Medisoft 23

Release Notes

December 2018

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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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Features requiring configuration

Feature	Action required
Automated Statement Messages (see "Configuration Required" on page 10)	Update custom BillFlash statements
Automated Statement Messages (see "Configuration required" on page 13)	Set up Claim Rejection messages in new tab in Revenue Management
AR Tracker (see "Configuration required" on page 15)	Fill in Timely Filing Days field for insurance carriers

Scanning

You can now scan insurance cards, and other documents, directly into Medisoft.

Supported scanners

The scanning feature requires the use of a TWAIN-compatible scanner.

For reference, the following scanners were used in successful testing of the scanning feature. This is not an exclusive list and other TWAIN-compatible card scanners may also be compatible.

- ScanShell 800DX and 800DXN
- ScanShell 800N, 800R, 800NR
- ScanShell 1000N, 1000A, 1000NA

- ScanShell 2000N

- Ambir DS490
- Ambir DS687
- Ambir PS667
- Ambir PS600

- TTScanner

- Fujitsu 6130z

- Brother MFC 8680DN
- Canon PIXMA MX 452

Important notes:

- eMDs does not provide support for individual scanner hardware or software questions.
- if you are working with Terminal Services or a Remote Desktop Protocol, you will need additional software to connect a scanner to Medisoft, such as TSscan. Also, eMDs recommends that you close Medisoft prior to disconnecting a remote session.
- Be sure to set up and install the scanner on your computer or network before attempting to scan images from within Medisoft.
- New installations may change the previously-selected scanner. Be sure to check which scanner is selected prior to performing a scan.

Scanning tips

- eMDs recommends that you use a dedicated insurance card scanner for scanning insurance cards.
- It is always a good idea to calibrate the scanner after it is installed and clean it according to the manufacturer's recommendation.
- Since scanning images into your database will increase its size and possibly affect the performance of Medisoft, use the lowest acceptable resolution and size for your images
- When using duplex, insert the insurance card slightly off the side rail (sometimes a ¼ to ½ inch). This will cause the duplex images to be centered on the scan page. Additionally, the card should be inserted with the long-edge into the scanner, usually upside down and top-in.

Updated Case - Policy tabs

The Policy tabs now have fields and options that allow you to scan insurance cards. Once the card is scanned, you can preview the front and back images for the card.

New section

There is a new section on the Policy tabs that you can use to scan and track patient insurance cards.

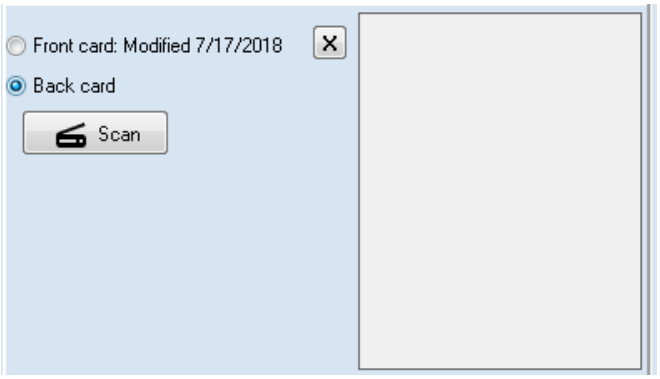

Figure 1. Case - Policy tab

The table below describes the fields and buttons on this section.

Element	Description
Front Card radio button	Select this button to scan or view the front of the insurance card.
Back Card radio button	Select this button to scan or view the back of the insurance card.
Delete icon	Click this icon to delete the selected scan. Note: These icons only appear when there is a scan for the front or back card or both.
Scan button	Click this button to scan a card or load an image from a file. Clicking this button will open the Multimedia Entry modal (for more information, see "Updated Multimedia Entry screen" on page 4). This button will be disabled if there are already two images (one for front and one for back) scanned for the policy and case. If you need to change the card, first delete the existing scans and then you will be able to scan the new card.
Preview area	This area shows you a preview of the card. This area is gray when no image is selected. Clicking the image will display the image in the multi-media modal.

Scanning tip

If you accidentally scan an insurance card to the wrong insurance policy and no longer have access to the card, you can use the following steps to move the scans from one Policy tab to the other.

1. Open the case and the Policy tab that has the wrong scan.

2. Select the Front Card.
3. Double-click the scan in the preview pane. This will open the Multimedia entry screen.
4. Click the **Save to File** button.
5. Give the scan a name and save it.
6. Click **Cancel** on the Multimedia Entry screen.
7. Select the Policy tab where you want the scan to be saved.
8. Select the Front Card radio button and click **Scan**. The Multimedia Entry screen opens.
9. Click the **Load from File** button.
10. Find the file you saved and click Open.
11. Click **Save**. The scan appear on the Policy tab.
12. Click **Save** on the Case screen.
13. Repeat for the Back Card scan.
14. On the Policy tab that has the wrong scan, click the X button next to Front Card and Back Card to delete the incorrect scans.

Updated Multimedia Entry screen

The Multimedia Entry modal has been updated so that you can now scan an image into Medisoft from within the screen.

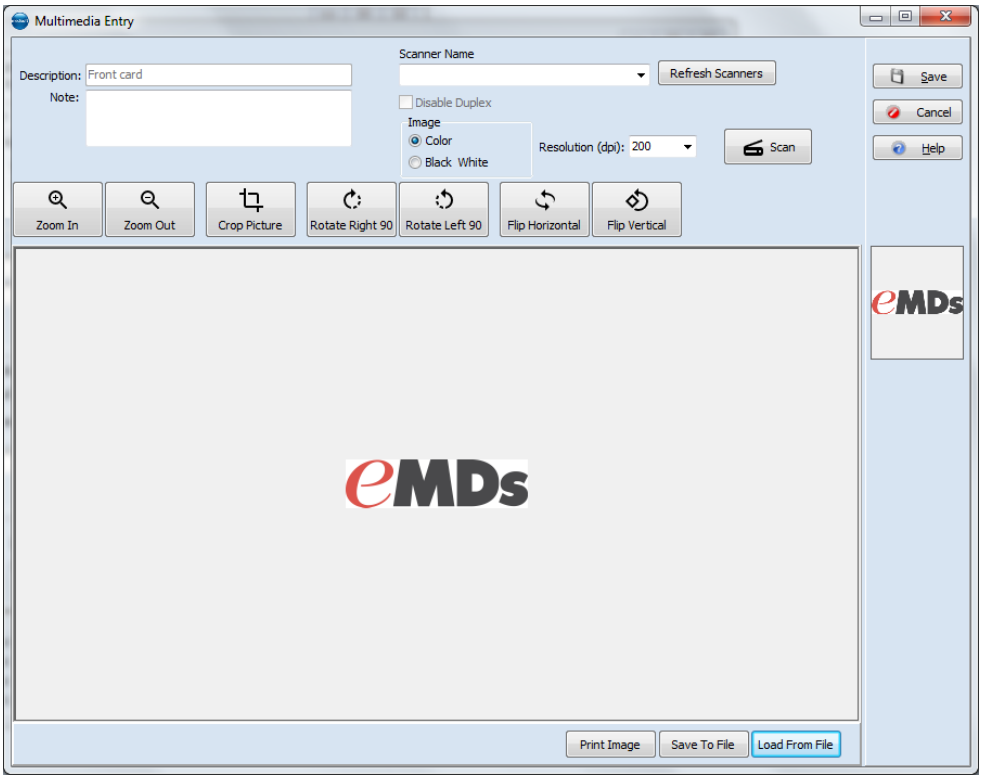

Figure 2. Multimedia Entry screen

The table below describes the elements on this screen. New elements are marked with an asterisk (*).

