Lytec 2021 Release Notes

March 2021

eMDs lytec

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Lytec 2021

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Chapter 1 - Enhancements

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

Important: you must have an account set up in eMDs Salesforce and your account must include an “asset code” or “subscription code” for the following features before you can use them: Acuant OCR Card Scanning and IMO - Enhanced Code Search. Verify with your Value-Added Reseller (VAR) that you have an account and that it has your assets and/or subscriptions for these features listed. VARs should contact their VSE for more information.

The list of registered products in Lytec will not list Acuant - OCR Card Scanning nor IMO - Enhanced ICD Search since these are registered in Salesforce. You must look at your account in Salesforce to see if these features are registered.

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Product Registration/Activation

Updated Account Registration screen

There is a new screen that you will use to activate Lytec: Account Registration. Enter the information on this screen that you received from your VAR (Value-Added Reseller). Once this is done, you can use Lytec.

Figure 1. Account Registration screen

Note: Lytec requires an Internet connection to work properly. However, if you lose your Internet connection, you will be able to use Lytec for up to 24 hours without your Internet connection. After this 24 hours, you will receive an error message when you try to log into/use Lytec.

Recommendation

It is recommended that, after entering your Customer Account ID and successfully registering your software, you make a backup of Lytec SharedData and store it safely offsite. In this way, in case your server fails or you have to set up a new server, you can restore from that backup. Registration of Lytec 2021 is tied to the server, so if you do not have your Lytec SharedData backed up, you will

need to contact your VSE or Support to get your registration reactivated. Perform this one-time backup in addition to the daily practice files backup, which should be performed and stored offsite.

To back up your SharedData

1. Close any open practices in Lytec.
2. Click the L in the top left corner of the Lytec screen.
3. Click Backup and Restore Database.

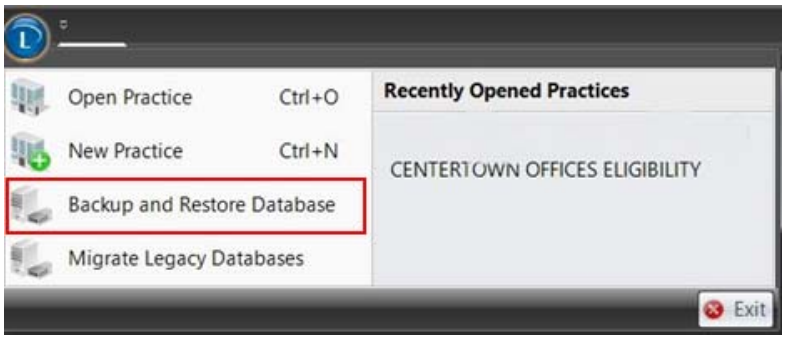


Figure 2. Lytec screen

The Confirm SQL SysAdmin screen opens.

Figure 3. Confirm SQL SysAdmin screen

4. Enter your credentials and click the **OK** button. The Manage Backups screen opens.

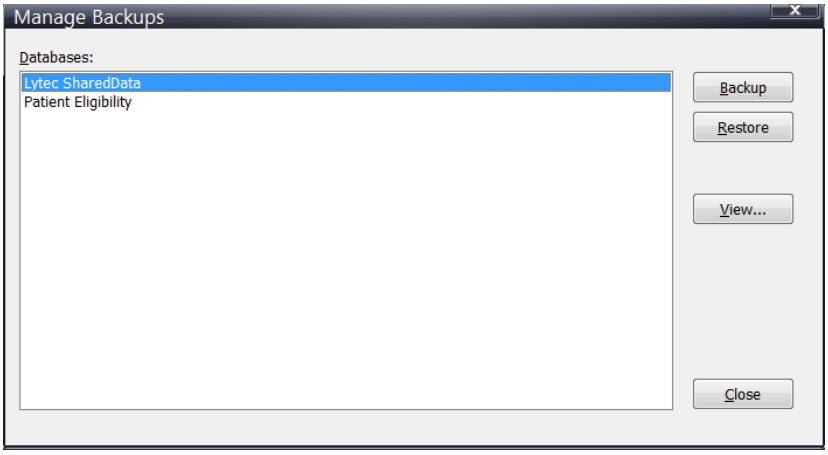


Figure 4. Manage Backups screen

5. Select Lytec SharedData and click the **Backup** button.
6. Follow the remaining prompts to create the backup.

Installation Option removed

The option to install a demonstration version of Lytec has been removed. Since Lytec 2021 is licensed through a Salesforce account, installing a demonstration copy of the software is no longer an option using a serial number. Your Value Added Reseller can remotely demonstrate the Lytec software if there are questions related to features and functionality.

SQL 2017

SQL Server (Express) 2017 is available for Lytec 2021 Single-User, Multi-User, and Professional versions. For new installs, it will be installed automatically with Lytec 2021; for upgrades, Lytec 2021 will continue to use the existing version of SQL but you can install SQL Server 2017.

Preferences

Updated Image Formats tab

Due to the limitation in the size of the database for a practice using Lytec Single User, Multi-User, and Professional User (10GB), a new feature has been implemented that allows you to store patient images outside of the Lytec database: Filestream.

Setting up this feature is a two-step process:

1. Enable Filestream in SQL Server Configuration Manager (see “Enable Filestream in SQL Server Configuration Manager” on page 5 [just below])

   OR

   if you do not have SQL Server Configuration Manager, you can enable Filestream using Computer Management (see “Enable Filestream using Computer Management” on page 7)

2. Enable the feature in Lytec Preferences (see “New button” on page 9)

Enable Filestream in SQL Server Configuration Manager

Before you can use this feature, you must enable it in the SQL Server instance that you are using for Lytec. To do so, follow these steps:

Prior to performing these steps, be sure that all users are logged out of Lytec!

1. Launch Sql Server Configuration Manager (In Windows 10, you can type SQL into the Search box and the app will appear in the list.)

