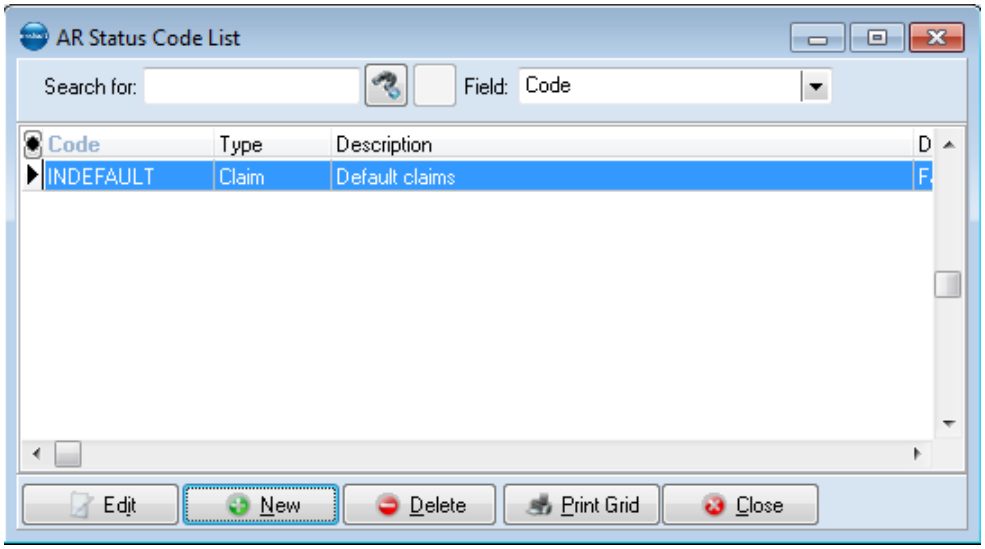

Figure 16. AR Status Code List screen

In addition, you can print the list of AR Tracker Status Codes by clicking the Print Grid button.

Selecting the New button will open a screen that you can use to create a new status.

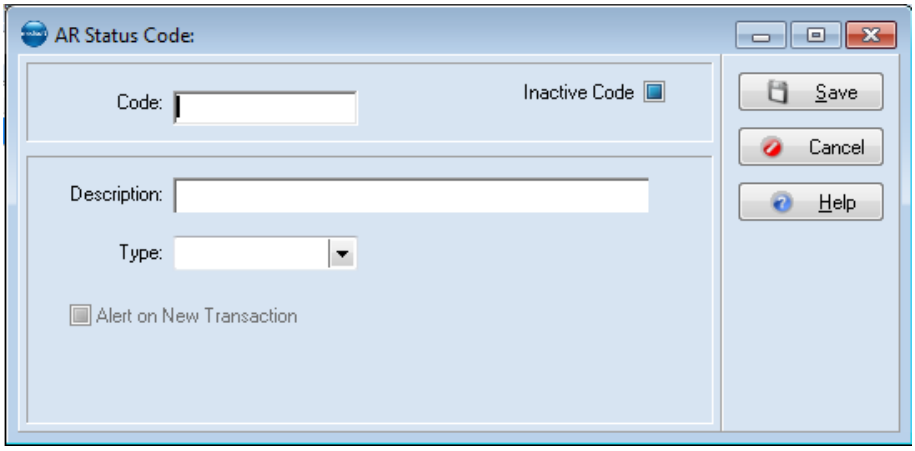

Figure 17. AR Status Code (new) screen

The table below describes the fields and options on this screen.

Element	Description
Code	Enter a code.
Inactive Code	Select the check box if you want to deactivate this code.
Description	Enter a description for the code.

Element	Description
Type	Select from the drop-down what type of code this is.
Alert on New Transaction	Select this check box if you want a pop-up message to appear when you save transactions for the patient. Note: this check box is available only when you select Patient from the Type drop-down. For more information, see “New Transaction Entry AR Status pop-up” on page 23.

New AR Task Codes

You can create tracker task codes that you can assign to claims and statements.

New menu option

There is a new option on the Lists menu: AR Task Codes. Click this option to open the AR Task Code List screen, which you can use to create, edit, and delete tasks for AR tracking.

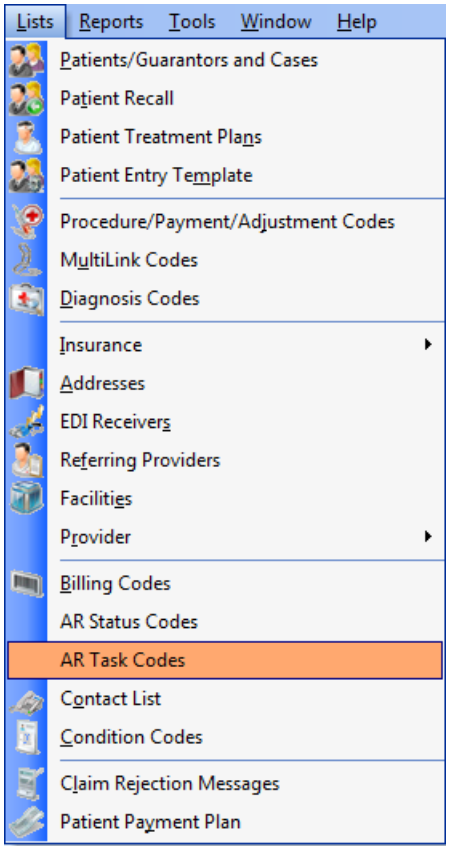

Figure 18. Lists menu

New AR Task Code List screen

This screen opens when you select the AR Task Codes option from the Lists menu. Use it to create, edit, and delete tracker tasks that you can assign to claims and statements.

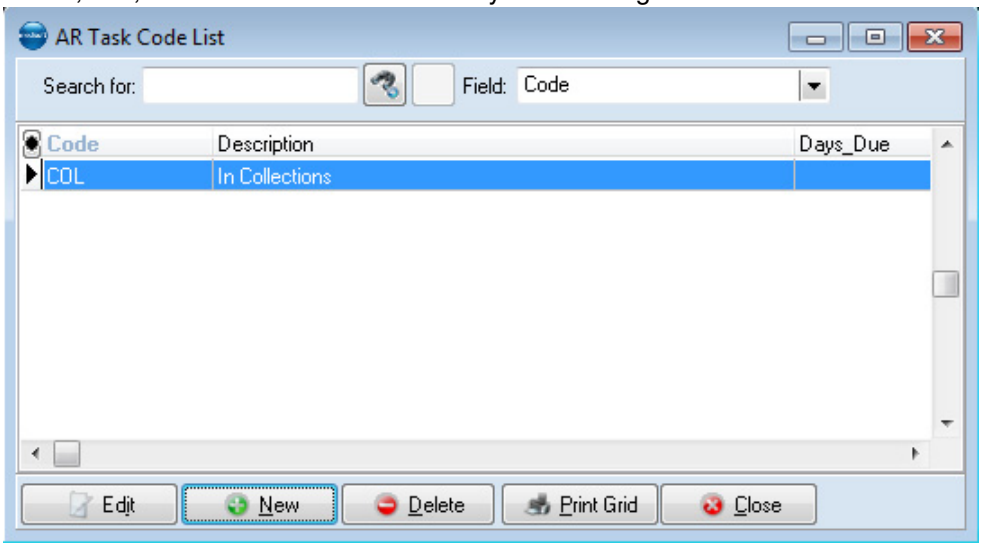

Figure 19. AR Task Code List screen

In addition, you can print the list of AR Task Codes and mark them Inactive if you no longer need them.

Selecting the New button will open a screen that you can use to create a new status.

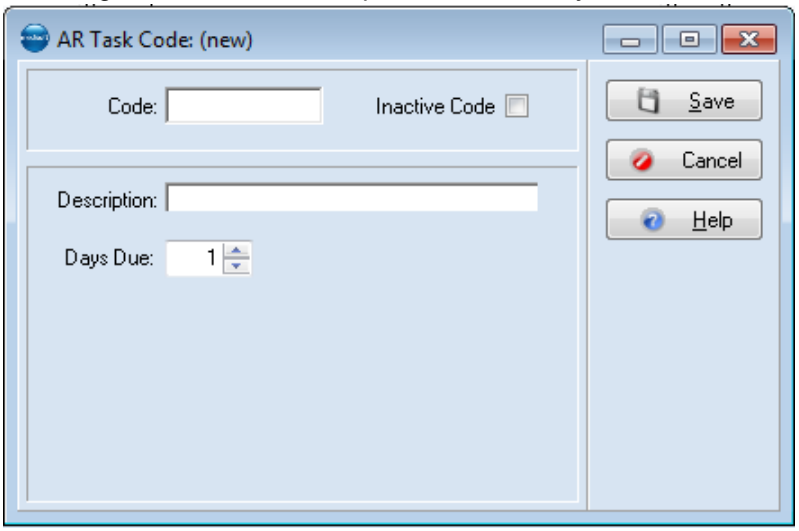

Figure 20. AR Task Code (new) screen

The table below describes the fields for this screen.

Element	Description
Code	Enter the code for this task code.
Inactive Code check box	Select this check box if you want the task code to be inactive.

Element	Description
Description	Enter a description for this task code.
Days Due	Enter the number of days before the task is due.
Save button	Click this button to save the new code or update an edited code.
Cancel button	Click this button to close the screen without saving any changes.
Help button	Click this button for information on this screen.

Updated Patient/Guarantor screen - Name, Address tab

New field

There is a new field on the Name, Address tab: AR Status. This field shows the status of the patient for AR purposes. This field is set on the Assign AR Patient Status screen (for more information, see "New Assign AR Status screen" on page 20) or you can add or change it here.