Element	Description
Description	Use this field to enter a description of the image you are scanning. Note: if you open this screen from a Policy tab, the description will be either “front card” or “back card”, depending on which radio button is selected on the Policy tab.
Note	Use this field to enter a note on the image you are scanning. The information you enter here will not appear on the Policy tab but will be available if you double-click the image preview on the Policy tab.
Show on Patient Screen	Select this check box if you want to scan to appear as a thumbnail on the right side of the Patient’s record. Note: this check box is hidden when you open the Multimedia Entry screen from the Policy tab. Scans made from the Policy tab are for insurance cards only.
*Scanner Name	Use the drop-down to select a scanner. Only the last-used scanner (per Windows user) will appear when you open the Multimedia Entry modal and use the drop-down. To get a full list of scanners, click the Refresh Scanners button. This drop-down will be empty until you click the Refresh Scanners button. At that time, a list of scanners will appear. Once you have scanned and saved, the scanner name will automatically appear in the drop-down. Note: scanners must be installed or set up prior to using this feature. For a list of supported scanners, see “Supported scanners” on page 1.
*Refresh Scanners button	Click this button to refresh the list of scanners that will appear in the Scanner Name drop-down.

Element	Description
*Disable duplex check box	Select or clear this check box when using a duplex scanner to choose single sided or duplex scanning. If the system can detect your scanner only allows single sided this will be disabled. If you clear this check box, the scanner will scan both sides of the document and create a single image with both sides. if you opened the Multimedia Entry modal from a Policy tab, the combined image will be placed in the selected option on the Policy tab, either front card or back card.
*Color radio button	Select this option if you want to scan in color. Note: scanning in color can increase the size of the image file. For best contrast and readability, color is the best scanning method.
*Black White radio button	Select this radio button if you want to scan in black and white.
*Resolution	Use this field to select the resolution. Note: higher resolutions will create larger image files. eMDs recommends that you use the lowest setting that creates an acceptable image.
*Scan button	Click this button to scan the image. The completed, scanned image will appear in the preview area below.
*Zoom in	Click this button to zoom in on the scanned image in the preview area. This is for viewing only. You cannot save the zoomed image.
*Zoom out	Click this button to zoom out on the scanned image in the preview area. This is for viewing only. You cannot save the zoomed image.
*Crop Picture	Click this button to crop the scanned image. You must select the area to be cropped before clicking this button.
*Rotate Right 90	Click this button to rotate the image right 90 degrees.
*Rotate Left 90	Click this button to rotate the image left 90 degrees.

Element	Description
*Flip Horizontal	Click this button to flip the image horizontally.
*Flip Vertical	Click this button to flip the image vertically.
Image area	This section of the screen shows you the scanned image.
Image thumbnail	The image thumbnail appears to the right of the image preview area.
Print Image	Click this button to print the image on paper.
Save to File	Click this button to save the image as a file on your computer.
Load from File	Click this button to load an image saved on your computer into the image area. In this way, you can insert a saved image into your patient's record. Note: The Load from File button will remain active after you scan a document from the Multimedia Entry screen. Consequently, eMDs recommends that you save any scan prior to using the Load from File feature/button.
Save button	Click this button to save the image in Medisoft. • If you were scanning from the Case-Multimedia tab, your image will appear on the list of images on the Case-Multimedia tab. • If you were scanning from a Policy tab, the image will appear on the Policy tab. Images are only saved to the case once when the Case is saved.
Cancel button	Click this button to undo any scan or changes to a scanned image and close the screen.
Help button	Click this button to open the Help file for this screen.

Procedures

Note: the steps may vary depending on your scanner. For some scanners you must place your document on the scanner and for others you can "feed" your documents to the scanner.

Scanning from a Policy tab

To scan an insurance card from a Policy tab:

1. In Medisoft, open the case and select the appropriate Policy tab.
2. Select either Front card or Back card.
3. Place the card on the scanner.

4. Click the **Scan** button. The Multimedia Entry screen opens.
5. Enter any note and select a scanner.
6. Complete the options and click the **Scan** button. The image will preview in the Viewing area.
7. Manipulate the image as necessary and click the **Save** button.

Deleting an image on a Policy tab

To delete a scanned card on a Policy tab:

1. Click the X icon to the right of the front card or back card radio button.
2. Click **Yes** to confirm.

Updated Copy Case

When you copy a case that has images attached to it, you will now see a Confirm popup that allows you to choose if you want to keep the images on the old case. In order to keep the size of the database down, you might want to limit the number of older cases that contain the insurance card images.

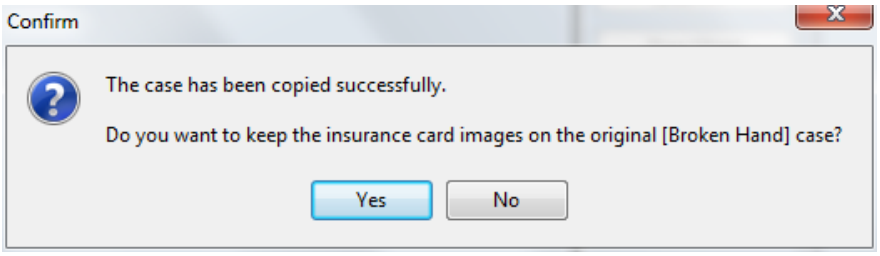

Figure 3. Confirm popup

- Clicking Yes will keep the existing images on the original case.
- Clicking No will remove the images.

A copied case must be saved before you can scan.

Note: Images on the Multimedia tab will NOT be copied to a new case. The option above applies only to keeping images on an existing case.

Automated Statement Messages

You can now generate statement messages automatically, that are assigned to transactions based on the claim reject code. In this way, patients can have the information they need on their statements. Several changes have been made to Medisoft for this feature.

Updated Transaction Documentation screen

The Transaction Documentation screen has been updated to allow multiple notes. You can now enter up to three notes for a transaction: a Transaction (internal) note, statement note, and one other note type.