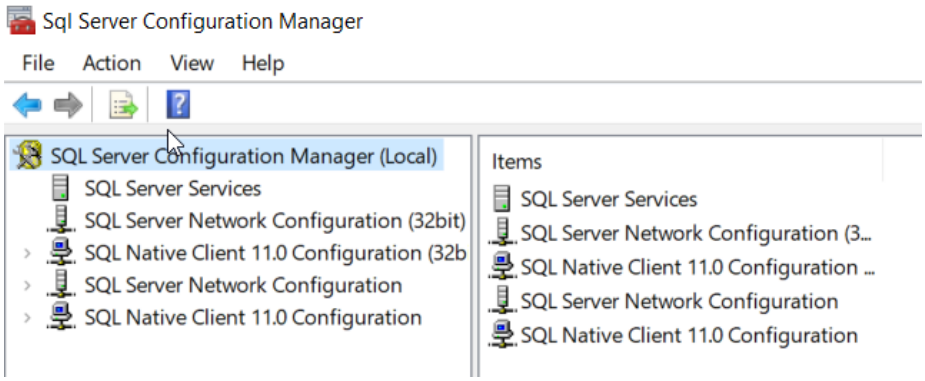


Figure 5. Sql Server Configuration Manager

2. Click SQL Server Services.

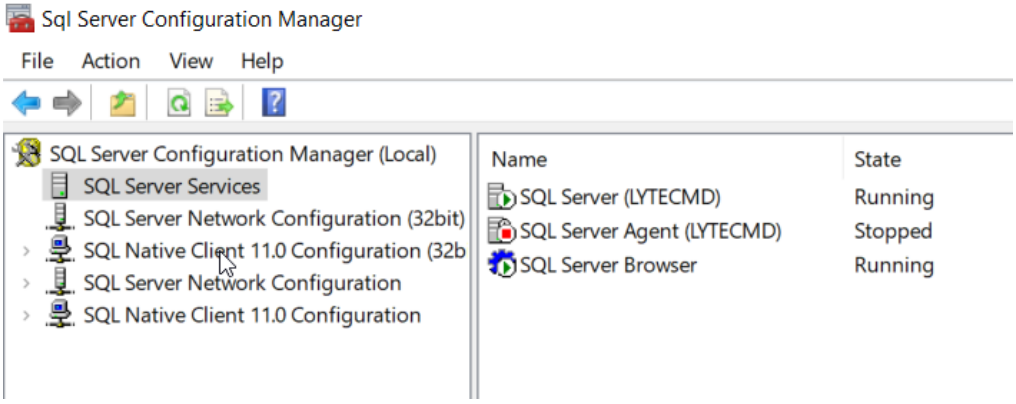


Figure 6. Sql Server Configuration Manager

3. Double-click the SQL Server instance on the right.

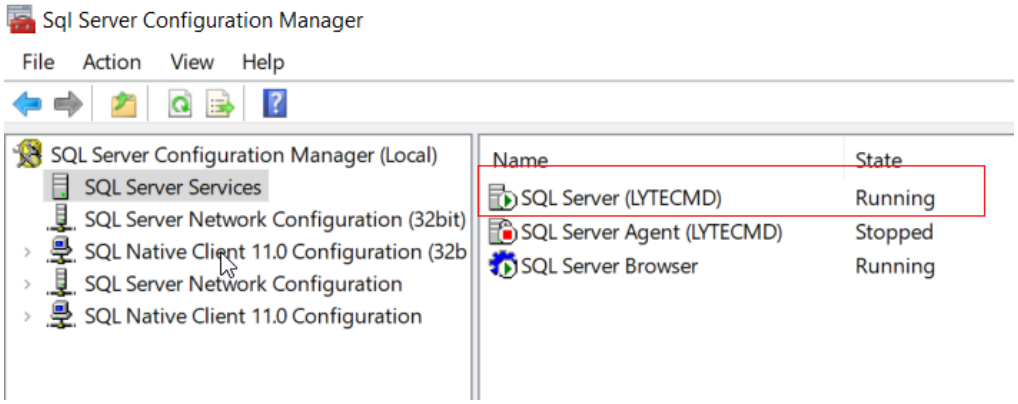


Figure 7. Sql Server Configuration Manager

4. Select the FILESTREAM tab.

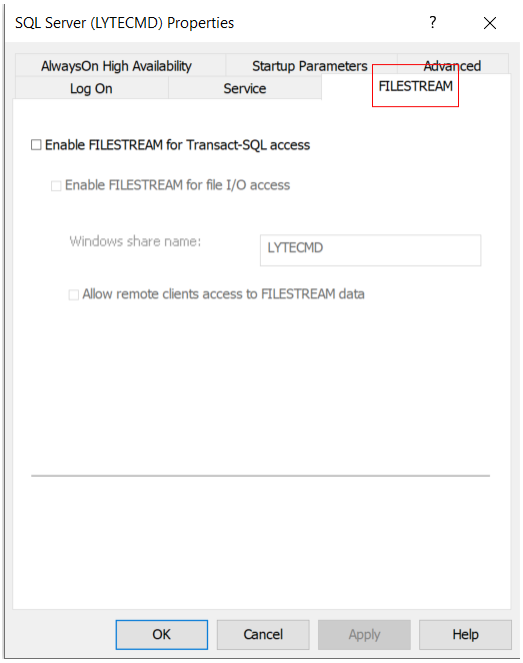


Figure 8. SQL Server Properties - FILESTREAM tab

5. Select the Enable FILESTREAM for Transact-SQL access check box and click the **Apply** button.
6. Select the Log On tab.
7. Click the **Restart** button to restart the service.
8. Click the **OK** button to close the screen.

Enable Filestream using Computer Management

1. Type compmgmt.msc in the Windows Search field and press the ENTER key. Computer Management opens.

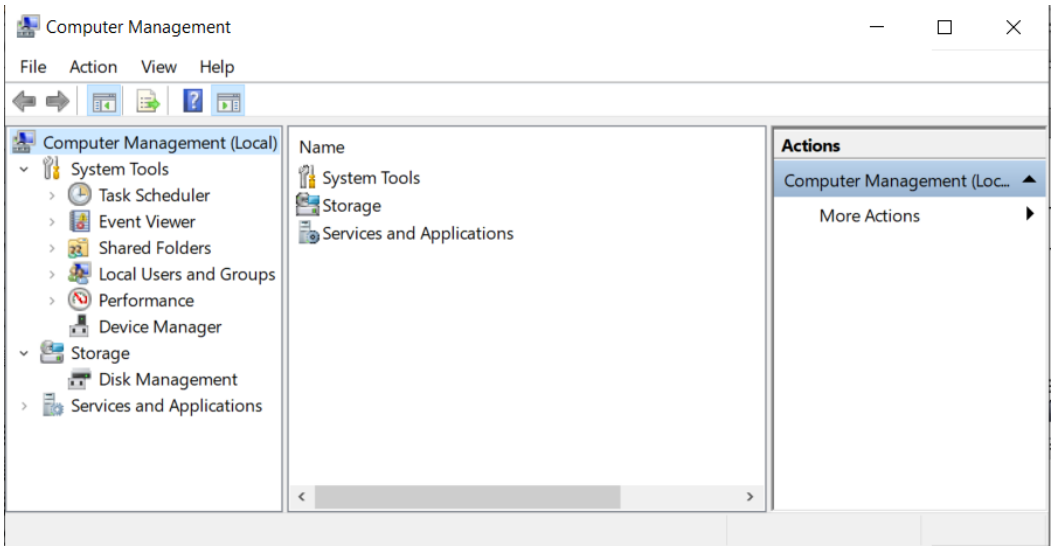


Figure 9. Computer Management

2. Expand Services and Applications in the left section of the screen.
3. Expand Server Configuration Manager.
4. Click Sql Server Services.