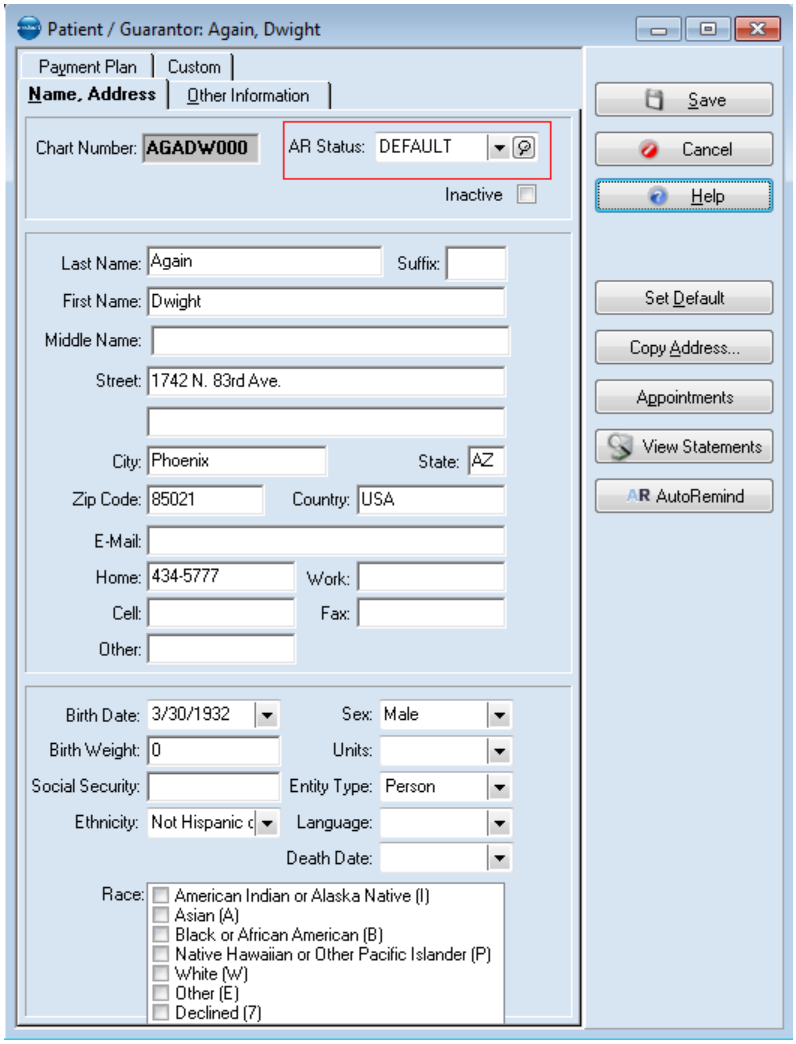

Figure 21. Patient/Guarantor screen - Name, Address tab

Updated Claims Management

New tab

There is a new AR Management tab in Claims Management. Use this tab to assign a status, task and user or Note, to a claim.

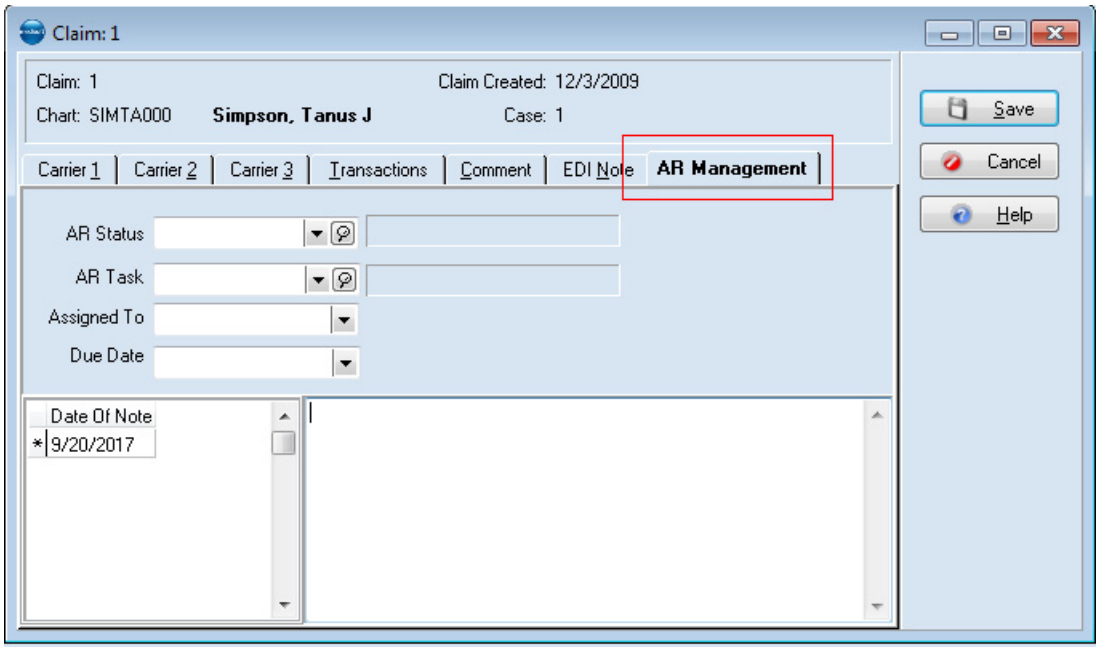

Figure 22. Claims Management screen - AR Management tab

The table below describes the fields and options on this tab.

Element	Description
AR Status	Select an AR Status from the drop-down or perform a search.
AR Task	Select an AR Task from the drop-down or perform a search.
Assigned To	Select a user whom you are assigning the task to.
Due Date	Enter a due date for the claim.
Date of Note	Enter a date for any note you add to the claim.
Note box	Use this box to type in notes.

Updated Statement Management

Use this tab to assign a status, task and user or Note, to a statement.

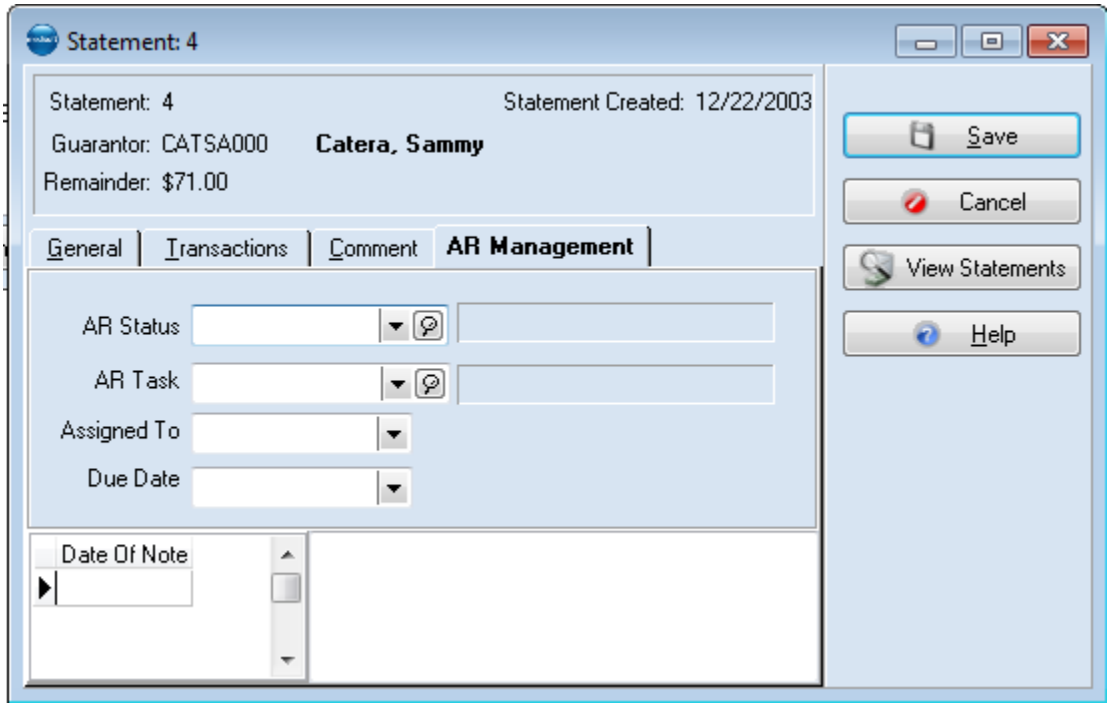

Figure 23. Statement Management - AR Management tab

The table below describes the fields and options on this tab.

Element	Description
AR Status	Select an AR Status from the drop-down or perform a search.
AR Task	Select an AR Task from the drop-down or perform a search.
Assigned To	Select a user whom you are assigning the task to.
Due Date	Enter a due date for the statement.
Date of Note	Enter a date for any note you add to the statement.
Note box	Use this box to type in notes.

New Assign AR Status screen

Use this screen to assign either a patient AR status, claim AR status, or Statement AR status to a patient, claim, or statement.

- When you assign a patient AR status, it will appear on the Patient's record at the top of the Name, Address tab.
- When you assign a claim AR status, it will appear on the AR Management tab of the claim.

- When you assign a statement AR Status, it will appear on the AR Management tab in Statement Management.

The AR Status field on this screen will filter automatically based on your selection from the right-click menu of AR Tracker, either

- Assign Patient AR Status
- Assign Claim AR Status
- Assign Statement AR Status.

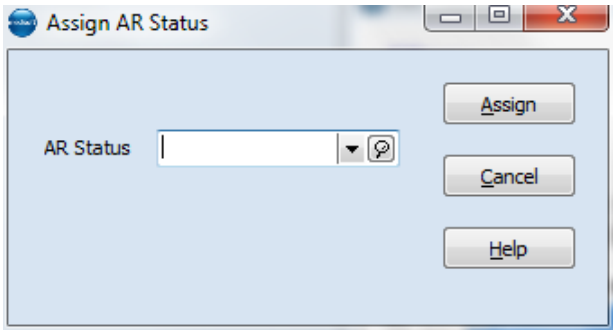

Figure 24. Assign AR Status screen

Select the status from the drop-down and click Assign. The claim, statement, or patient record will be updated.

New Create New AR Note screen

Use this screen to create notes for a claim. This screen will open when you select Add AR Note to Claim from the right-click menu on the AR Tracker screen while you have selected a claim on the Claims tab.