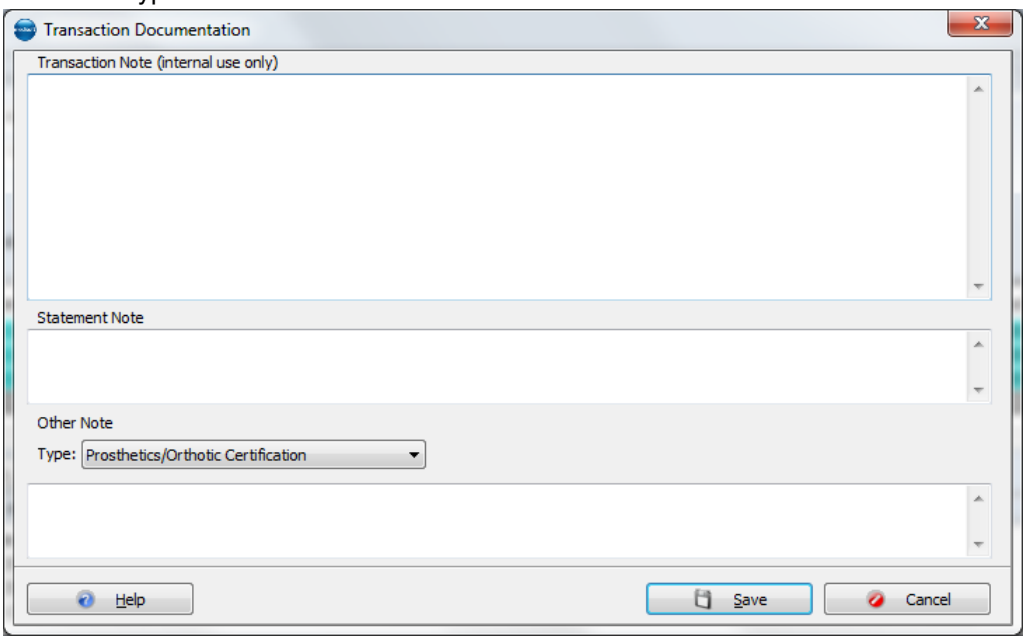

Figure 4. Transaction Documentation screen

New fields

There are new fields on this screen:

- **Transaction Note:** Use this for an internal note
- **Statement Note:** Use this for a note that will go on the patient's/guarantor's statement
- **Other Note:** Use this for another type of note. Use the drop-down to select the type. Once you select a note type, you can enter information in the Other Note field.

Note: existing notes will be placed in the correct box when you upgrade to release 23.

This screen has been updated in the following places in Medisoft:

- Patient and Guarantor Ledger
- Deposit List: Apply Payments/Adjustments to Charges (Documentation button and Note icon)
- Transaction Entry
- Unprocessed Transactions Edit

Conversion to Medisoft 23

The Transaction Note and Statement Note options have been removed from the drop-down menu for Other Note. During conversion to Medisoft 23, the Documentation field moves to the TransactionNote field when the Documentation Type is a T and to the StatementNote field when the Documentation Type is an S.

Configuration Required

If you have created custom statements, including any custom Billflash statements, using Statement Notes, you must update them to use the new Statement Note field. Otherwise, statement notes will not appear on your custom statement forms.

View Only Transaction Documentation screen

The Transaction Documentation screen appears in a View Only mode in AR Tracker.

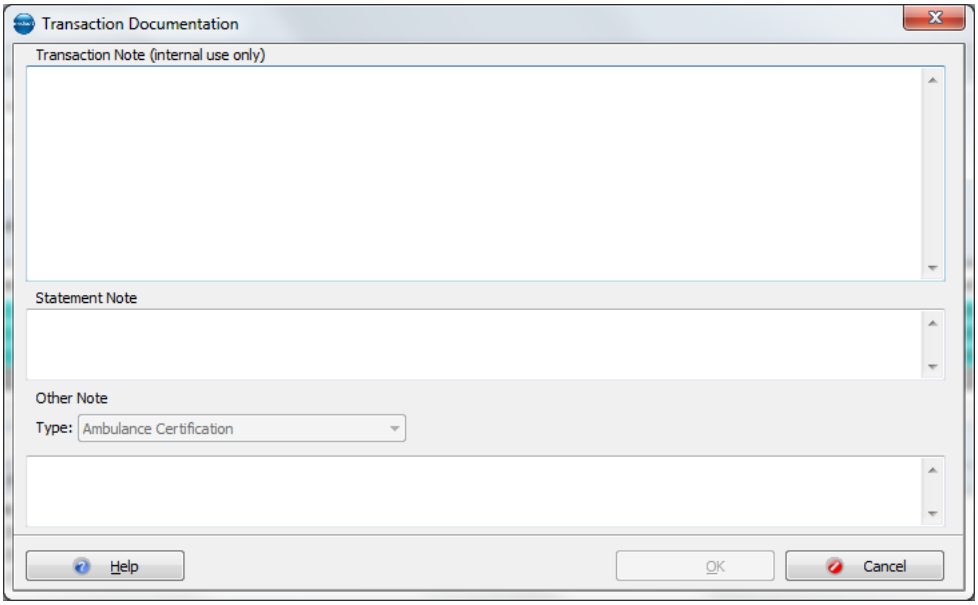

Figure 5. Transaction Documentation (View Only)

In View Only mode, the OK button is disabled, and you cannot enter or change any information.

Updated Process Remittance screen in Revenue Management

On the Process Remittance screen in Revenue Management, you can now assign and view Statement Notes.

New button

There is a new Assign Notes button. Click this button to open the Assign Note screen, on which you can enter a note for the selected line item. For more information on this screen, see "New screen" on page 11.

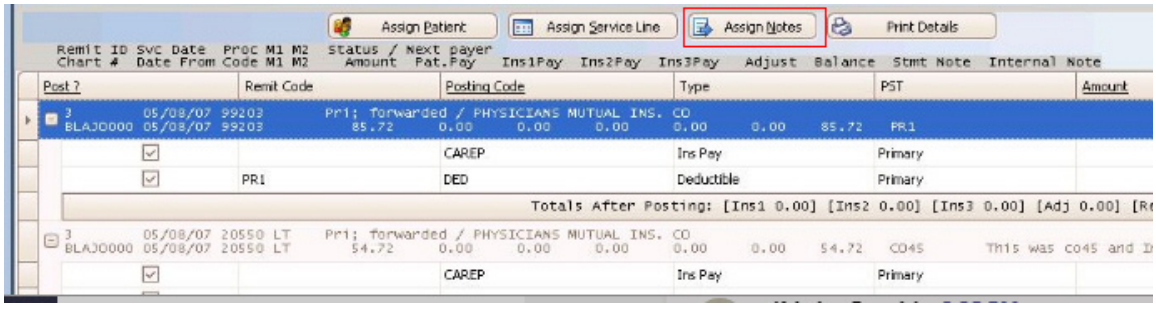

Figure 6. Process Remittance screen

New screen

There is a new screen: Assign Notes. Use this screen to create a Statement Note for the selected line item on the remittance. Statement notes added here will be added to transactions in Medisoft automatically.

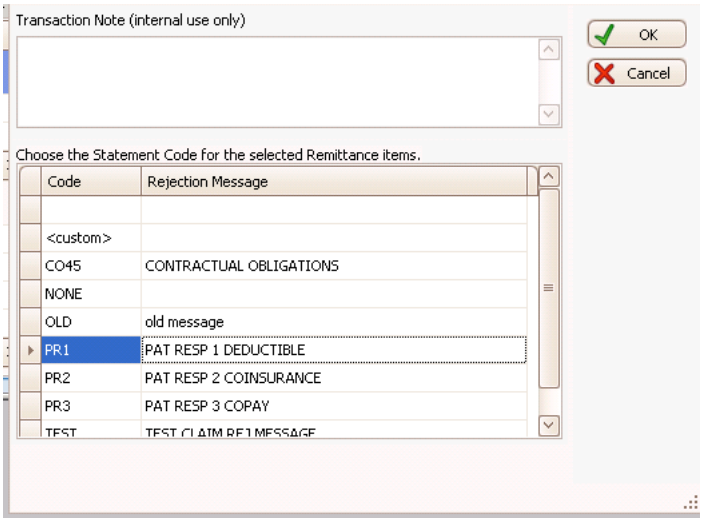

Figure 7. Assign Notes screen

Note: if you want to remove an auto-assigned statement code and will not be posting the remittance right away, use a "None" claim rejection code.

