



# **Medisoft Mobile 3.3**

---

## Release Notes

April 2021

**CGM MEDISOFT**

---

Practice Management and EHR

## **Copyright notice**

Copyright © 2021 eMDs, a brand of CompuGroup Medical. All Rights Reserved

Use of this documentation and related software is governed by a license agreement and this document is incorporated into and is made part of the license agreement. This documentation and related software contain confidential, proprietary, and trade secret information of eMDs, a brand of CompuGroup Medical, and is protected under United States and international copyright and other intellectual property laws. Use, disclosure, reproduction, modification, distribution, or storage in a retrieval system in any form or by any means is prohibited without the prior express written permission of eMDs, a brand of CompuGroup Medical. This documentation and related software are subject to change without notice.

## **Publication date**

April 2021

## **Product**

CGM Medisoft®

## **Corporate address**

eMDs, a brand of CompuGroup Medical  
10901 Stonelake Blvd.  
Austin, Texas 78759  
512-257-5200

# Table of contents

<b>Chapter 1 - Medisoft Enhancements</b> .....	<b>1</b>
Installation and configuration .....	2
Settings .....	2
Eligibility Display .....	4
Patient Card .....	5
Charges .....	8



# Chapter 1 - Medisoft Enhancements

This chapter presents installation and configuration for the Medisoft® Mobile 3.3 application, as well as a high-level description of the enhancements for 3.3.

## Supported devices

---

These features are for Medisoft 25 and newer.

---

### Android

The following Android devices are supported:

- Android Tablet with Display dimensions of 9.5 inches or greater
- minimum of 1280 x 800 resolution

The following operating systems are supported:

7.x and newer

### Apple

#### iPad

---

The Patient Intake feature is supported on iPad's with display dimensions of 9.5 inches or greater. Android Tablet's with Display dimensions of 10 inches or greater.

---

- iOS 12 and newer

#### iPhone

- iOS12 and newer

## Firewall Considerations

For mobile 3.x apps, the Medisoft server and the mobile devices must be able to connect outbound to [mslconnect.emds.com](https://mslconnect.emds.com) (23.99.212.20) on TCP port 443 (HTTPS). No inbound connections are made to the Medisoft server.

You can test connectivity by entering the following URL in a web browser running on your server:  
<https://mslconnect.emds.com/connectiontest>

If you see a message "You have successfully connected to MSLConnect," then your server meets the connectivity requirements for the mobile app.

## Other Considerations

- You may wish to turn OFF auto-correct spelling if it is on your device. This will prevent unwanted changes as names and other words are entered.
- You may wish to turn OFF Smart Punctuation if it is on your device. This will prevent periods and other punctuation from automatically being applied to data entry.

- You may also wish to turn ON "Guided Access" in the iPad settings to keep the iPad in a single app. You can then triple-click the Home button to lock-in the app you wish to use so patients cannot roam around your device.
- You should require a password to operate your iPad or iPhone and turn-on "Find my iPad" or "Find my iPhone".
- Medisoft Mobile does not support split screen.

## Installation and configuration

---

The mobile service for 3.3 requires .NET 4.5.2 or newer. If it is not already installed on your server, it will be installed with 3.3.

---

1. Start Medisoft or on your desktop and open your practice.
  2. Set up users and user security for each user.
  3. On the Tools menu, select Services > Mobile Interface Configuration. The Mobile Configuration screen appears.
  4. Click the **Enable** button.
  5. Take note of the values for API Key and API Code.
  6. With your mobile device, launch the Google Play or App Store.
  7. Search for Medisoft.
  8. Download and install the application.
  9. On the mobile device desktop, tap the mobile application. The application starts.
  10. Enter the API Key and API Code that you noted.
  11. Tap Save. The application will connect to your practice data.
  12. Log in to your practice using your User ID and Password.
- 

If you do not have a mobile PIN entered in Medisoft core, you will be prompted to enter a mobile PIN.

---

## Settings

---

Note: Screen captures may appear differently depending on your mobile device (iPad, iPhone, or Android). Screen captures in this document show either iPad or iPhone.

---

## New option

There is a new option in Settings: Pull Diagnosis. If you select Yes for this option, Medisoft Mobile will pull diagnosis information from the Diagnosis tab in the patient case in Medisoft core and

diagnoses will be pre-checked on the Superbill template in Medisoft Mobile.