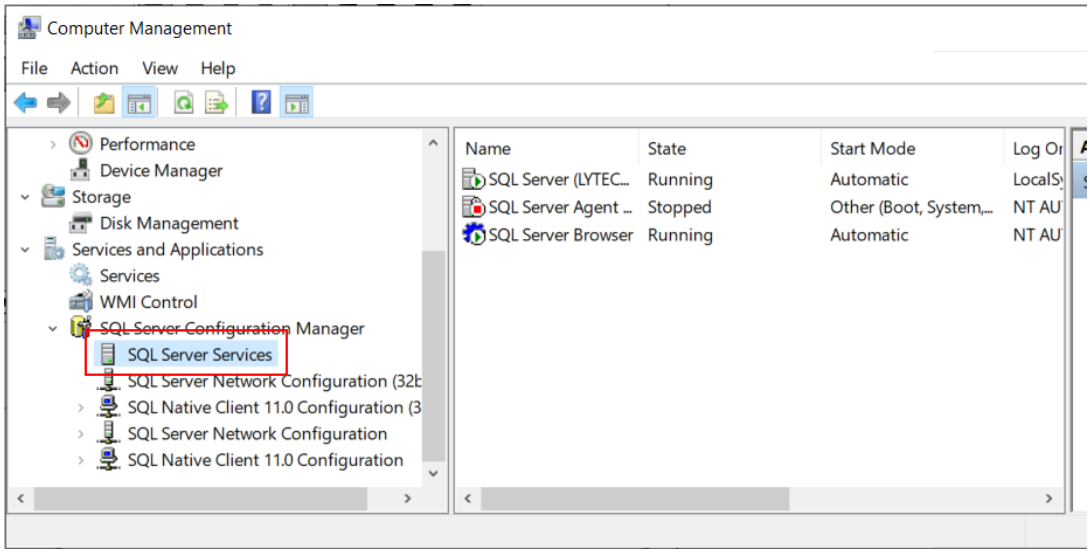


Figure 10. Computer Management screen

5. Double-click the SQL Server instance on the right.

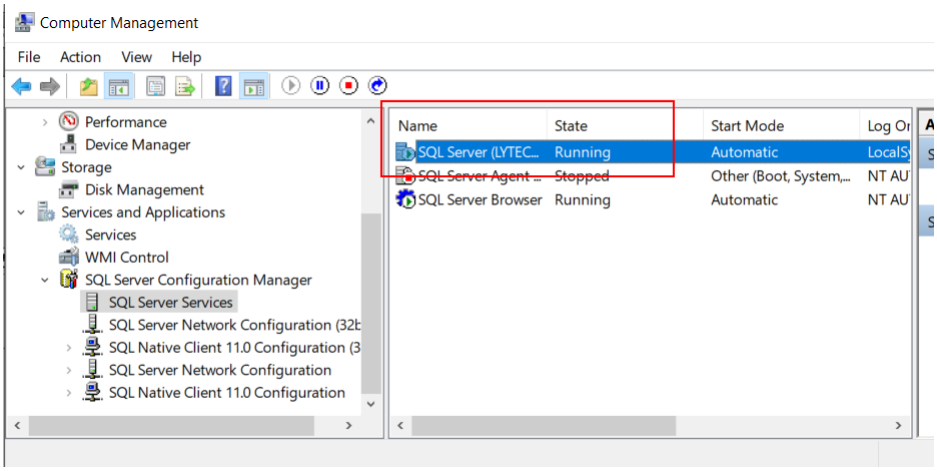


Figure 11. Computer Management

6. Select the FILESTREAM tab.

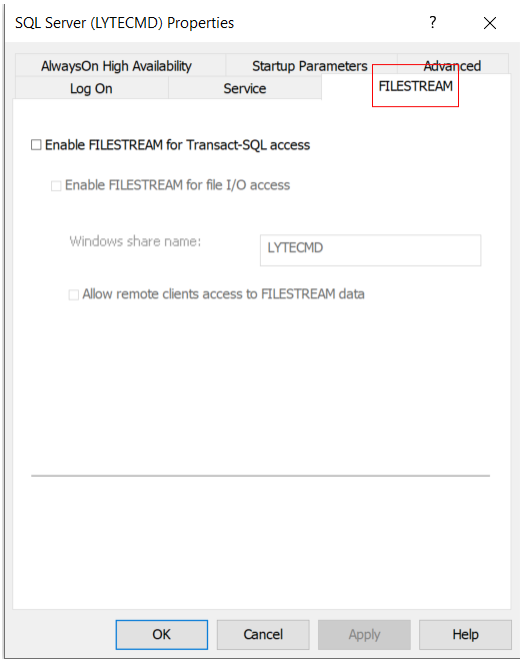


Figure 12. SQL Server Properties - FILESTREAM tab

7. Select the Enable FILESTREAM for Transact-SQL access check box and click the **Apply** button.
8. Select the Log On tab.
9. Click the **Restart** button to restart the service.
10. Click the **OK** button to close the screen.

New button

There is a new button on the Image Formats tab: Enable Filestream.

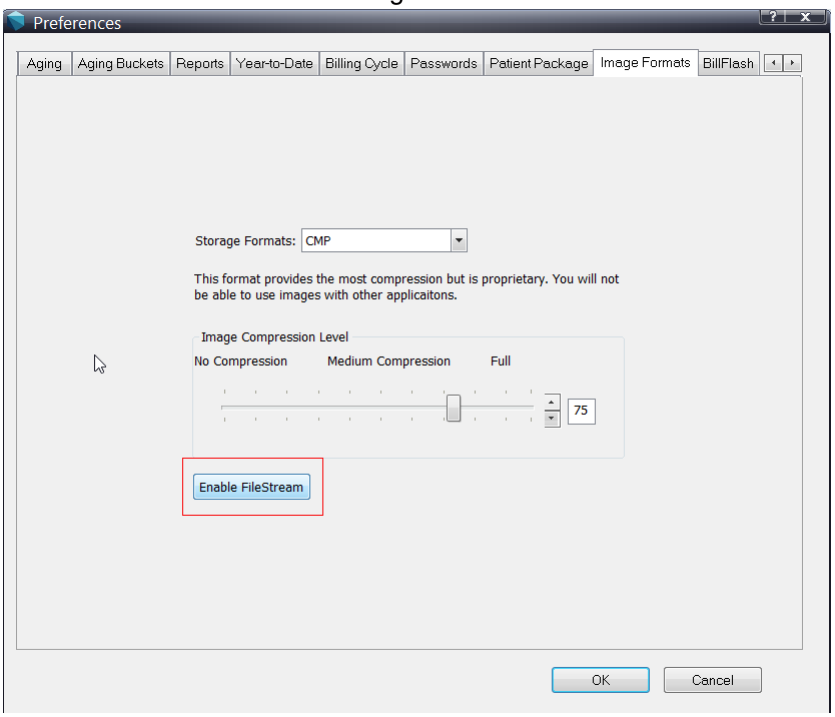


Figure 13. Preferences screen - Image Formats tab

To enable Filestream so that your images will be stored outside of the Lytec database, click Enable Filestream. Then, click OK.

Warning: Be sure to perform the steps above in the SQL Server Configuration Manager first! (see "Enable Filestream in SQL Server Configuration Manager" on page 5)

Your Lytec backups will continue to include the images that are now stored outside of the database.

Acuant – OCR Card Scanning

You can now scan patient insurance cards via OCR with Acuant, which will automatically populate the patient's insurance information in the Patient Demographics screen. OCR Scanning of patient insurance cards will improve productivity by:

- accurately capturing and auto-populating insurance data
- accelerate reimbursement cycles and reduce denials caused by incorrectly captured insurance data

This feature needs proper setup of the OCR scanning asset in the customer Salesforce account to send/process and return results. Your Value Added Reseller can set up the asset in Salesforce to validate your ability to utilize the OCR card-scanning service.

Please note there is a charge per OCR scan performed (both sides of an insurance card count as one (1) OCR scan). You will be billed for your OCR scanning usage through your Value Added Reseller.

Supported Scanners

- Brother DS Mobile 700D
- Brother MFC 8680DN

- 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

- Canon PIXMA MX 452

Recommendations

To perform the OCR data extraction there are certain recommendations that should be met by the user.

- OCR is supported by TWAIN-compliant scanners.
- Color images only
- When using a scanner to capture the images, capture cropped 300 dpi images of medical insurance cards.
- 300 or greater dpi image is required when capturing both front and back side images of the medical insurance cards.
- Make sure images are not blurry and there is no glare, shadow, or holographic reflection on the images.

Several changes have been made to Lytec for this new feature:

Updated Patient screen

The Patient screen has been updated.

New button

There is a new button on the Patient screen: Get Card Data. Click this button to open the Select Card Images screen.