The table below describes the elements on this screen.

Element	Description
Transaction Note	Enter a Transaction note in this field if you want. This note will appear in the Internal Note column on the Process Remittance screen. This field contains a mask that only allows the following characters: a-z, A-Z, 0-9, space, period, question mark, exclamation mark, comma, forward slash, and apostrophe. Any other characters will be prevented. This field will also not import any existing transaction notes already entered on charges inside Medisoft Transaction Entry.

Element	Description
Grid	Select a Statement Code from the list. This note will appear in the new Stmt Note column on the Process Remittance screen. You can select one of the following: • blank--if you want no Statement Note • Claim Rejection message--if you want to indicate that the claim was rejected using the codes set up in Assign Statement Codes (for more information, see "New Assign Statement Codes tab" on page 13 • Custom--if you want to create a custom note • the default value on the Process Remittance screen
OK button	Click this button to save your changes. The Process Remittance screen will be updated and your selection for Statement Note will be added to the transaction in Medisoft automatically.
Cancel Button	Click this button to close the screen without saving any changes.

New columns

There are two new columns on the Process Remittance screen: Stmt Note and Internal Note. These columns will display the Statement note and Transaction Notes information that you selected using the Assign Notes screen.

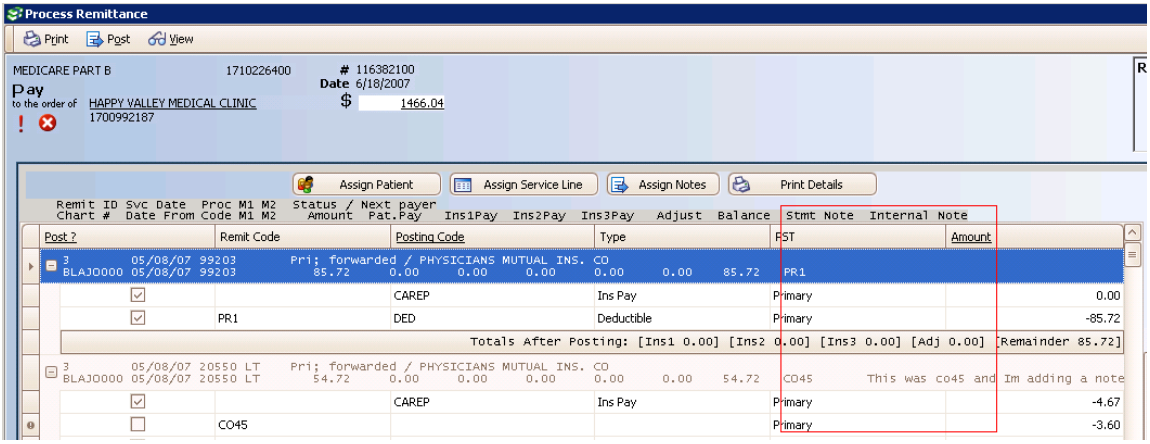

Figure 8. Process Remittance screen

New Assign Statement Codes tab

There is a new tab in Revenue Management Preferences: Assign Statement Codes. Use this tab to assign Statement codes to Reason codes.

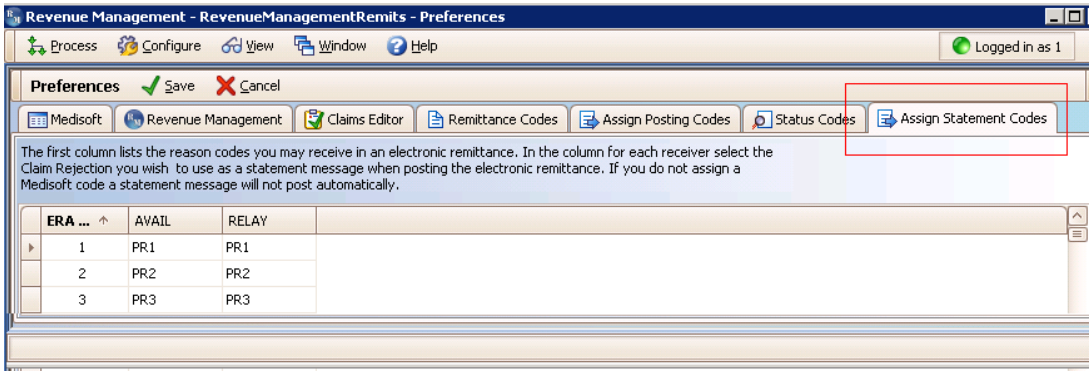

Figure 9. Assign Statement Codes tab

The table below describes the elements on this tab.

Element	Description
ERA Reason Code	This column displays the Reason Codes that you can set up for automatic notes.
Receiver Columns	The remaining columns list the receivers. Click in the field for a Reason Code and select the Claim Rejection code that you want to have added automatically to the transaction statement note. When you post the remittance, the information will be sent to Medisoft.

Configuration required

Set up this tab prior to processing remittances so that notes will flow automatically to transaction statement notes.

New Report

There is a new report for Remainder statements: Combined Pmt and Msg. This report is the same as the existing Combined Payments Remainder statement but has a line that shows any Statements Notes for the patient/guarantor.

Updated list of reports

The Open Report screen has been updated with this new report.

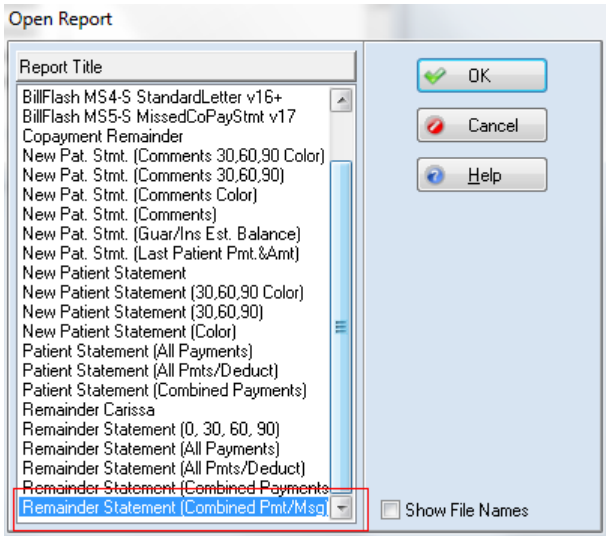

Figure 10. Open Report screen

You can access this report when printing statements or when opening Custom reports.

Note: Medisoft Basic users will open this report from Custom Reports only.

New report

The new combined Pmt and Msg shows you the Statement Note.