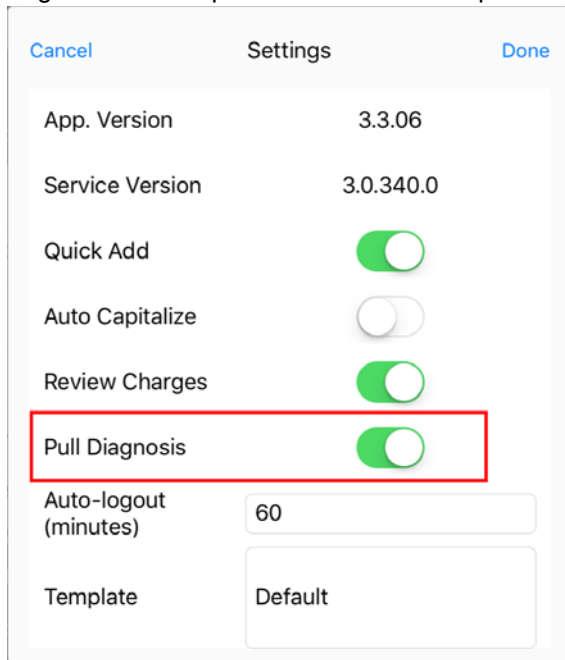


Figure 1. Settings screen

A new section 'Pulled Diagnoses' will be automatically added to the superbill with these codes when you add charges.

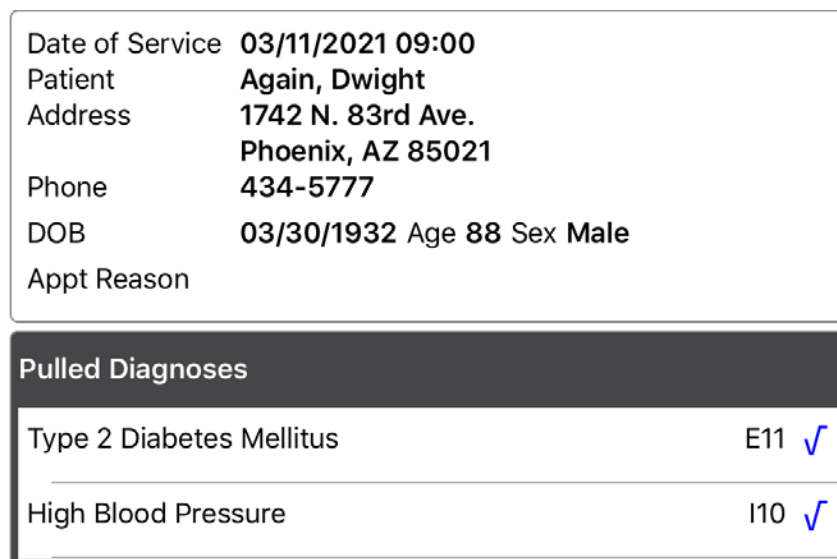


Figure 2. Superbill - Pulled Diagnoses section

Note: these same diagnoses are already listed on the patient card.



**Dwight Again**  
Age 88

**Mar 11 - 9:00 AM (15 Min)** ^  
9:00 AM - 9:15 AM

---

Appointment Re...	Appointment St...	Resource
	Unconfirmed	
<b>Provider</b>	<b>Referring Provider</b>	
Mallard, J.D.	Hawkeye Pierce	

---

**Notes**

Save Note

---

Date of Birth	Address	Home Phone
3/30/1932	1742 N. 83rd Ave.	434-5777
<b>Gender</b>	Phoenix, AZ	<b>Mobile</b>
Male	85021	

---

Case Number	Case Description	
17	Back Pain	
<b>Primary Ins</b>	<b>Policy Number/ MBI</b>	<b>Copay</b>
MED01	0101010101	\$20.00
<b>Secondary Ins</b>	<b>Policy Number/ MBI</b>	<b>Guarantor Balan...</b>
AET00		\$0.00
<b>Tertiary Ins</b>	<b>Policy Number/ MBI</b>	


---

Diagnosis	
1	E11 Type 2 Diabetes Mellitus
2	I10 High Blood Pressure




Figure 3. Patient Card

## Eligibility Display

There are new icons for eligibility status on the Home page patient appointment list. The following table shows you the eligibility icons for the mobile app.

Icon	Description
	None/Verification not attempted



Icon	Description
	Unknown
	Inactive
	Active

On the Home screen, they appear to the left of the appointment time.