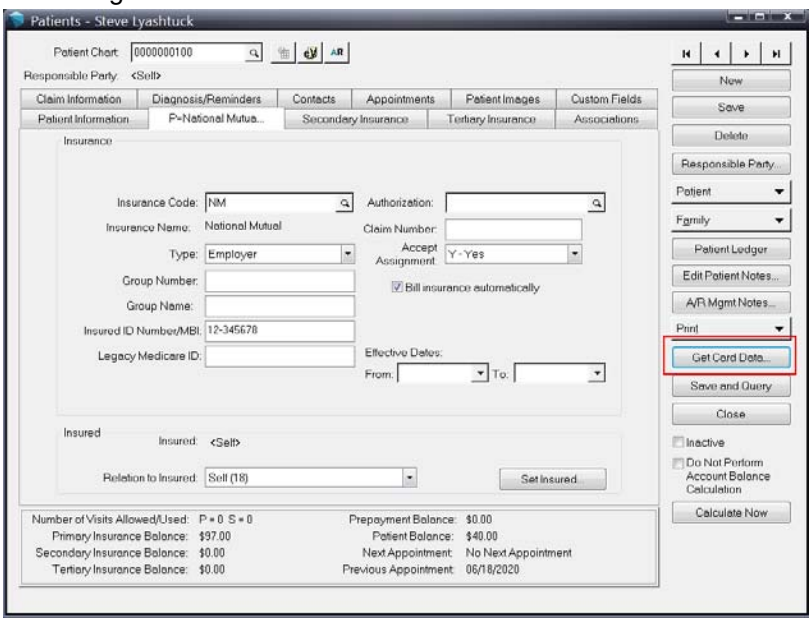


Figure 14. Primary Insurance tab

The Get Card Data button will be disabled if the focus is not on one of the three insurance tabs of the patient record.

Select the insurance tab that the card information will populate: Primary, Secondary, or Tertiary.

Note: if there is already an insurance company populated in the Insurance code field, the scanned data will NOT change that information.

New Select Card Images screen

When you click the Get Card Data button, the new Select Card Images screen will open. Use this window to select the images in the patient's record that you want read.

Note: You can select previously scanned cards from here or scan once you start this process and then select the scanned image.

Figure 15. Select Card Images screen

- If the insurance card was scanned as a duplex image, click Select for the Front/Duplex Image option and Lytec will place the images in the corresponding front and back sections.
- If the insurance card was scanned as two separate images, use the appropriate Select buttons to select the correct side of the card.

When you click Select for either option, the Select an Image screen will open. It will display all of the images in the patient's record. If you need to scan a new image, you can do it from here.

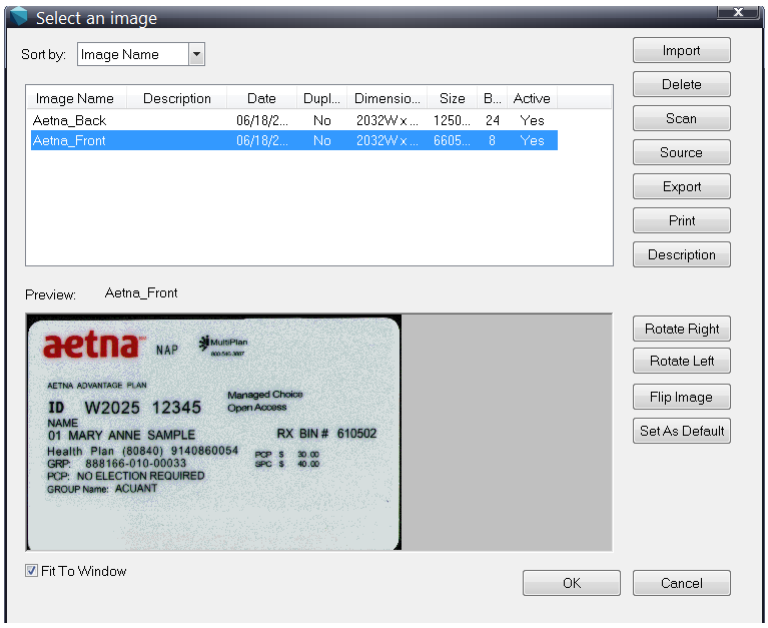


Figure 16. Select an Image screen

You can check if the image is a duplex scan by double-clicking the image name. The Image Name screen will open and the Duplex check box will show you if it is a duplex scan.

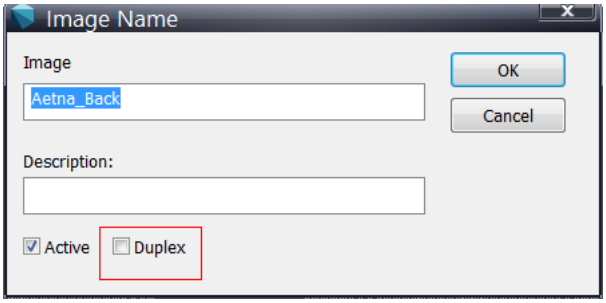


Figure 17. Image Name screen

Note: you can change the scan to duplex here by selecting the Duplex check box. Then, click the OK button.

Select the image you want and click OK. The Select an Image screen will close and the scanned image will appear in the Select Card Images screen.

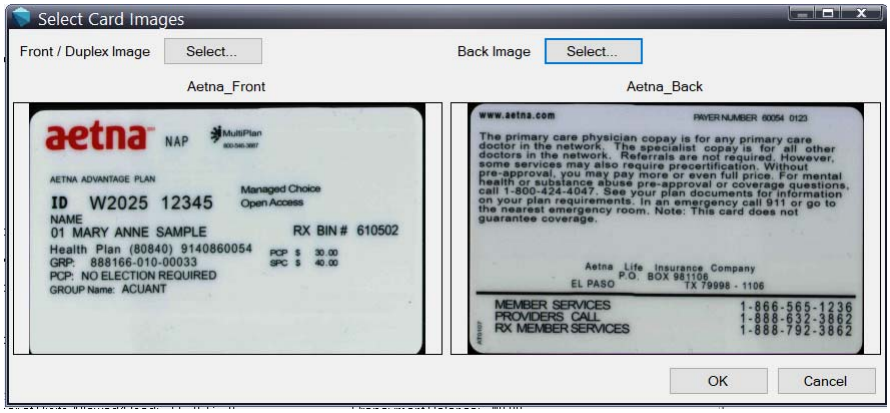


Figure 18. Select Card Images screen

To have the system send the card data to Acuant and update the patient's record, click the OK button.

New Validate Card Data screen

Information that is returned from the OCR service will populate the Validate Card Data screen. You can use this screen to verify that the information is correct and make any changes that you want.

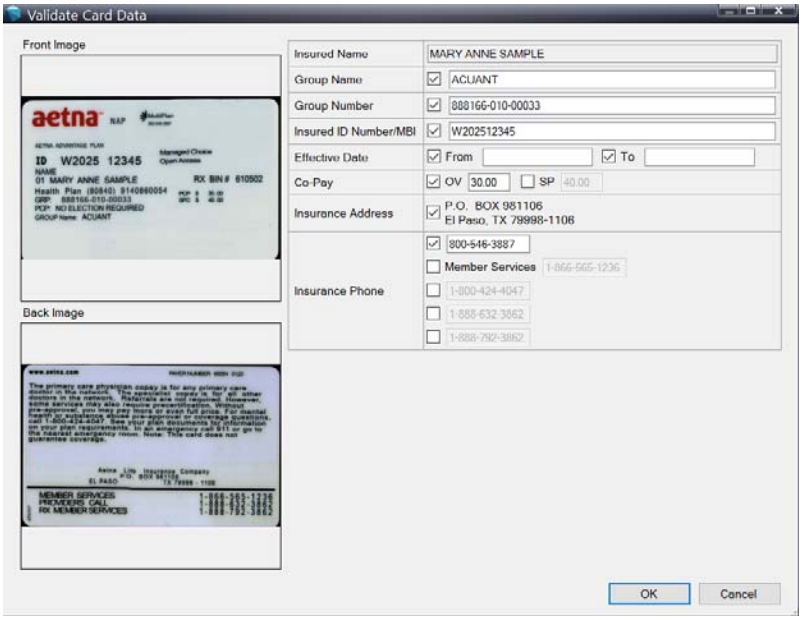


Figure 19. Validate Card Data screen

When the Insurance name is returned by the OCR scan, it will display that name in the right-side data field for Insurance.