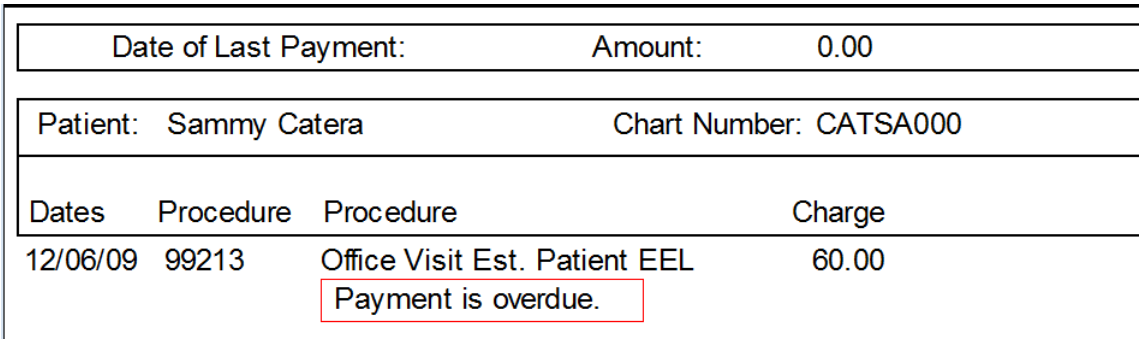

Figure 11. Combined Prnt and Msg report

Updated Apply Payment/Adjustment to Charges

Updated Popup

The popup message that appears when you select a Rejection Code has been updated and there is an existing Statement Note has been modified so that you can choose to replace the existing

Statement Note with the Rejection Code description or you can append the Rejection Code description to the existing Statement Note.

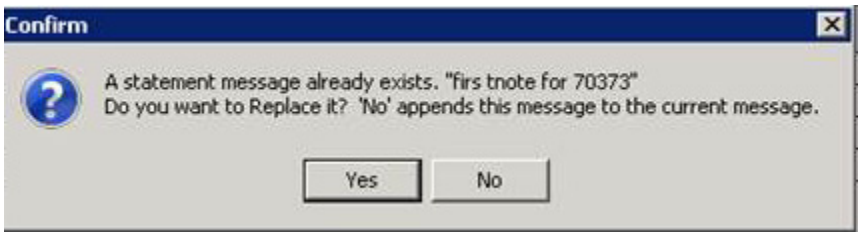

Figure 12. Confirm popup

Previously, selecting a Rejection Code would overwrite any Transactions Note if Yes was clicked on the Confirm popup. This functionality has been removed.

AR Tracker

Updates have been made to AR Tracker.

Configuration required

Prior to using this new feature, you must fill in the Timely Filing Days field for each insurance carrier in your practice.

New column

When you are viewing the Details grid for claims, there is a new column: Days to File Pri. This column shows you the number of days before the claim reaches the timely filing deadline for that insurance carrier when it is the Primary insurance.

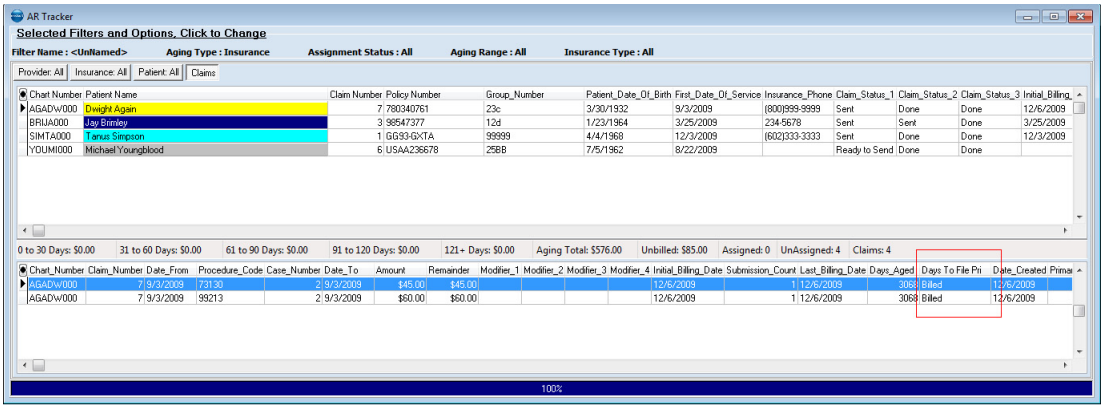

Figure 13. AR Tracker

Note: You can add the number of Timely Filing days on the Address tab of the Insurance Carrier screen.

The table below shows you the possible values that can appear in the column:

Value	Description
Billed	This value appears if the claim has been billed.

Value	Description
Overdue	This value appears if the timely days to file deadline has passed and the claim has not been billed.
Number	When a number appears in the column, it indicates the number of days remaining before the timely filing deadline is reached.
Blank column	A blank cell indicates that the Timely Filing days field in the Insurance has not been filled in or the insurance is not the primary.

Updated Patient Name field

The Patient Name field is now highlighted in the color specified in the Flag field on the Other Information tab on the Patient/Guarantor screen if the Program Option to Use Patient flags is selected on the Color-Coding tab.

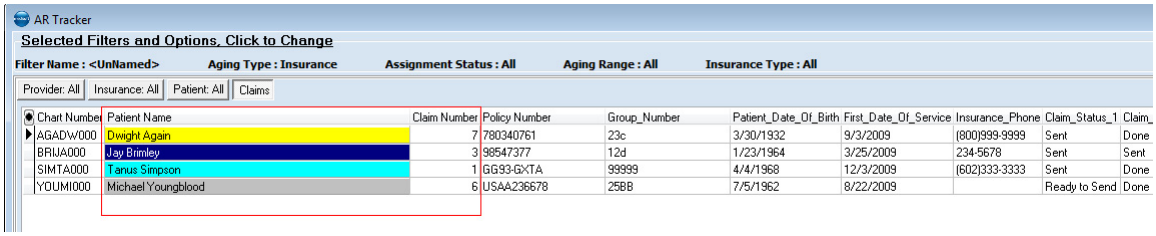

Figure 14. AR Tracker screen

The following tabs are updated:

- Patient tab--Statements
- Statement tab
- Patient tab--Claims
- Claims tab

New right-click menu option

You can view the color-coding legend on the Patient name column using a new option on the right-click menu: Show Patient Flag.Legend.

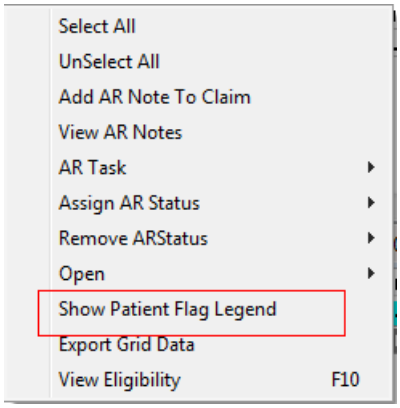

Figure 15. Right-click menu

New Claim color-coding

The color-coding for incomplete charges will now appear on all tabs when viewing patient balances and on the Claims tab of AR Tracker when viewing insurance balances when Use Color-Coding for Transactions is selected in Program Option.

Right-click menu new option

You can view the color coding legend using a new option on the right-click menu that is available when you right-click on an item in the lower grid:

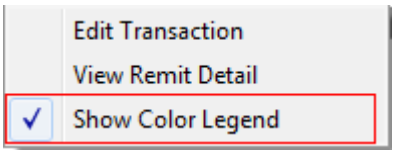

Figure 16. Right-click menu

When you select the option, the color-coding legend set up in Program Options will appear.