Figure 4. Appointment section of Home page

## Patient Card

### New Note Editing

You can now edit a note on the Patient Card and it will automatically update the appointment note. To do so, tap in the Notes area on the Patient Card. Use the keypad to type in the note. Then, tap

the **Save Note** button. The maximum length of the note is 255 characters.

Andrew Austin      Feb 12 - 9:15 AM (15 Min) ⌵  
 Age 71      9:15 AM - 9:30 AM  
**Appointment Re...**    **Appointment St...**    **Resource**  
 Existing Patient      Unconfirmed  
**Provider**      **Referring Provider**  
 Mallard, J.D.

---

**Notes** Save Note  
 Patient has seen Dr. Brown

Figure 5. Patient Card - Notes section

If the appointment is a repeating appointment, you will not be able to edit the note here; and the Save Note button will be disabled.

### Additional information on notes

- You must save the note prior to moving to another patient. Otherwise, you will lose the note.
- Due to the multiple variations in Android and Ipad tablets, as well as different fonts and resolutions, you may notice some differences in the display of the Notes text.

#### Android tablets

A very long note may not display the start of the note, so eMDs recommends that you use the scroll ability to make sure you are seeing all the text and not missing anything at the top. Depending on your tablet you may also notice that when scrolling it may be easy to unintentionally enter 'edit mode'.

#### iPad

Long notes on a patient record may maintain the previous scrolled position when you leave a patient record, view another patient record, and then return to the first patient record.

Navigating to second patient record while in Edit mode in the first patient record (with the keyboard displayed) may put the second patient record in Edit mode automatically.

If you use landscape mode on an iPad you may notice the Appointment Note section may be partially obscured by the iPad keyboard as it appears on the screen. To minimize this, disable Auto-Correction, Shortcuts, and/or Predictive as keyboard options. In addition, you may need to change these settings separately to see which provides optimal viewing of the screen.

### Note editing with iPhone

To add or edit a note using iPhone, follow these steps:

1. Open the patient's record on the Home screen.

- Expand the patient's details.

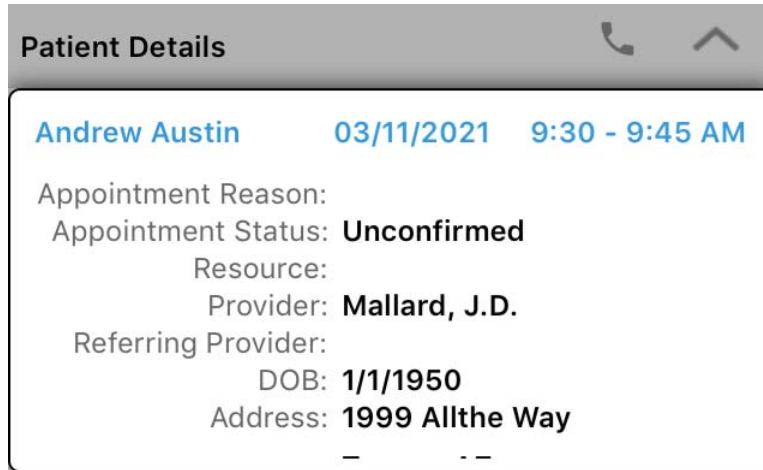


Figure 6. Patient Details

- Scroll to the Notes section.

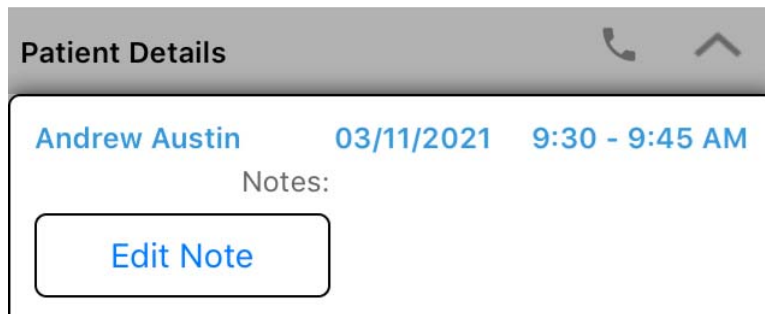


Figure 7. Patient Details - Notes section

- Tap the Edit Note button on the patient's details. The Edit Note screen opens.