Edit any fields as necessary and check the appropriate box for Co-pay OV (Office Visit) or Co-pay SP (Specialist), if more than one is returned, so it can populate the Lytec Co-pay field correctly. As a default, OV is preselected. Note if the insurance card does not contain Co-pay information, the Copayment Amount field will not display on the Validate Card Data screen.

If this is a new insurance company and multiple phone numbers or multiple addresses appear, choose the number or address that is appropriate for your practice to use for contacting that insurance company.

Click OK and the edited data is returned to Lytec, which will populate the data fields.

Note: The Insurance Code, Insurance Name, and Insured cannot auto-populate, you will see Scanned Data sections on the Insurance tabs (see "Updated Insurance tabs" on page 15 below).

This data will be cleared when you close the patient record.

Updated Insurance tabs

Once you have scanned data, the Insurance tab will show you scanned data.

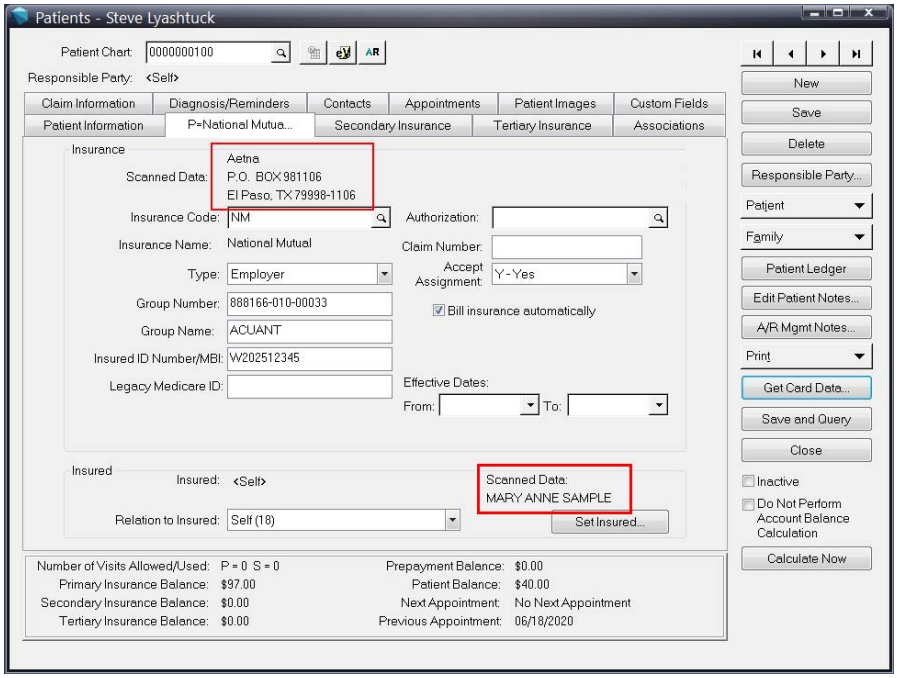


Figure 20. Patient screen - Primary Insurance tab

This information is present for reference purposes. You can use it to select the correct Insurance Code from the list of Insurance Codes for this tab.

If this is an insurance company that is currently not listed in Lytec, you can select the magnifying glass on the Insurance Code field, and click Add. The scanned data will appear in the screen and you can create a new Code and click OK.

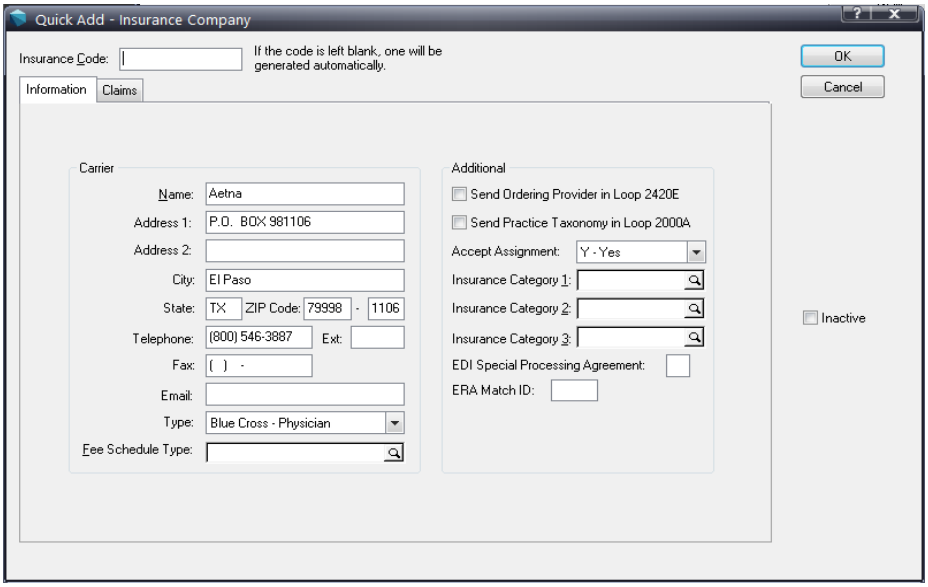


Figure 21. Quick Add - Insurance Company screen

The selected insurance and other data saved in the Validate Card Data screen will populate the Primary/Secondary/Tertiary Insurance tabs of the Patient record that was open when the original Get Card process to conduct the OCR scan was started.

The Co-pay amount populated in Lytec on the Patient Information tab will be the amount that the user selected with the radio button in the Validate Card Data screen for either OV or SP.

Updated report

The Audit Trail report has been updated so that you can see a list of successful OCR scans. For more information, see “Updated Audit Trail report” on page 40.

Procedure

Adding Insurance information

To add insurance information to a patient’s record:

1. Open Lytec and select Patients > Patient. The Patient screen opens.
2. Click the **New** button to clear any data, if necessary.
3. Enter basic information for the new patient if it is a new patient.
4. Click the **Patient** button on the right (or skip to step 8 and scan from there).
5. Select Images. The Patient Images screen opens.
6. Scan in the patient’s insurance card. If the card has already been scanned, either select it from the list or select Import.
7. Select the appropriate Insurance tab on the patient record.
8. Click the **Get Card Data** button.
9. Select the correct image(s) from the patient’s record (if an image needs to be scanned you can do it now).
10. Once the image is selected, click the **OK** button.
11. Click the **OK** button on the Select Card Images screen. The image is sent to the OCR scanning software and is displayed in the Validate Card Data screen.
12. Verify the details of the card on the Validate Card Data screen and click the **OK** button. The Validate Card Data screen closes and the information is displayed on the Insurance tab of the patient’s record.
13. Click the Insurance Code magnifying glass. The Find Insurance Company screen opens.
14. Select the insurance company and click the **OK** button. If you need to select or add an insured do so using normal Lytec process. you can see the Insured who was returned as a reference.
15. If you need to add the insurance company, click the Insurance Code magnifying glass. The Find Insurance Company screen opens.
16. Click the **Add** button. The Quick Add - Insurance Company screen opens with the scanned data populating the fields.
17. Verify the information and click the **OK** button.
18. Click the **OK** button on the Find Insurance Company screen.