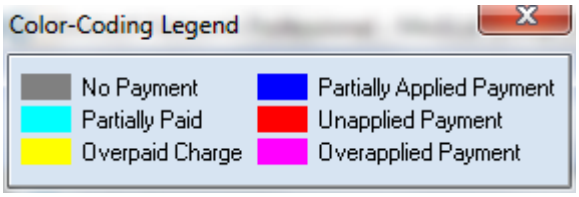

Figure 17. Color-coding legend

You will see line items in the lower gird highlighted based on the transaction color-coding set up on the Color Coding tab of Program Options in Medisoft.

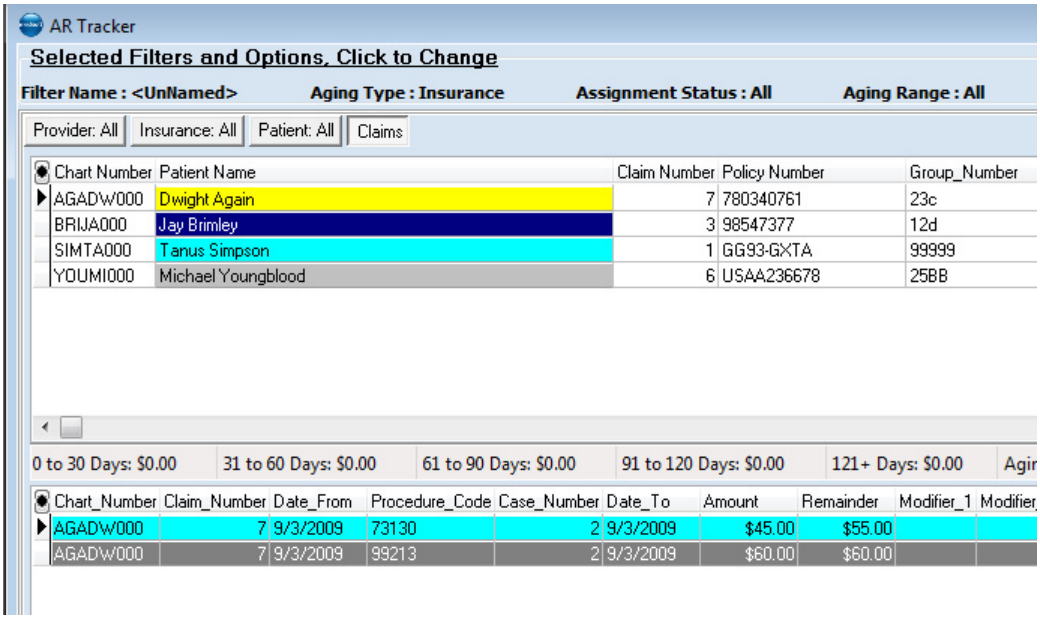

Figure 18. AR Tracker screen

Duplicate Patient Checking

Updated Patient Entry and Quick Entry

Medisoft will now perform checking for duplicate patients on Patient Entry and Quick Entry using the following criteria:

- Last Name and Date of Birth

Previously, checking was performed only on the Social Security number entered. Now, Medisoft will check for duplicate Last Name + Date of Birth.

Note: for Patient Quick Entry, checking will take place when you save the patient record. For patient entry, you will receive the message when you tab off the field.

If there is a duplicate, you will see a warning:

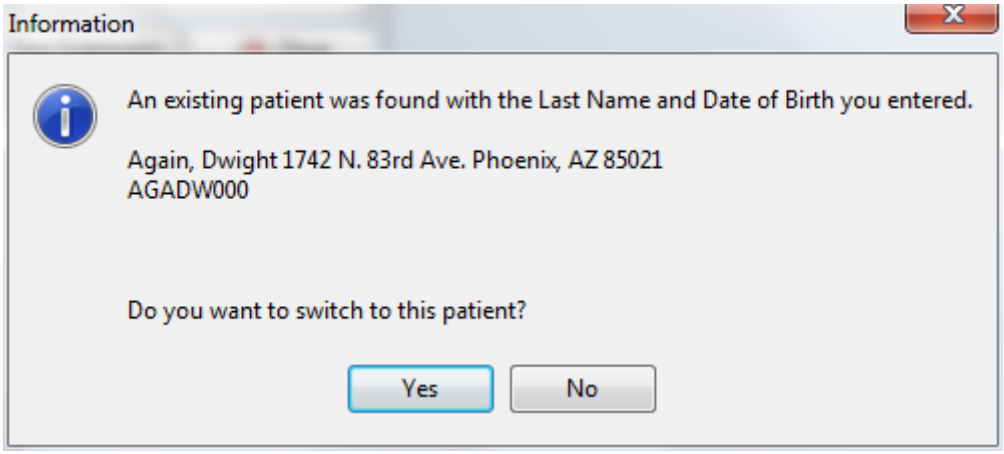

Figure 19. Duplicate Patient Warning popup

This warning will include the patient name and address. In Patient entry,

- If you click No, the message with close and allow you to save the patient.
- If you click Yes, the message will close and display the existing patient record

In Patient Quick Entry,

- if you click No, you will remain on the filled in Patient Quick Entry screen but the patient will not yet be added
- If you click Yes, the message will close and you will remain on the filled in Patient Quick Entry screen and the patient/case will be added

If there are multiple duplicates, you will see the following screen:

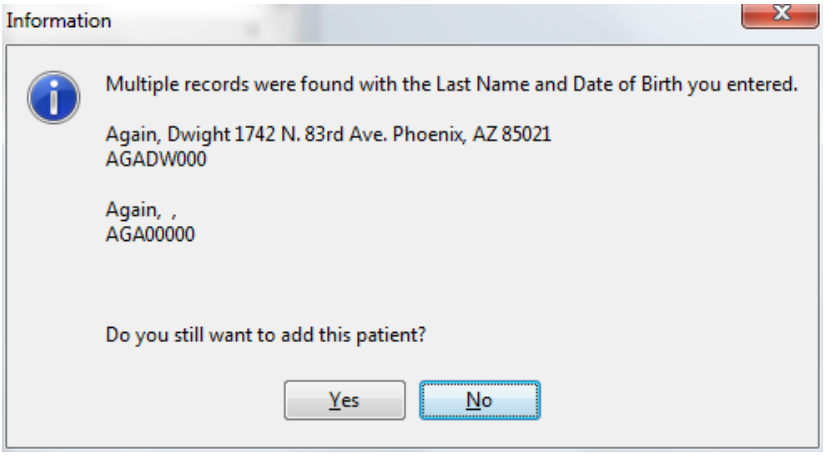

Figure 20. Duplicate Patient warning - multiple duplicates

- If you click No, the message with close and return you to the Patient List screen
- If you click Yes, the message will close and allow you to complete entering data for the new patient

If Social Security number, Date of Birth and Last Name ALL match another record, you will see the message for duplicate Social Security number.

Note: if all of the digits are the same for the Social Security number, a check for duplicates is NOT performed. This applies to Patient Quick Entry only.