5. Type in the note on the Edit Note screen.

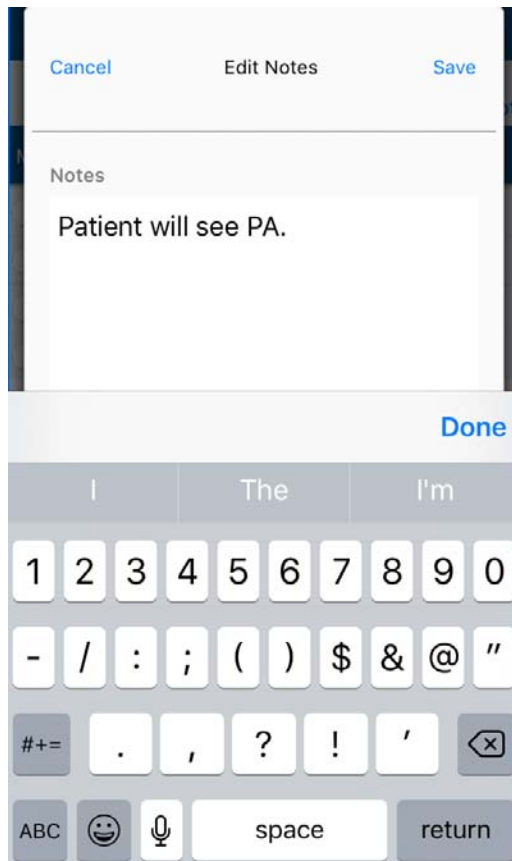


Figure 8. Edit Note screen

6. Tap Save. The note appears on the Home screen.

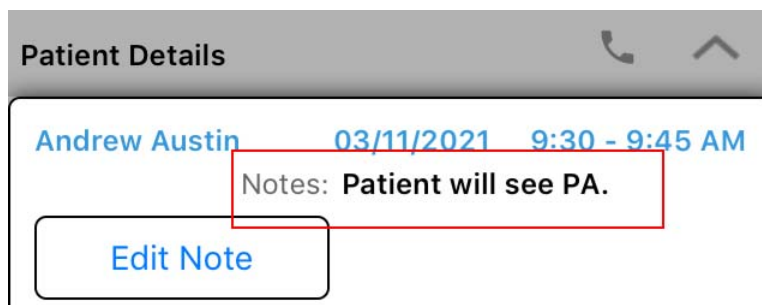


Figure 9. Home screen - Patient Details

## Charges

Updates have been made to the charges so that you can select and use a timer for E & M Time billing. In addition, you can now also add a Multilink to Charges.

## Adding Sections in Charges

To use these new features in Add charges, you must enable “Allow edit during charge entry” on the Superbill. To activate this option:

1. On the Home screen, tap the Settings Gear. The Superbill opens.
2. Select the Superbill template you want to modify.
3. Select the Edit icon on a section header.
4. Tap Edit Section.
5. Enable Allow edit during charge entry.
6. Tap Done.
7. Tap Save on the Superbill Template screen

## New Field Type

When you tap the + on a section in Add charges, there is a new Field Type that you can select to add the Evaluation and Management (E/M) Timer section to a superbill: Evaluation and Management (E/M) Timer.

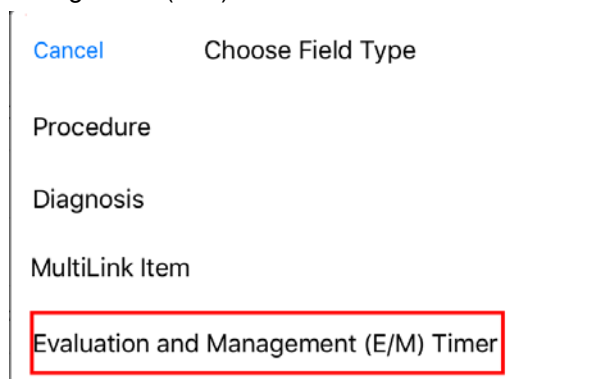


Figure 10. Choose Field Type screen

When you select this option, the timer will be added to the Superbill when adding Charges and the timer will start and will be checked.



Figure 11. Timer Section

To stop the timer, tap the section. Tap again if you wish to restart the timer. If you are selecting a CPT code based solely on time, use the time to select the appropriate code.

**Note:** Beginning with CPT 2021 and except for 99211, time alone may be used to select the appropriate code level for the office or other outpatient E/M services codes (99202, 99203, 99204, 99205, 99212, 99213, 99214, 99215). Different categories of services use time differently. It is important to review the instructions for each category.