Enter your note and click Save. The note will appear in the notes section of the AR Management tab of Claim Management (for more information on this tab, see "Updated Claims Management" on page 19). You will see a small pop up screen notifying you that the note(s) were added.

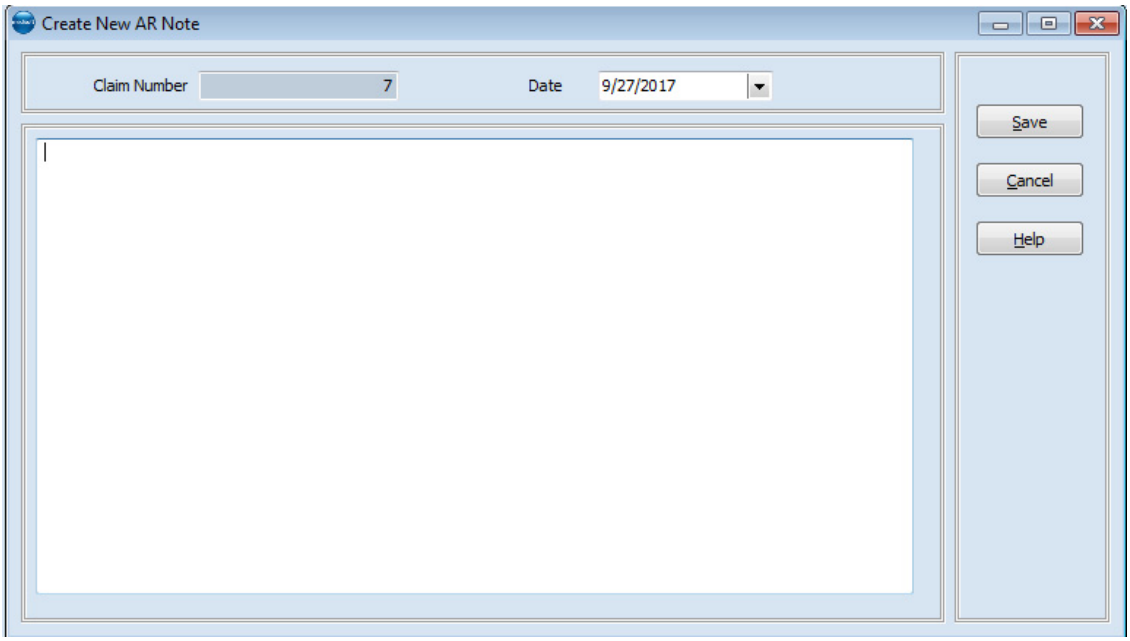

Figure 25. Create New AR Note screen

In addition, you can attach the same note to more than one claim at a time. Highlight which claims you want the note to be attached to, right-click, and select Send AR Note to Claim. After you save the note, it will appear on the AR Management tab of all claims you selected.

New Assign AR Task screen

When you select Assign Task from the right-click menu on the AR Tracker screen, the new Assign AR Task screen appears. Use this screen to assign a selected task to an individual. You can also set a date when the user must complete this task.

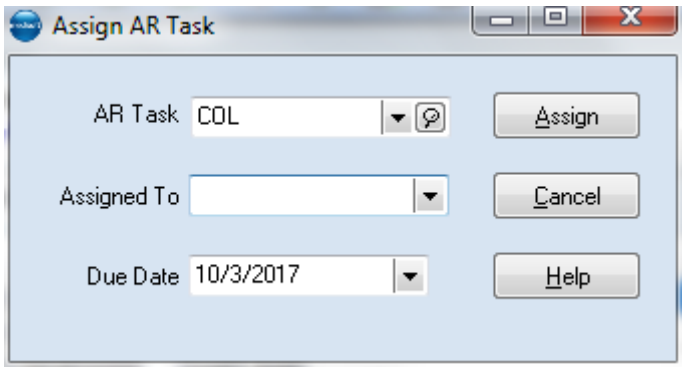

Figure 26. Assign AR Task screen

New Office Hours AR Status

You can now see the patient's AR Status in Office Hours. It appears in the left column under the calendar.

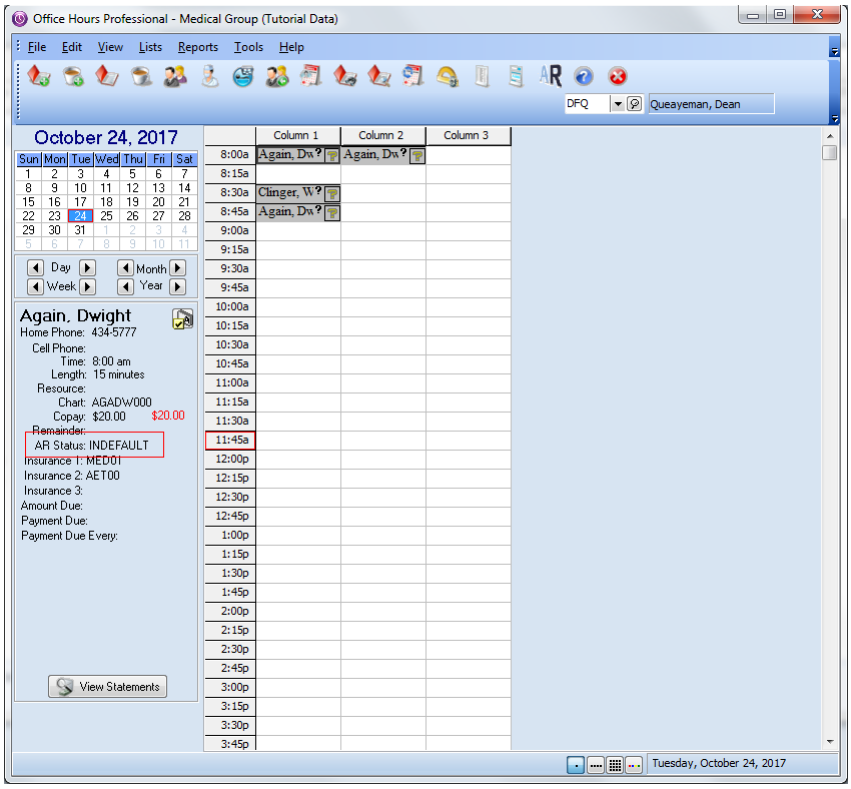

Figure 27. Office Hours

New Transaction Entry AR Status pop-up

When you have assigned an AR Status to a patient that has Display on New Transaction selected, you will see a pop-up message when you close or save the transaction.

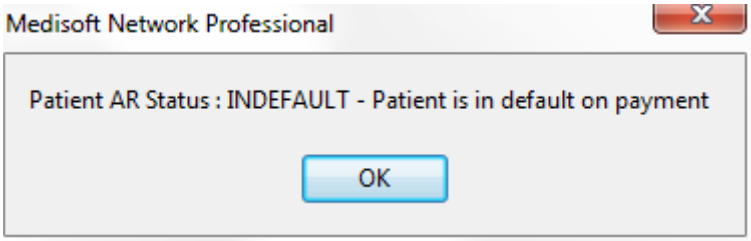

Figure 28. AR Status Transaction Entry pop-up

CPT Code Search

There is a new CPT Code search feature that allows you to search for CPT/Procedure codes and add them to your practice.

Note: This is an add-on feature to Medisoft 22 and will work only for Medisoft 22. For information on purchasing CPT Code Search, contact your Value-Added Reseller. Once you purchase CPT Code Search, you must register it to activate it.

In addition, Internet is required on your server to use CPT Code search. Client workstations do not need Internet access if the server computer has Internet access.

If you are registered, Lytec will refresh the codes on the 1st of the month (specifically, the first time someone launches CPT lookup on or after the 1st of each month).

Registration for a code year will change versions on the first day of the calendar year. At that time you will need to add your serial number on the registration screen to reactivate the CPT search screen.

With this feature, you can add either

- A single code--Find CPT button on the Procedure/Payment/Adjustment Code screen
- Multiple codes--Add CPT Codes button on the Procedure/Payment/Adjustment Code List screen

Removed Encoder Pro

Encoder Pro is no longer available with this release.

Updated Procedure/Payment/Adjustment List screen

New button

There is a new button on this screen: Add CPT Codes. Click this button to open the CPT Codes Search screen, which you can use to add multiple codes simultaneously.

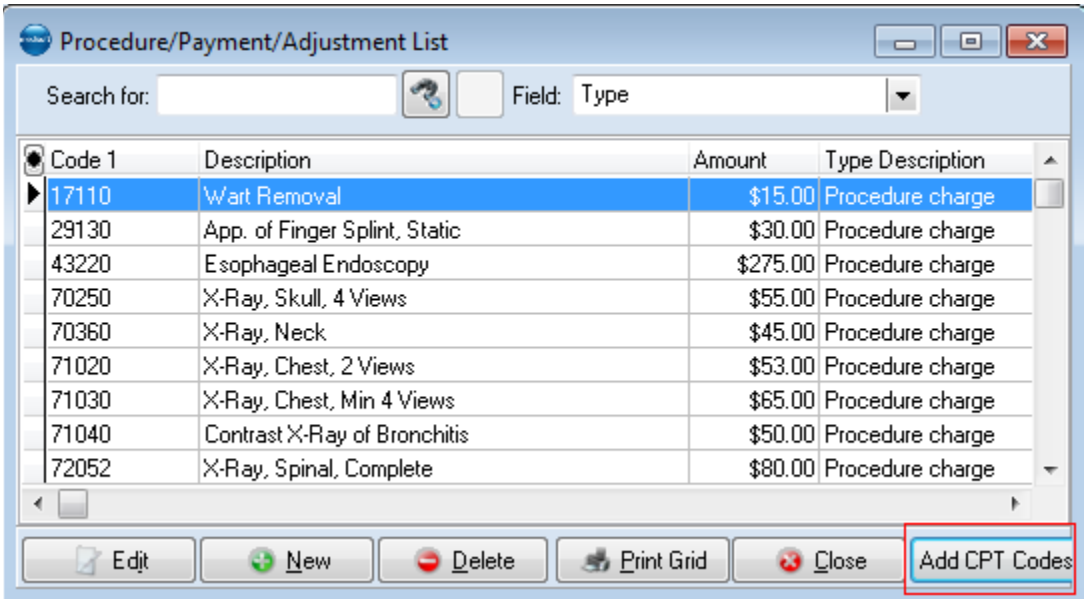

Figure 29. Procedure/Payment/Adjustment List screen

Updated Procedure/Payment/Adjustment screen (New/Edit)

New Find CPT button

There is a new Find CPT button on this screen. Click this button to open the CPT Code Search screen, on which you can add a single CPT code.