19. Click the **Save** button on the patient's record.

IMO - Enhanced ICD Search

New Diagnosis Code Search

There is a new diagnosis code search that you can use to find and add diagnosis codes to your practice.

This new content will be available only by the VAR/user purchasing a IMO-ICD "product" or "subscription". After purchase, a Subscription/Product code will be placed in the Customer's Subscription list and will be queried by Lytec to determine if the customer can be granted access to this feature.

You can launch IMO - Enhanced Code Search from all places in Lytec where you can launch the Find Diagnosis screen:

- Find Diagnosis code screen in Lists: This screen is opened from Lists > Diagnosis Codes. Then, clicking the magnifying glass on the Diagnosis Code field.

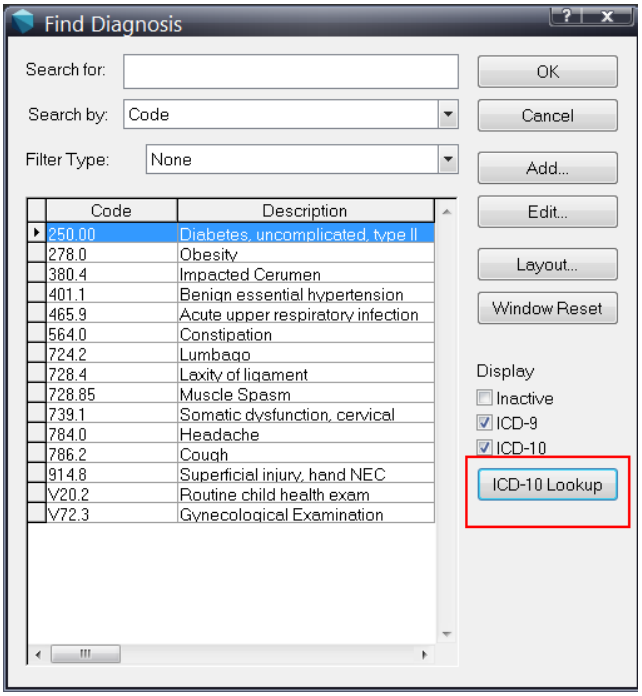


Figure 22. Find Diagnosis screen

- Find Diagnosis screen in Charges and Payments

When you first open Diagnosis Code Search, it will appear like this:

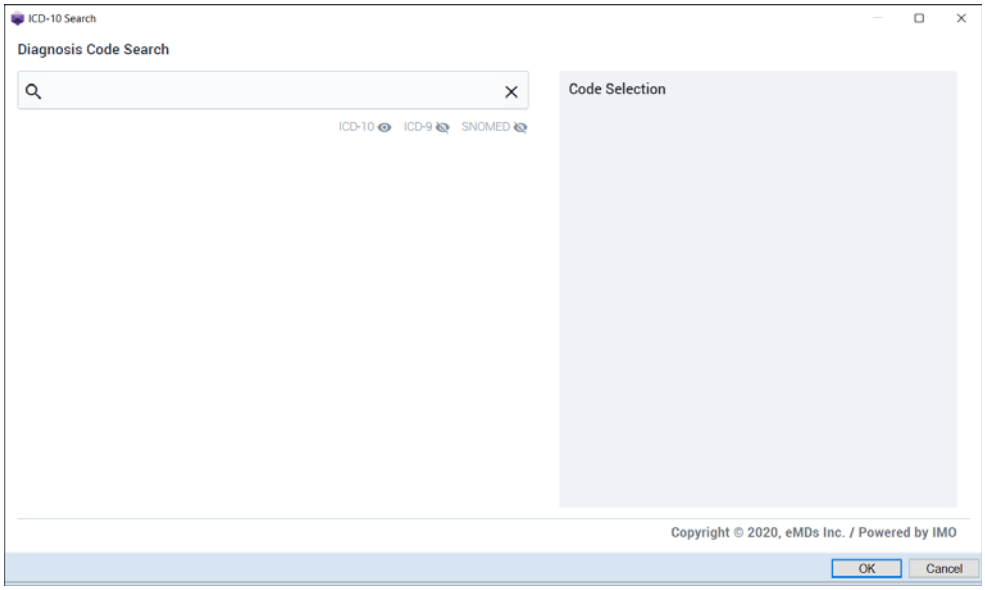


Figure 23. Diagnosis Code Search screen

Searching for and selecting codes

Searching for codes

Search for a code by entering the code description or part of the description. The type ahead search feature will display codes automatically after you have entered three characters. Then, either scroll through the list of results or continue to type in the description to refine the search.

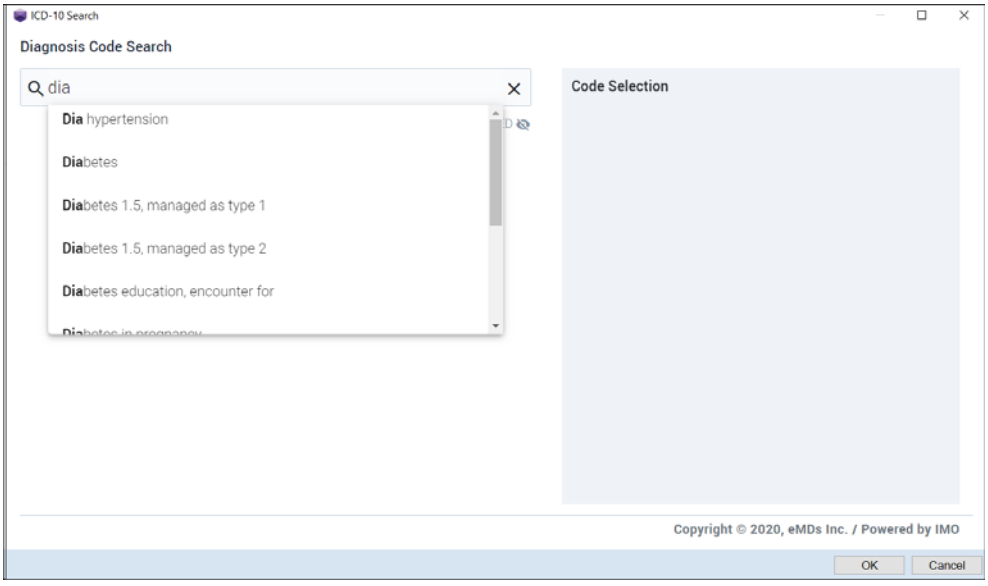


Figure 24. Diagnosis Code Search screen - type ahead results

You also can type a search term or partial search term (for instance, one or two characters) and press **Enter**.