The time will be transferred as a note from the Mobile device to Unprocessed Transactions so there is a historical notation for the biller's review or later questions.

### Workflow Recommendation

When you are creating charges, be sure to add the timer BEFORE you select or add diagnoses or procedures. Adding the time after you select diagnoses or procedures will clear the selected diagnoses and procedures since the screen needs to refresh.

### New Field type

When you tap the + on a section in Add charges, there is a new option: MultiLink Item.

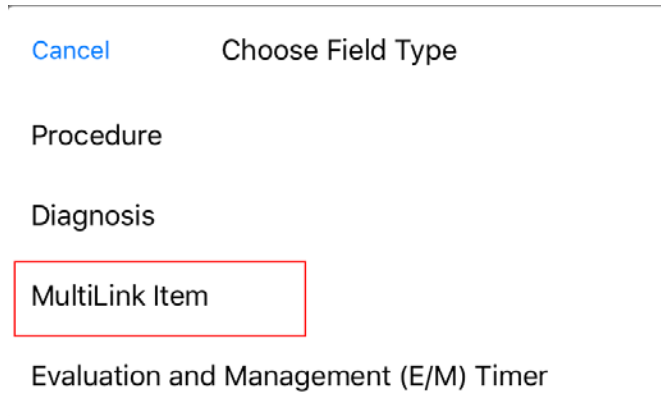


Figure 12. Choose Field Type screen

When you select this option, the Search MultiLink Items screen opens. Use this screen to search for and select a MultiLink item.

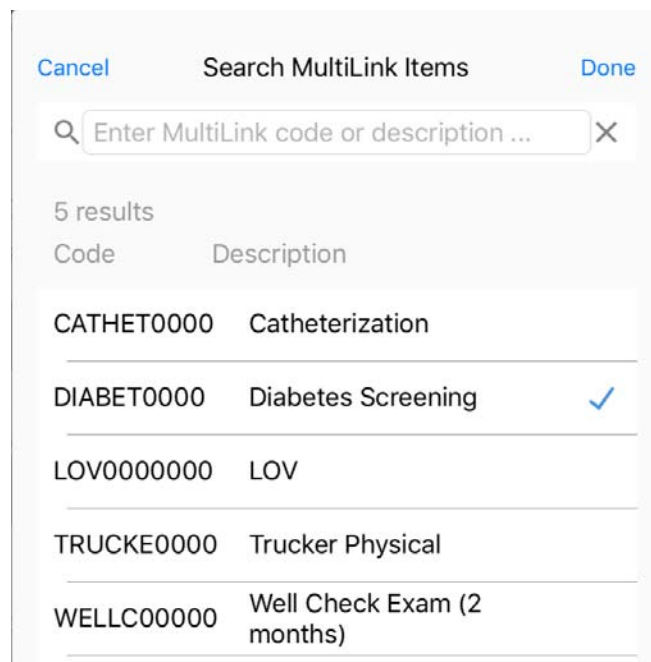


Figure 13. Search Linked MultiLink Items screen

Once you select a multilink item and tap Done, the new section will appear at the top of the superbill; The Section header will be the name of your Multilink from core. All of the transactions from that Multilink item will display and be selected.

Back Default ▼ Clear Submit

Date of Service <b>02/12/2021 09:15</b>	Insurance <b>Aetna</b>
Patient <b>Austin, Andrew</b>	Copay <b>\$0.00</b>
Address <b>1999 Allthe Way Tempe, AZ 85123</b>	Guarantor Balance <b>\$0.00</b>
Phone <b>767-2222</b>	Referring Provider <b>Mallard, J.D.</b>
DOB <b>01/01/1950 Age 71 Sex Male</b>	Facility
Appt Reason <b>Existing Patient</b>	Case <b>6 - Annual Exam</b>

Diabetes Screening	
Office Visit Est. Patient DDM	99214 ✓
Blood Sugar Lab Test	82947 ✓
Lab Drawing Fee	36215 ✓
Handling Fee	99000 ✓

Pulled Diagnoses	
Exam Routine Health (Adult)	V700 ✓

Office Visit (Est)	
Minimal	99211
Expanded problem focused	99212

Figure 14. MultiLink item section

Notes

- If the Units or Modifiers are specified in Medisoft core for the procedures used in the Multilink, they will be used in Medisoft Mobile just as if they had been on the superbill not in the MultiLink section and will show on the Review Charges page.