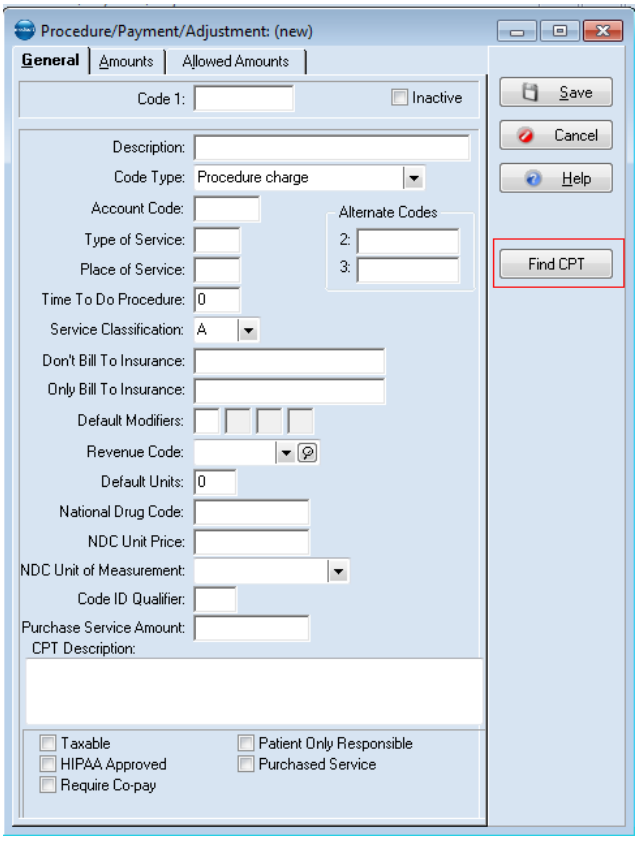

Figure 30. Procedure/Payment/Adjustment screen

After you select a code, the information will appear on the Procedure/Payment/Adjustment screen.

New CPT Description field

This new field shows you the description of a CPT code added using the CPT Code Search feature.

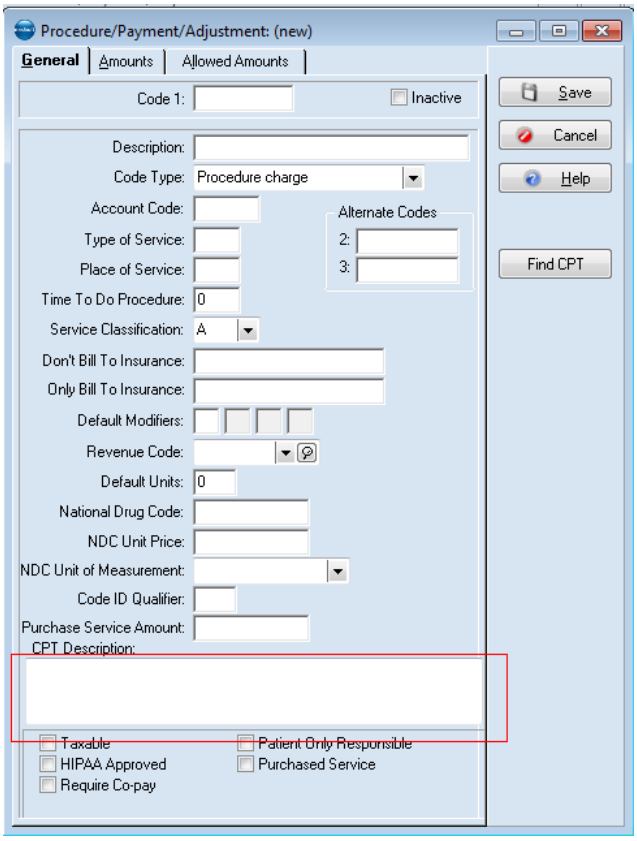

Figure 31. Procedure/Payment/Adjustment screen

New CPT Code Search screen (single code search)

Use this screen to search for a CPT/Procedure code and add it to your practice.

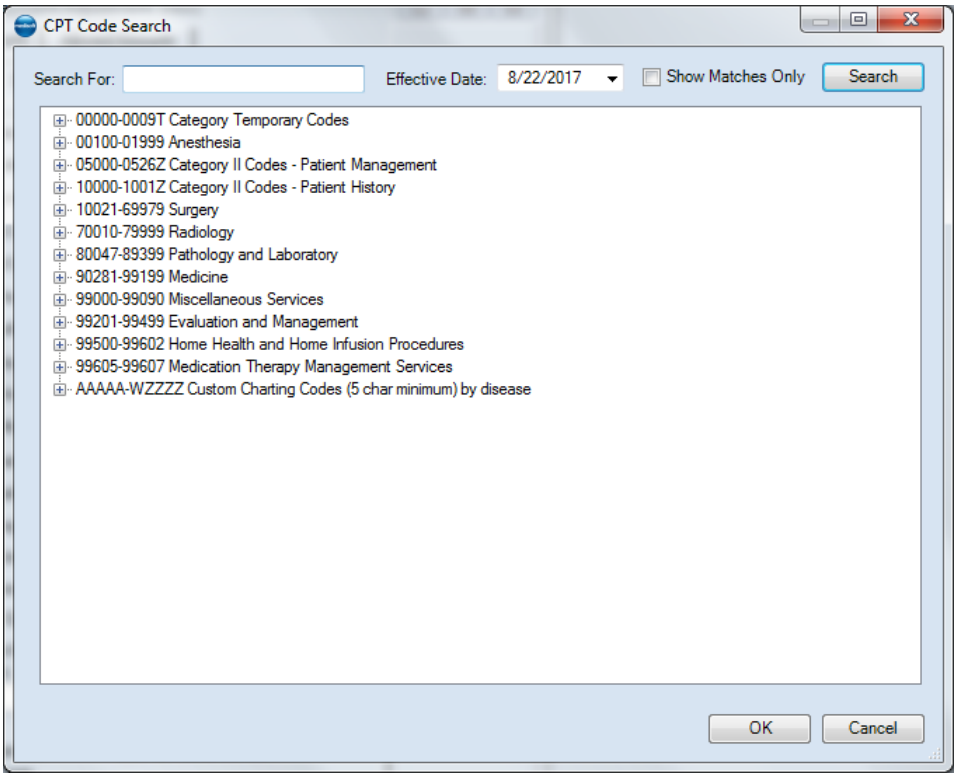

Figure 32. CPT Code Search screen

The table below describes the fields and elements on this screen.

Element	Description
Search for	Use this field to type in characters that you want to search for.
Effective Date	Select an Effective Date.
Show Matches Only check box	Select this check box if you want to see exact matches only.
Search button	Click this button to perform the search for the code you entered. When you click this button, the “tree” listing of codes in the code section will expand to show you the code you searched for.
OK button	Click this button to add the code to your list of Codes.
Cancel button	Click this button to cancel your search and close the screen.

New CPT Code Search screen (multiple code search)

Use this screen to add more than one CPT code to your code set at once.

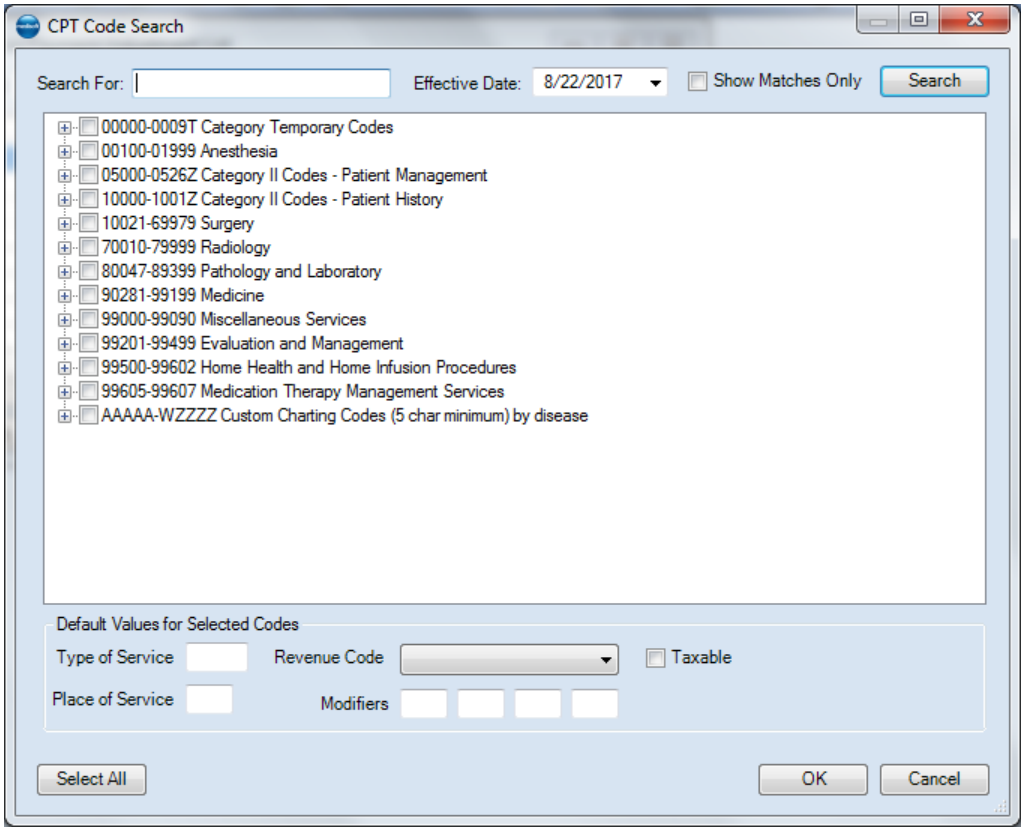

Figure 33. CPT Code Search screen (multiple code search)

The table below describes the fields and elements on this screen.