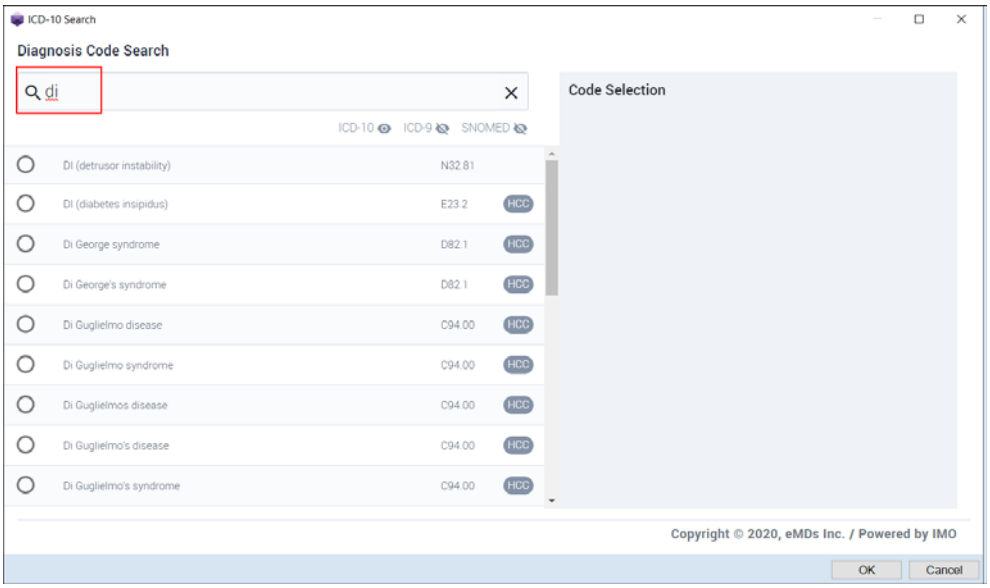


Figure 25. Diagnosis Code Search screen - Enter key pressed

Codes that were located appear in the section below the Search field. When the search results include a diagnosis with multiple ICD-10 codes, a plus sign (+) displays next to the diagnosis code.

Figure 26. Diagnosis Code Search screen - + sign highlighted

Selecting such a code by clicking the radio button to the left of it will display all diagnoses associated with that item.

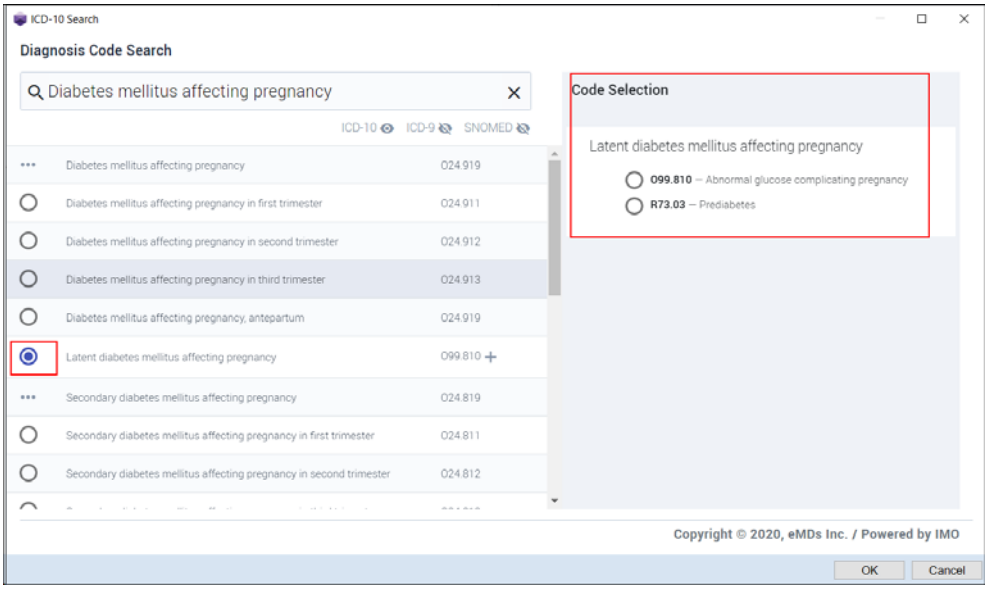


Figure 27. Diagnosis Code Search screen - Code Selection section highlighted

You can also hover over or click the plus sign (+) to display a screen that shows the **additional ICD-10 codes** for the diagnosis code.

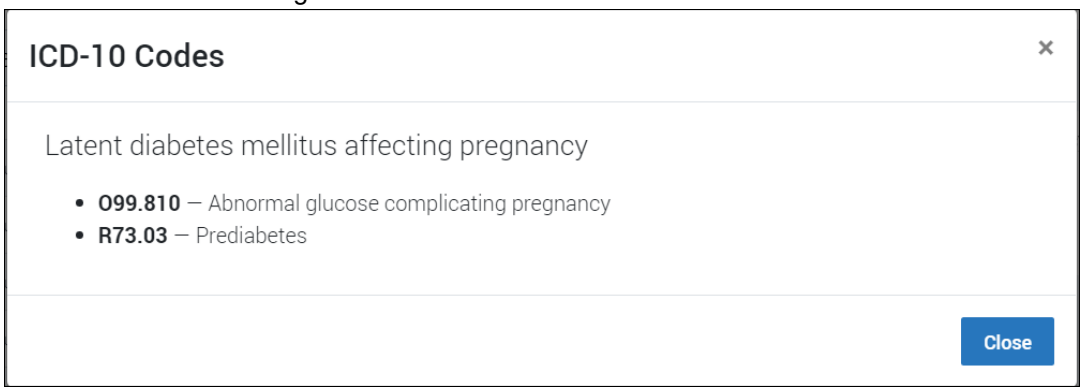


Figure 28. ICD-10 Codes modal

Selecting codes

To select a code, click the radio button to the left of the code in the main search section.

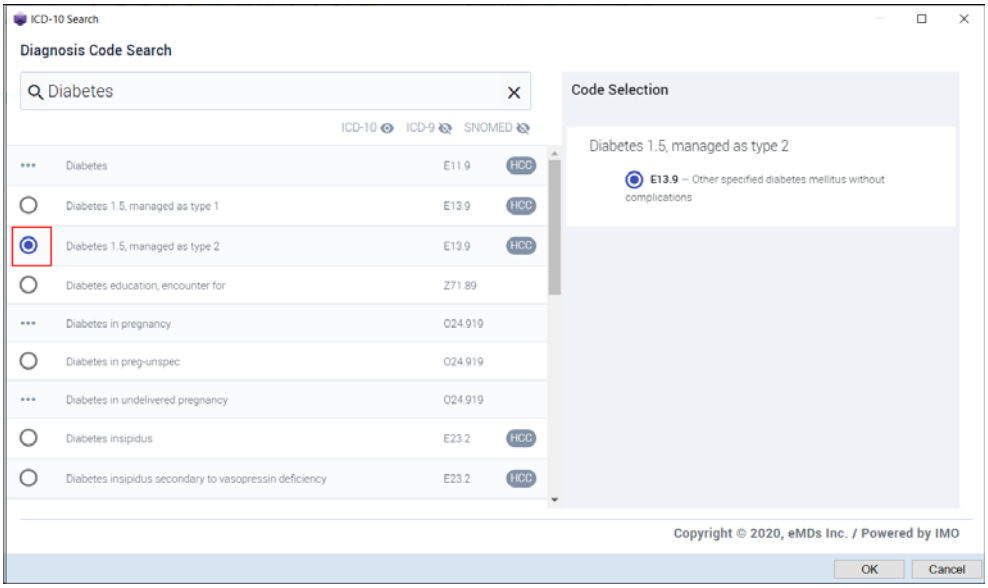


Figure 29. Diagnosis Code Search screen

The selected code will appear at the right in the Code Selection section, with the radio button selected there (if there is only one item for the selected code).

To add the code to your list of codes in Lytec, click the OK button in the bottom right. On the Find Diagnosis screen the CD-10 Code and Description fields will be populated.

Then, click the Save button on the Find Diagnosis screen in Lytec.