Updated Pending Patient Entry

In addition, there is now duplicate patient checking for pending patients. First, there is a check for duplicate Social Security number, and then there is a check for duplicate Last Name and Date of Birth. If there is a Last Name and Date of Birth, the following warning message appears:

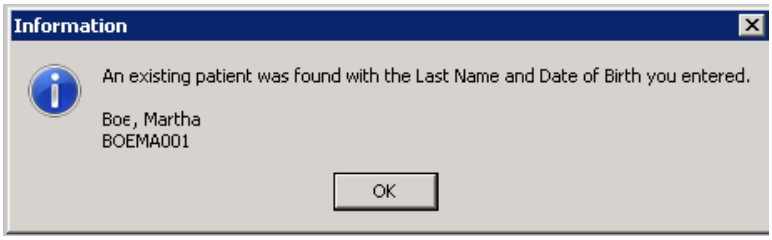

Figure 21. Duplicate Warning message

If there are multiple duplicates, the following message appears.

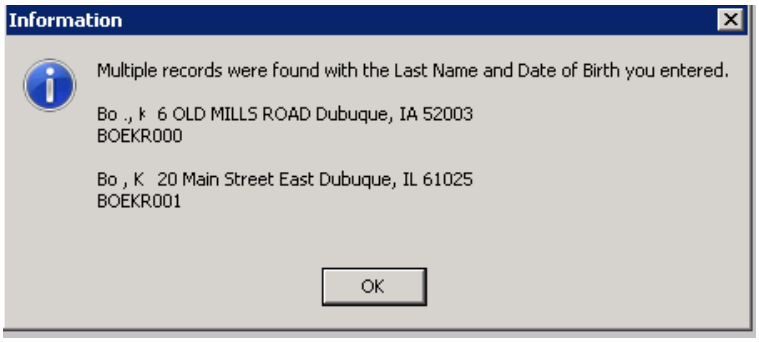

Figure 22. Duplicate Warning message

Practices will need to decide their work flow when the patient already exists in Medisoft. If the patient filled out Medical History or a Form on a mobile device, you may wish to add the duplicate person anyway. In that way, you can print the Patient Intake information (printing this intake info is only available on the Patient List) Once the information is printed, you can remove the duplicate patient and case.

BillFlash

Several updates have been made that allow you to:

- Send cash payments from patients to BillFlash so that their accounts at BillFlash coincide with their accounts in Medisoft.
- Edit any field in the Payment area of the screen (other than Payor Type) for BillFlash payments so the payment can be posted correctly

Updated Deposit screen

The OfficePay button is now enabled when you select Cash as a Payment Method. This allows you to send the cash payment to BillFlash so that the patient/guarantor's account at BillFlash is up to date and balanced. In addition, the patient name is now sent to BillFlash.

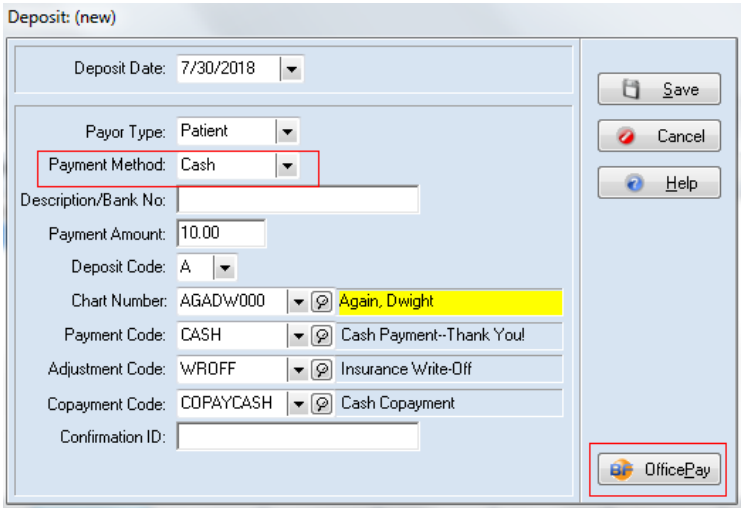

Figure 23. Deposit (new) screen

Updated Transaction Entry screen

The OfficePay button is now enabled when you select a code with a Type of Cash payment as a Pay/Adj Code. This allows you to send the cash payment to BillFlash so that the patient/guarantor's account at BillFlash is up to date and balanced. In addition, the patient name is now sent to BillFlash as well.

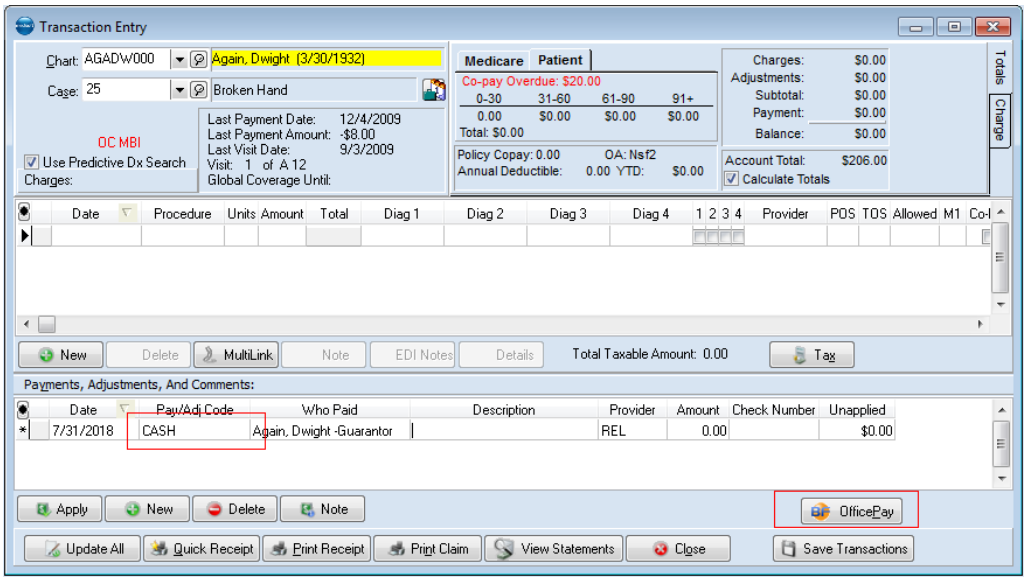

Figure 24. Transaction Entry screen

In addition, you can now edit any field in the Payment area of the screen for BillFlash payments.

Revenue Management

Updated Process Remittance screen

The Process Remittance has been updated to improve the workflow for identifying secondary claim processing as follows:

New column

There is a new column: Next Payer that shows you the next payer if the patient has more than one insurance.It will also show the filing method (EDI or paper) for the next payer.