Element	Description
Search for	Use this field to type in characters that you want to search for.
Effective Date	Select an Effective Date.
Show Matches Only check box	Select this check box if you want to see exact matches only.
Search button	Click this button to perform the search for the code you entered. When you click this button, the “tree” listing of codes in the code section will expand to show you the code you searched for.
Check boxes in grid	Select the check boxes in the grid for the codes you want to add. Selecting a check box for an entire group of codes will add the entire group to your database at one time.

Element	Description
Default values for selected codes section	
Type of Service	Enter the Type of Service that will apply to the selected codes.
Place of Service	Enter the Place of Service for the selected codes.
Revenue Code	Select a Revenue Code (if applicable) from the drop-down menu.
Modifiers	Enter the modifiers that will apply to the selected codes.
Taxable check box	Select the check box if the selected codes are taxable.
Select All button	Click this button to select all of the codes in the grid. In this way, you can add the codes at one time.
OK button	Click this button to add the codes to your list of Procedure Codes.
Cancel button	Click this button to cancel your search and close the screen.

Procedures

Adding a new code on the Procedure/Payment/Adjustment Codes screen

To add a new code on the Procedure/Payment/Adjustment Codes screen

1. On the Lists menu, select Procedure/Payment/Adjustment Codes. The Procedure/Payment/Adjustment Codes screen opens.
2. Click the **New** button.
3. Click the **Find CPT** button. The CPT Code Search screen opens.
4. Enter the code you are searching for in the Search For field.
5. Click the **Search** button. The code will appear in the section below, with the code tree opening to show you the code and its description.
6. Highlight the code and click the **OK** button. The code will appear in the Procedure/Payment/Adjustment (new) screen.

Adding multiple codes from the Procedure/Payment/Adjustment List screen

To add multiple codes at once:

1. On the Lists menu, select Procedure/Payment/Adjustment Codes. The Procedure/Payment/Adjustment Codes screen opens.
2. Click the **Add CPT Codes** button. The CPT Code Search screen opens.
3. Enter a code to search for or use the code tree in the grid to find a group of codes to add.
4. Select the check boxes to the left of the codes you want to add.

5. Enter additional information for Type of Service, Place of Service, Modifiers, and so on, as necessary.
6. Click the **OK** button. The codes will appear in the Procedure/Payment/Adjustment List screen.

Revenue Management

Revenue Management has been upgraded to version 2218.

New Receiver

You can now select Trizetto as a receiver in Revenue Management.

Updated Connection Wizard option

You can now select Trizetto from the Connection screen in the Connection Wizard.

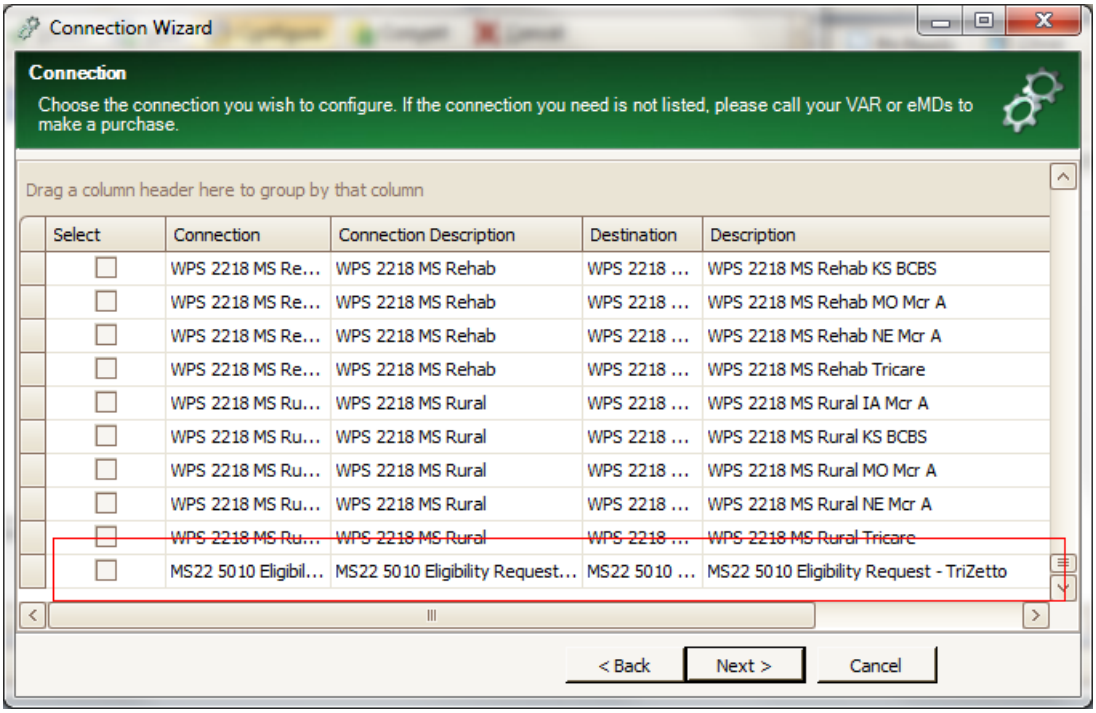

Figure 34. Connection screen

Updated New Receivers

You can now select Trizetto from the New Receivers screen in the Connection Wizard.

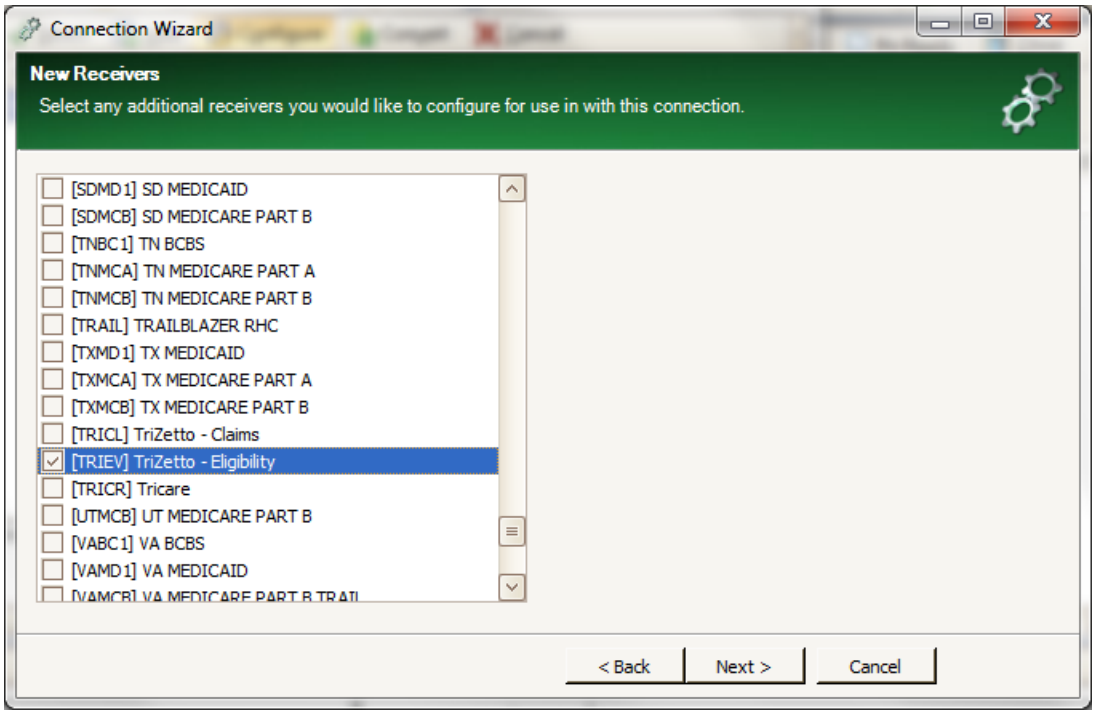

Figure 35. Receivers screen

Updated Receivers to Add option

You can now select Trizetto from the Receivers to add screen when using the Receivers screen.

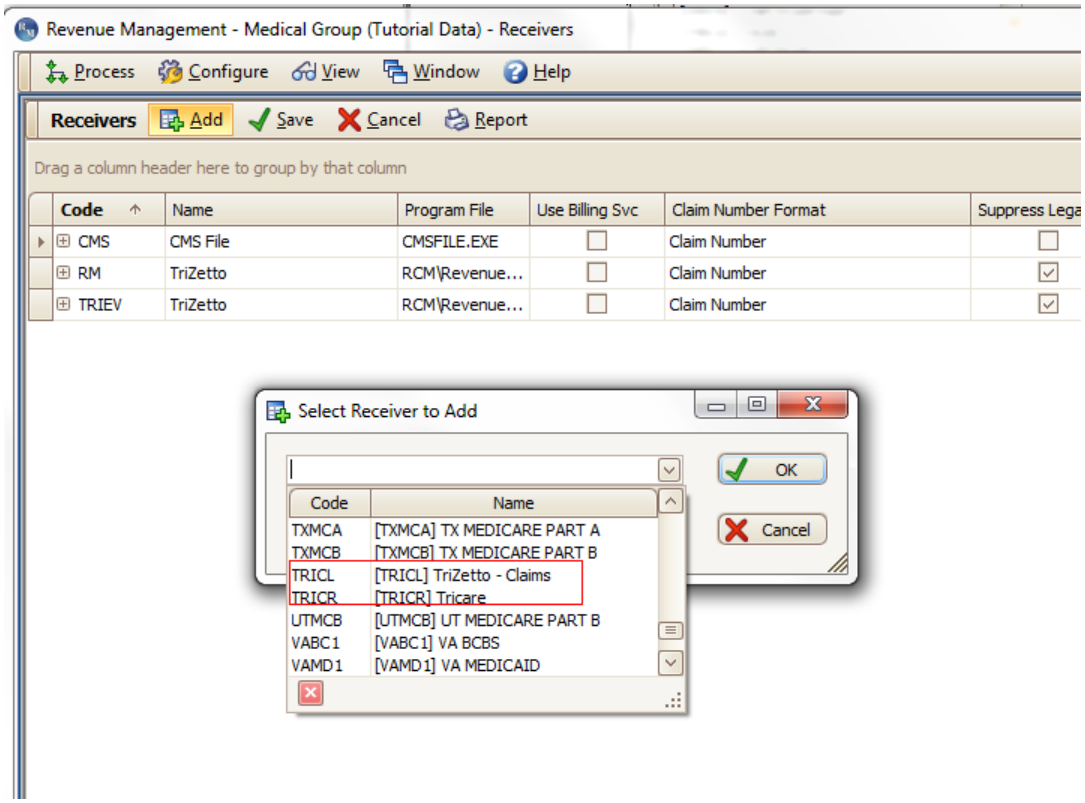

Figure 36. Receivers to add screen

Updated Communications session option

You can now select Trizetto from the Communications screen.

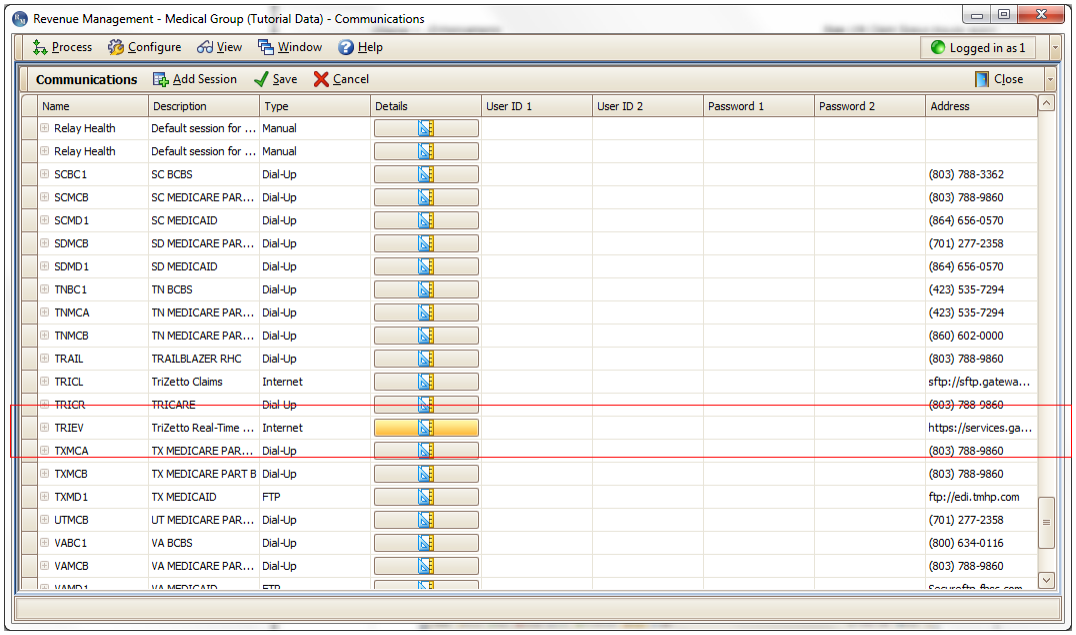

Figure 37. Communications screen

New 276 Claim Status Inquiry report

You can now generate a 276 Claim Status Inquiry report. Use this report to verify the status of a claim submitted previously to a payer. In Revenue Management, select Send > Status Requests > Receiver.

At this time the files cannot be electronically sent to the payer; therefore, once the claim files are created, manually upload them to the clearinghouse. Once the files have been processed by the clearinghouse, download the responses from the clearinghouse and place them in Revenue Management's practice download folder.

Note: Claims must have the status of Sent in Claim Management or they will not appear.

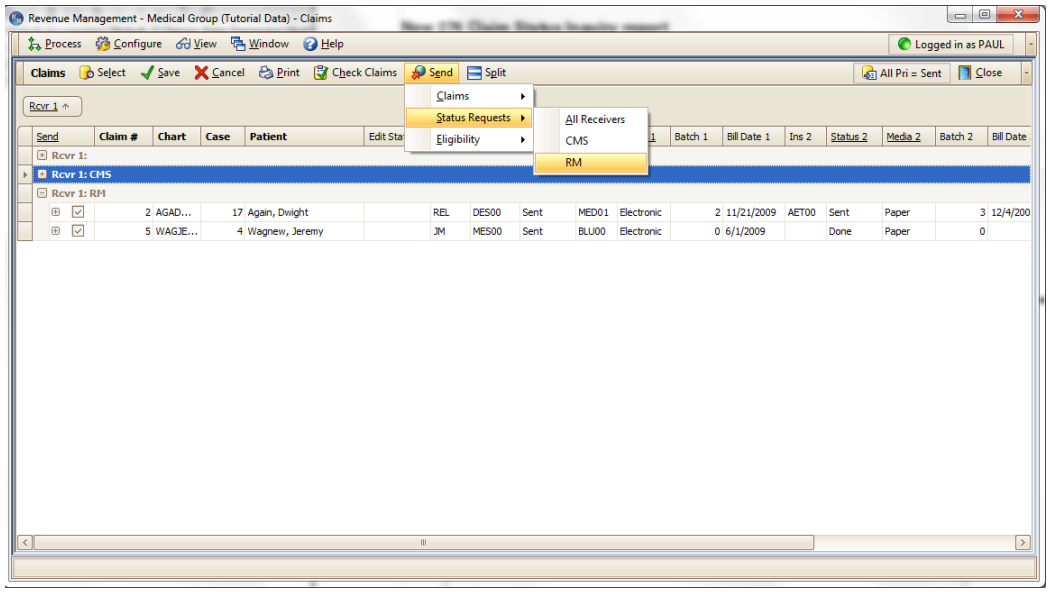

Figure 38. Claims screen

Updated Process Remittance screen

The Process Remittance screen has been updated with three new features.

New filter

You can now filter claim line items that have the post box unselected so that i can resolve any issues before posting. There is a new filter titled “Not Selected” that you can choose from the View drop-down on the Process Remittance screen. When you select this, the screen will show you all remittances that have not been selected to post, enabling you to quickly determine when you have a remittance with certain reason codes that you do not have set up to automatically post in your

preferences.This filter helps to show only those claims that have one or more check boxes unselected to not post so you do not have to look manually.

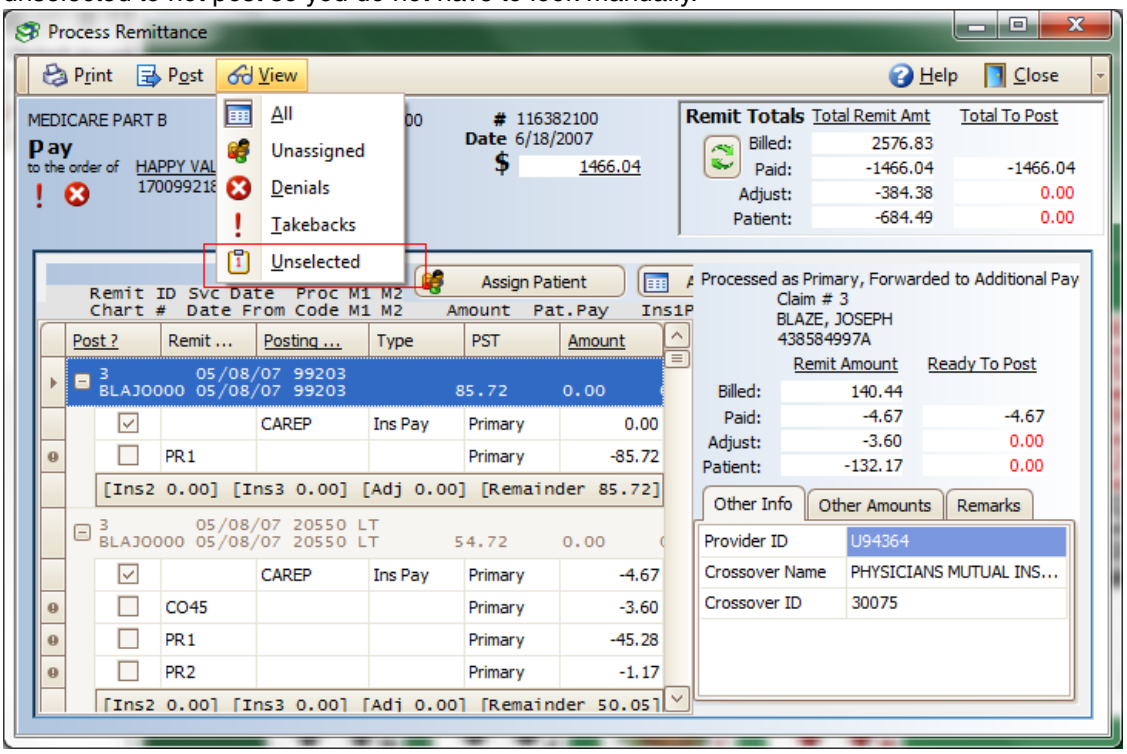

Figure 39. Process Remittance screen

New button

There is a new button on the Process Remittance screen: Save. Click this button to save a remittance that is only partially processed. This allows you to save the remit and return to it at a later time without losing your changes.