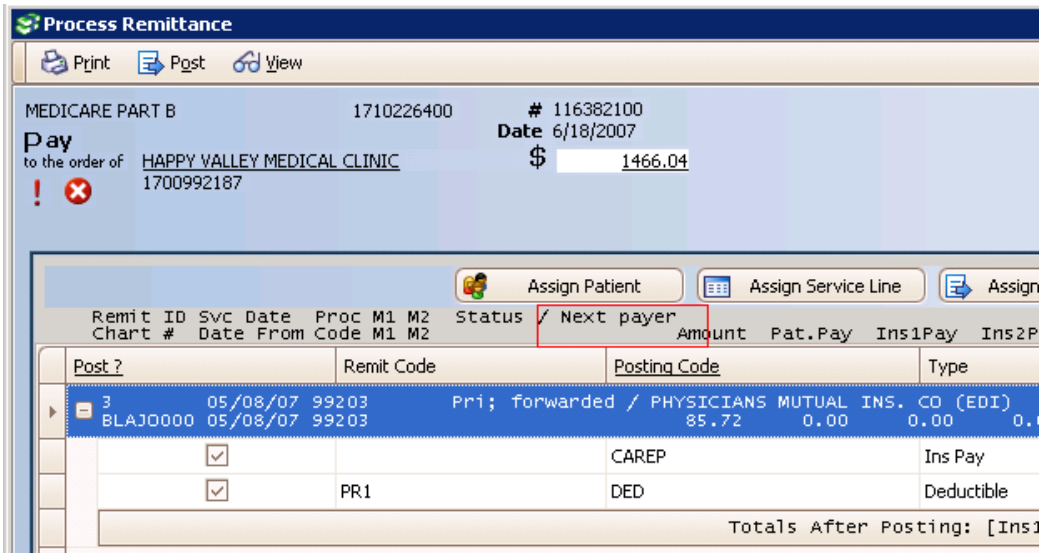

Figure 25. Process Remittance screen

New Column

There is a new column on the Process Remittance screen: Status. In this column, you can see an abbreviated notation of the status of the remittance.

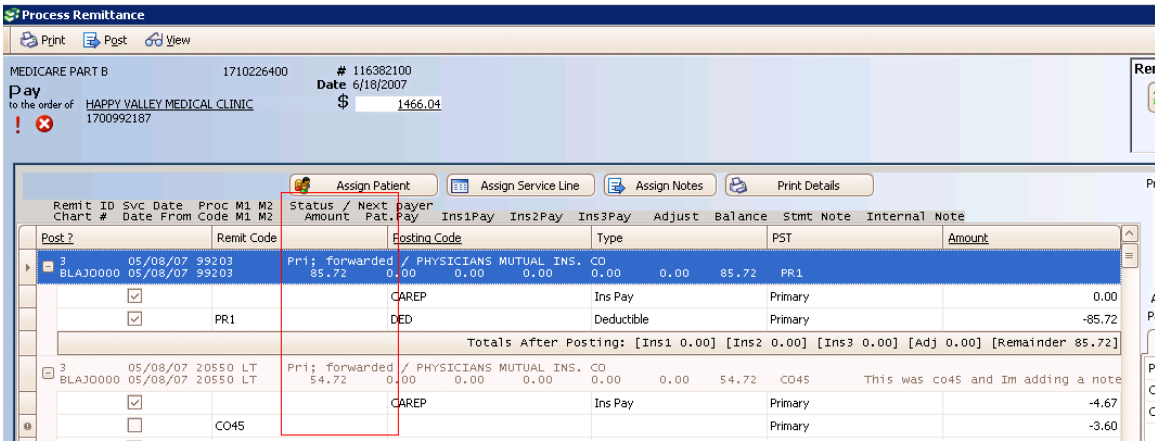

Figure 26. Process Remittance screen

The table below shows the possible values shown in the column.

Status	Abbr displayed	Description on right
1	Primary	Processed as Primary
2	Secondary	Processed as Secondary
3	Tertiary	Processed as Tertiary
4	Denied	Denied

19	Pri; forwarded	Processed as Primary, Forwarded to additional payer(s)
20	Sec; forwarded	Processed as Secondary Forwarded to additional payer(s)
21	Ter; forwarded	Processed as Tertiary Forwarded to additional payer(s)
22	Reversal	Reversal of Previous Payment
23	Not our claim; forwarded	Not Our Claim, Forwarded to Additional Payer(s)
25	Predetermination Pricing Only	Predetermination Pricing Only - No Payment

Chapter 2 - Resolved Issues

The following issues were resolved with Medisoft Release 23.

PBI	Application	Description
196901	Revenue Management Reports	The Report Viewer will no longer hang because Revenue Management was creating very long file names for TriZetto remits. TriZetto remits are now handled like other clearinghouse reports and are renamed only once and given a date stamp. Steps to recreate 1. Launch Revenue Management and select Reports. 2. Click Get Reports to get remits from TriZetto. 3. Verify that the remits appear and Revenue Management does not “hang.”
197566	Revenue Management	Revenue Management has been updated so the claims editor will no longer always checks diagnosis codes using the value stored in the ICD-9 field. Steps to recreate 1. Select a patient whose insurance company has a default diagnosis code set up for ICD-10. 2. Enter a transaction and create a service line with at least one or more diagnosis codes on the service line. Be sure to use codes that have an ICD-10 value entered in the CODE field. Additionally, make sure the ICD-9 field contains the legitimate ICD-9 code. 3. Save the transaction. 4. Create a claim that includes this transaction. 5. Launch Revenue Management and view the claim. 6. Verify that there is no error regarding the ICD-10 code(s).
198144	Revenue Management	Communication Sessions for TriZetto claims and eligibility are now automatically added for practices that have used Revenue Management in the past. Steps to recreate 1. In Medisoft, Launch Revenue Management. 2. On the Configure menu, select Communications. 3. Verify that the TRICL and TRIEV sessions appear in the grid.

198472	AR Tracker	AR Tracker will now round numbers on the New Aging fields and Unbilled column. Steps to recreate 1. In Medisoft, launch AR Tracker. 2. Set filters to that the aging columns and Unbilled column appear. 3. Run the filter and verify that the numbers are being rounded properly and that no invalid amounts appear.
198476	AR Tracker	Medisoft will now filter patients correctly when Total Amount Due fields are used. Steps to recreate 1. In Medisoft, select Activities and then AR Tracker. 2. In the filters change the Aging Type to Patient. 3. In the Total Amount Due change it to $0.00 to $50.00. 4. Click the Apply button. 5. Verify that only patients with a balance between $0.00 and $50.00 appear in the results.
198493	AR Tracker	AR Tracker will now show correct totals for a 121+ days column. Steps to recreate 1. Run AR Tracker, filtered to show balances that will appear in the 121+ days column. 2. Verify that the total at the bottom of AR Tracker for the 121+ days column is correct.
198958	Mediutils	You will no longer receive errors when you run Repair Payment Reference when the Who Paid field is blank in certain Medisoft data tables. Steps to recreate 1. Launch Mediutils and select a practice. 2. Select Repair Payment Preferences. 3. Click **OK**. 4. Back up your data. 5. Click **Start** and verify there are no errors.

198615	Mediutils	When performing a Global Conversion in Mediutils, Mediutils will no longer skip the second practice if the user is logged into the second practice. Steps to recreate 1. Launch Mediutils and log in to the second practice in the list. 2. Double-click Global Convert. 3. Click the Select Data button. 4. Click the Select All button to highlight all practices in the list. 5. Click OK and click Start. 6. Verify that all practices are converted.
199530	AR Tracker	AR Tracker will now open the correct case for a patient from the right-click menu. As part of this update, the Open Case option has been moved from the top grid in AR Tracker to the bottom grid where the claim is associated with a particular case. Steps to recreate 1. Open AR Tracker and select filters for Insurance Aging Type. 2. Click the Claims tab. 3. In the lower grid, right click and select Open Case. 4. Verify that the correct case opens.