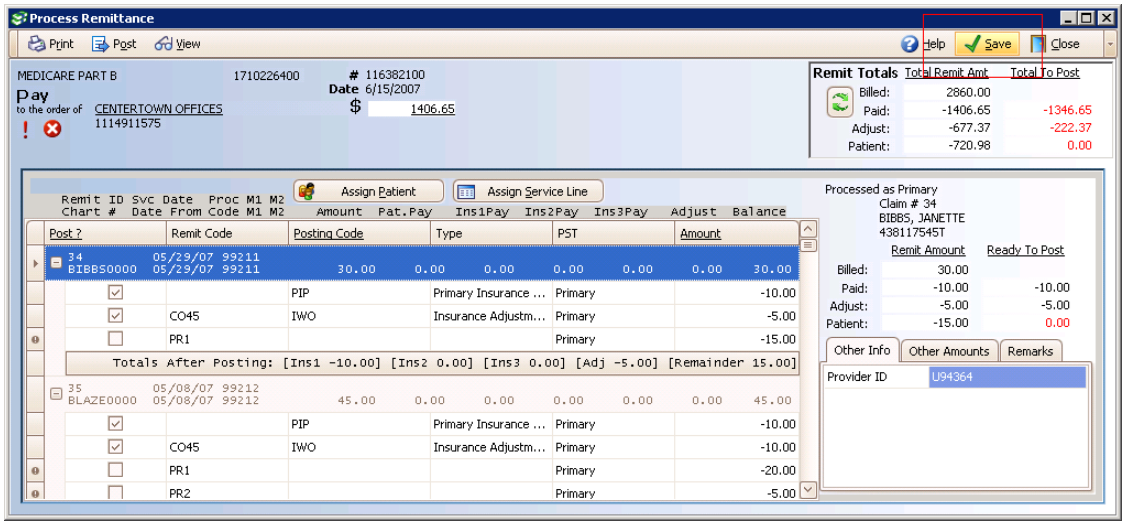

Figure 40. Process Remittance screen

You can also save the remittance when you attempt to close the screen without posting. Click Yes on this screen.

Figure 41. Not Posted pop-up

New column

There is a new column on the list of remittances for processed remittances: Last Saved. This column will show you the date that the remittance was last saved.

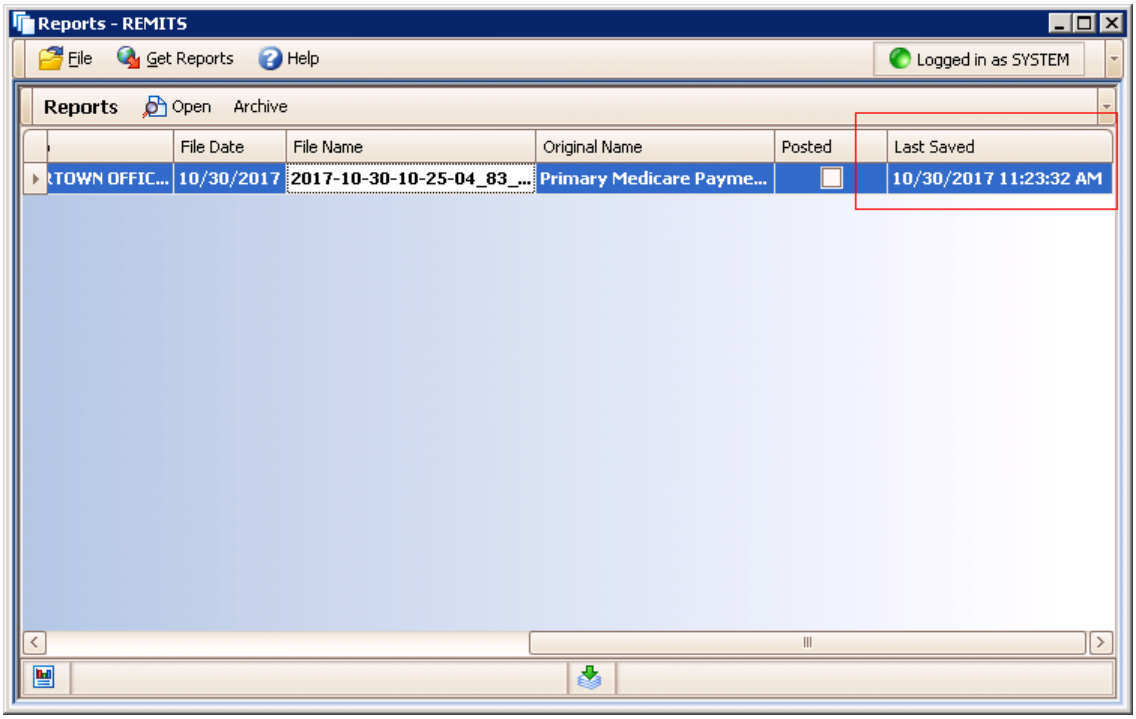

Figure 42. Reports

Note: if you save this remittance more than once, the report will show you only the date that it was last saved. If you have not saved the remittance, the date will default to 01/01/0001.

New button

There is a new button on the Process Remittance screen: Print Details. Use this to print a single patient's remittance for a single claim, making it easier to print a remittance for attachment to secondary claims. Use this when you bill secondary claims on paper and need to attach a paper

EOB of the primary insurer's payment and adjustment information. Now, you do not have to print out pages you do not need to submit.

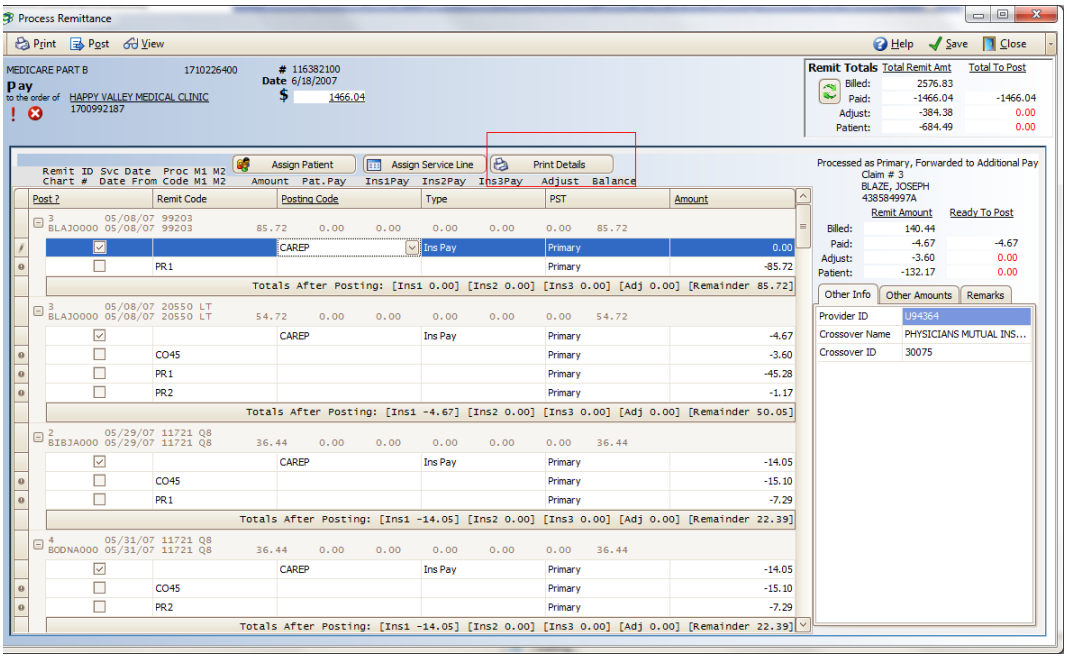

Figure 43. Process Remittance screen

Medical History

You can now edit the Medical History Questionnaire form from within Medisoft.

New Option

There is a new option: Medical History Questionnaire.

To open this option, select Mobile from the Tools> Services menu. Then, click the Medical History Questionnaire button.

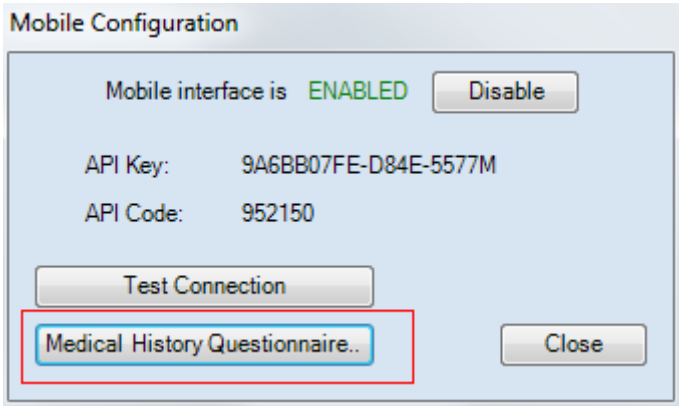

Figure 44. Mobile Configuration screen

Medical History Questionnaire

You can revise and modify the Medical History Questionnaire that patients will see when they complete the forms during Patient Intake using a mobile device.

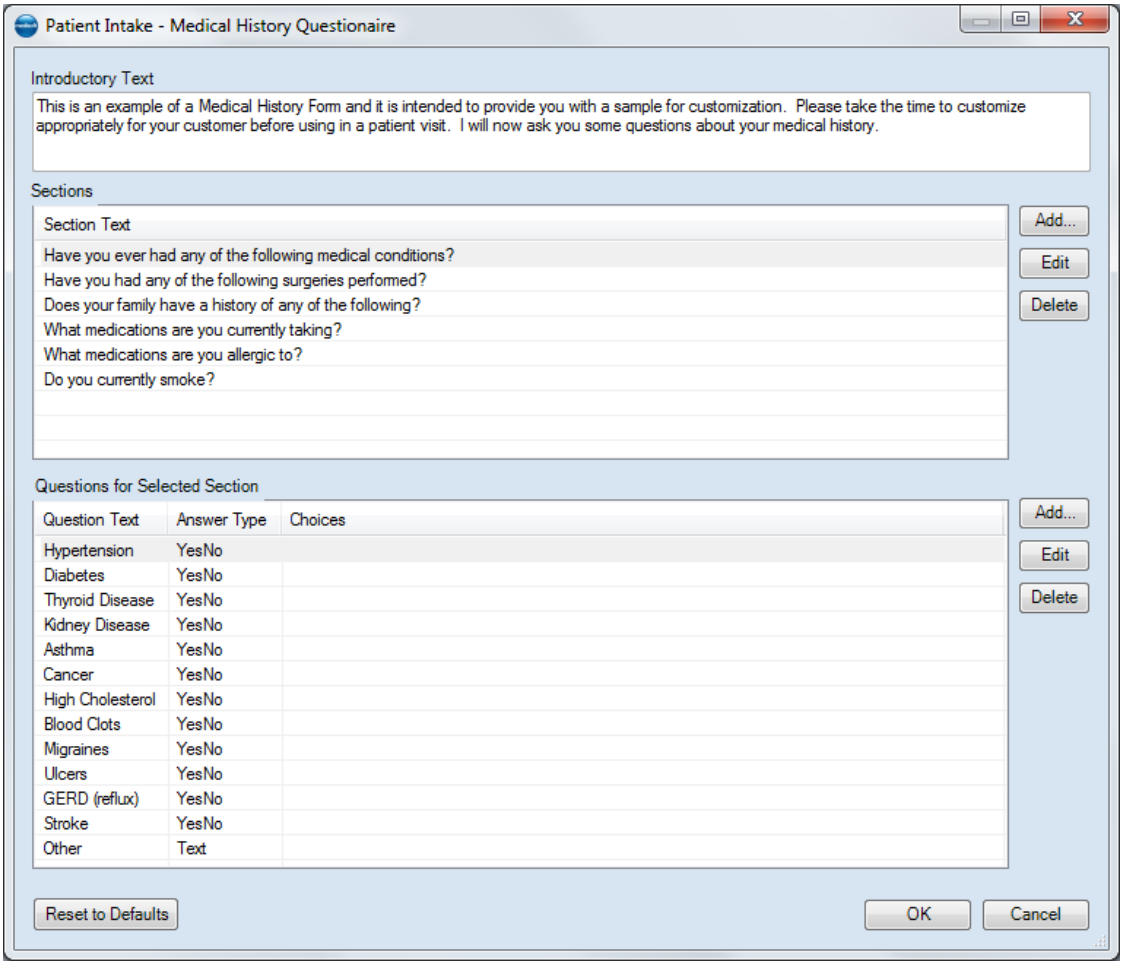

Figure 45. Patient Intake - Medical History Questionnaire screen

The table below describes the fields and options on this screen.

Element	Description
Introductory Text	Use this section to enter text that you want patients to see when they complete the medical history section of patient intake.
Sections	
Section Text	This area shows you the sections of the medical history questionnaire that have been created.
Add button	Click this button to add a new section to your questionnaire. When you click this button, the Add New Section screen appears. Enter your text for the section and click OK to add the section.

Element	Description
Edit button	Click this button to make changes to an existing section. When you click this button, the Edit Section Text appears. Modify the existing text and click OK to save the change.
Delete button	Click this button to remove a section from the questionnaire. You will see a confirmation screen to remove the section.
Questions for Selected Section Select a section from the Section Text area and then use this grid to add, change, or remove questions from that section.	
Question Text column	This shows you the text for the question.
Answer Type column	This shows you the answer type. You have three choices: • Yes/No • Text • Picklist For more information, see “New Add New Question screen” on page 40.
Choices column	If the Answer Type is Picklist, you will see the potential choices that the patient can select.
Add button	Click this button to add a new question for the selected section. When you click this button, the Add New Question screen will open (for more information, see “New Add New Question screen” on page 40).
Edit button	Click this button to make changes to the question for the selected section. When you click this button, the Edit Question screen will open. The options on this screen are the same as those for the Add New Question screen.
Delete button	Click this button to remove a question from the selected section. You will see a confirmation screen.
Reset to Default button	Click this button to reset the questionnaire to its default form.
OK button	Click this button to save the changes you have made to the questionnaire.
Cancel button	Click this button to cancel the changes you have made and close the screen.

New Add New Question screen

Use this screen to add new questions to a selected section of your medical history questionnaire.

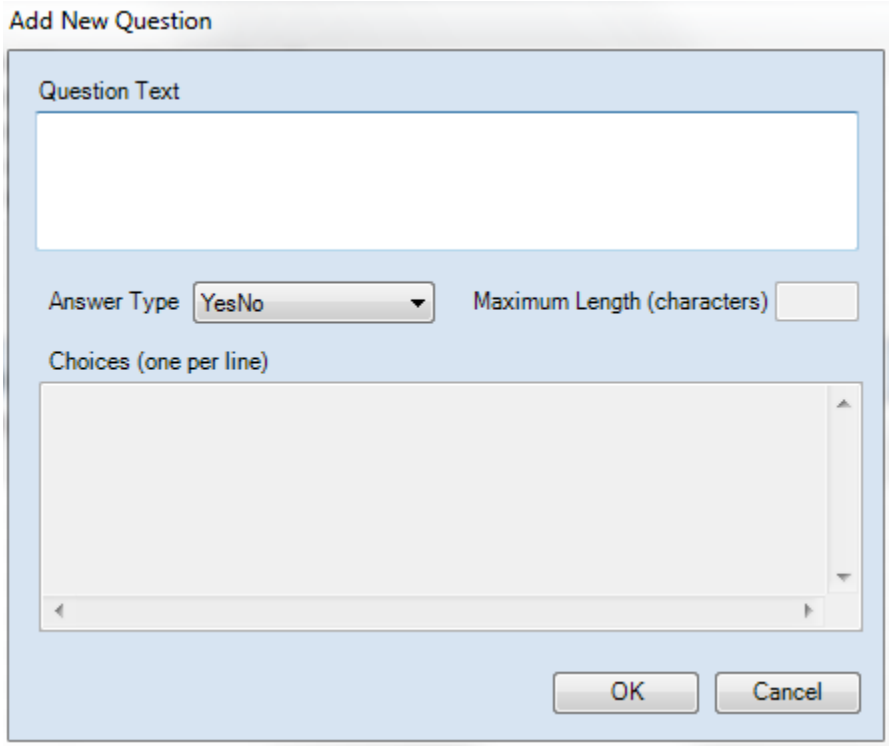

Figure 46. Add New Question screen

The table below describes the elements on this screen.

Element	Description
Question Text	Use this field to enter the text of the question that will appear on the questionnaire.
Answer Type	Use this field to select the type of answer that the questionnaire will require. The options are: • Yes/No--The patient will be required to select either Yes or No for the question. • Text--The patient will enter text into the field to answer the question. • Picklist--The patient will select an option from a list you create here. When you select this option the Choices section below will be enabled.
Maximum Length (characters)	Use this field to specify the maximum length of Text type questions.

Element	Description
Choices	This section will become active when you select Picklist as your Answer Type. Enter the choices that the patient can choose from, typing one per line. NOTE: Whatever you enter on the first line of the Question Box will appear as the default item in the Medical History form. eMDs recommends that you enter text such as “Please Select” or “Select” as the first line in the Question Text box. In this way, there will be no default item.
OK button	Click this button to save the new question and close the screen.
Cancel button	Click this button to cancel a new question and close the screen.

Practice Choice Configuration

Renamed Option

The option “Mobile” on the Help menu has been renamed to Practice Choice Configuration. Previously, this option was used to create an API Key and API Code to interface Medisoft Mobile with your practice. The option to create the Key and Code is now found on the Tools menu, under Services > Mobile Configuration and uses the Mobile 3.0 Service.

Now, the Practice Choice Configuration option is only for users who want to interface Medisoft with Practice Choice, using the older Mobile 2.x service. The API Key and Code are used by eMDs implementation consultants to link Medisoft with Practice Choice.

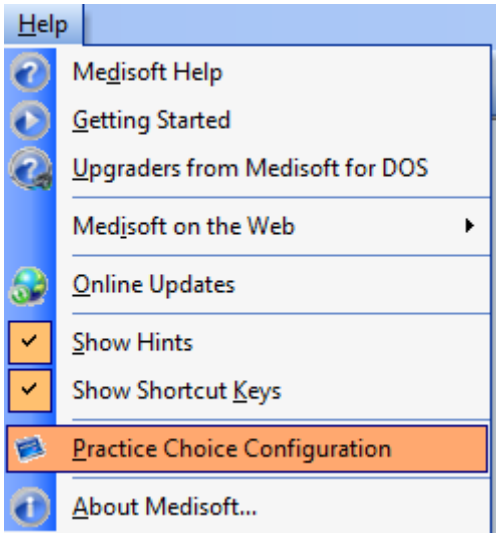

Figure 47. Help menu

In addition, the screen that opens when you click this option has changed name.

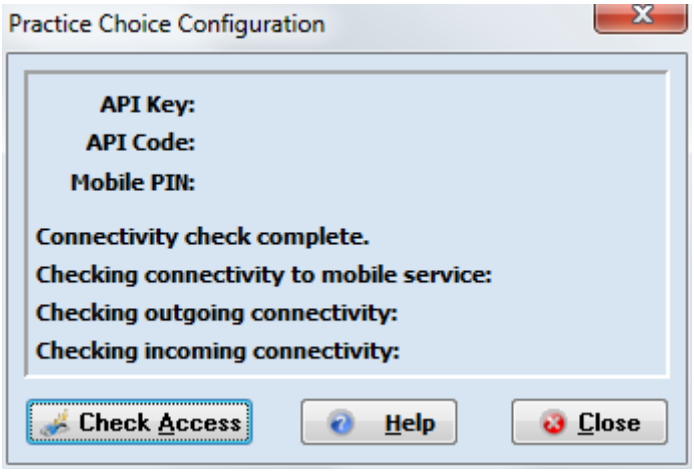

Figure 48. Practice Choice Configuration screen

End-User License Agreement

The End-User License Agreement was updated for Medisoft 22.