Note: if you enter an ICD-10 code in the Diagnosis screen before you click the ICD-10 Lookup, the Search screen will be scoped to related items when you launch it.

For items that have multiple codes, when you click the radio button to the left of the item in the search, all codes for that item will appear in the Code Selection section on the right.

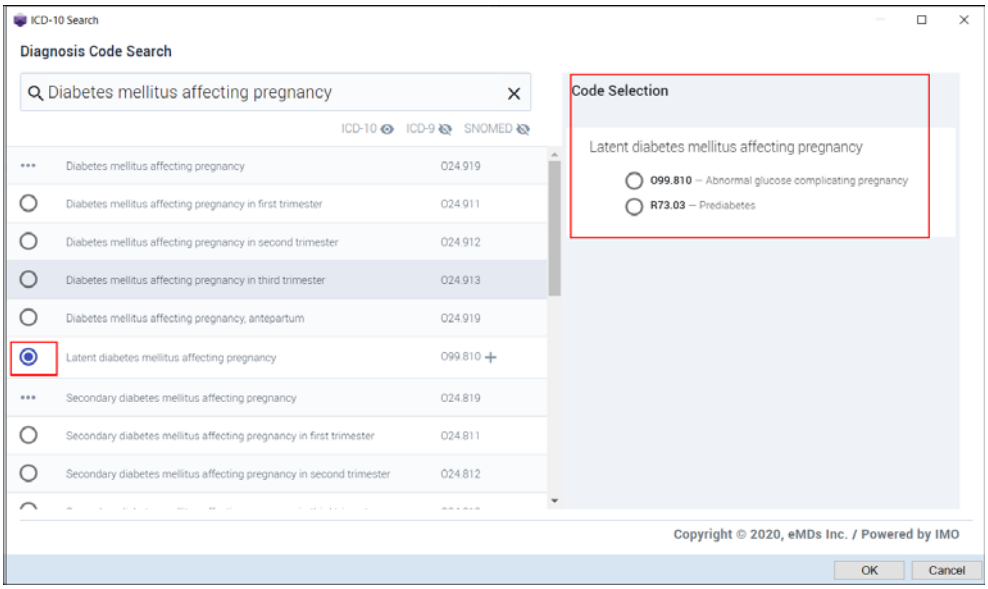


Figure 30. Diagnosis Code Search screen

In this case, to select a code, select one of the radio buttons in the Code Selection section. Then, click the OK button.

Note that you can add only one code at a time to your Lytec Diagnosis Code list.

To de-select a code, select a different radio button or click the Cancel button on the bottom right to close the Diagnosis Code Search screen.

Viewing and hiding code types

By default, only ICD-10 codes will display in the search results when opening the Diagnosis Code Search screen. However, you can choose to view ICD-9 and SNOMED codes by clicking the View (Show/Hide) icon shaped like an eye.

- The View (show) icon will display for code types that are marked for display.
- The View icon with a slash (hide) will display for code types that are hidden.

Figure 31. Code Types

When all code types are displayed, the screen will appear like this:

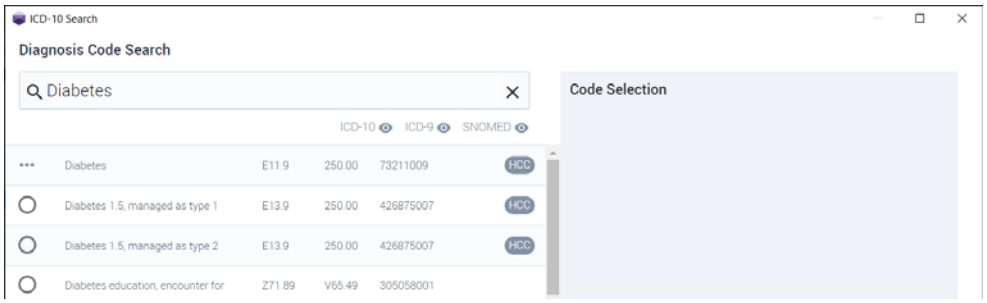


Figure 32. Diagnosis Code Search screen

Hovering over an ICD-10 code will display the information for that code.

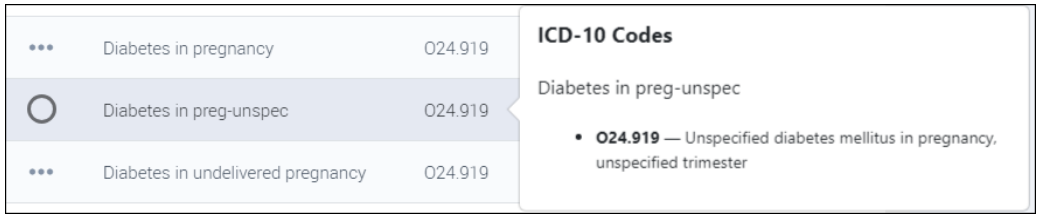


Figure 33. Diagnosis Code Search screen - hover over displayed

Click the ICD-10 code and a modal screen will open showing the information.

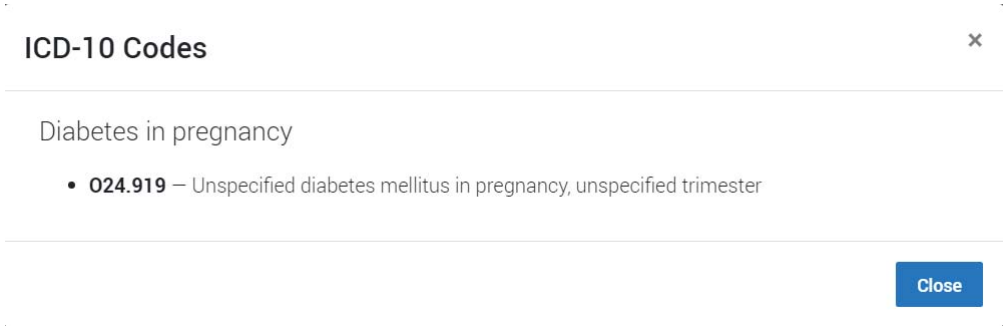


Figure 34. ICD-10 Codes modal

Viewing and selecting modifiers

The More Options button (ellipsis) indicates that there are modifiers available for the diagnosis code. The use of the term modifier refers to qualifying, or refining, the diagnosis code and has no impact on billing.

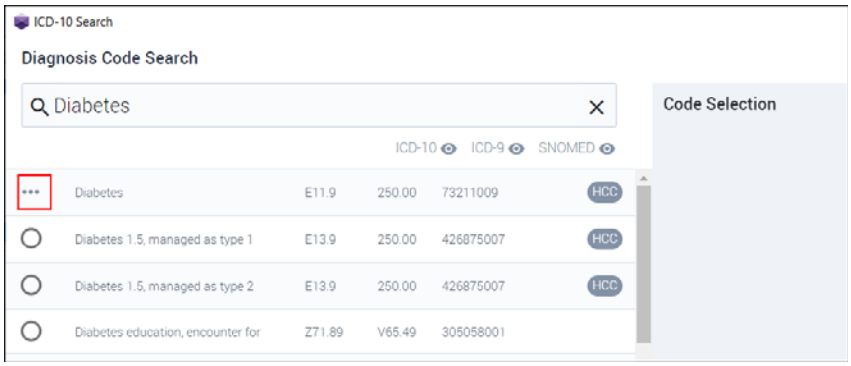


Figure 35. Diagnosis Code Search screen - with More Options button highlighted

Click the More Options button to open a screen that displays modifier groups that allow you to refine the search results.

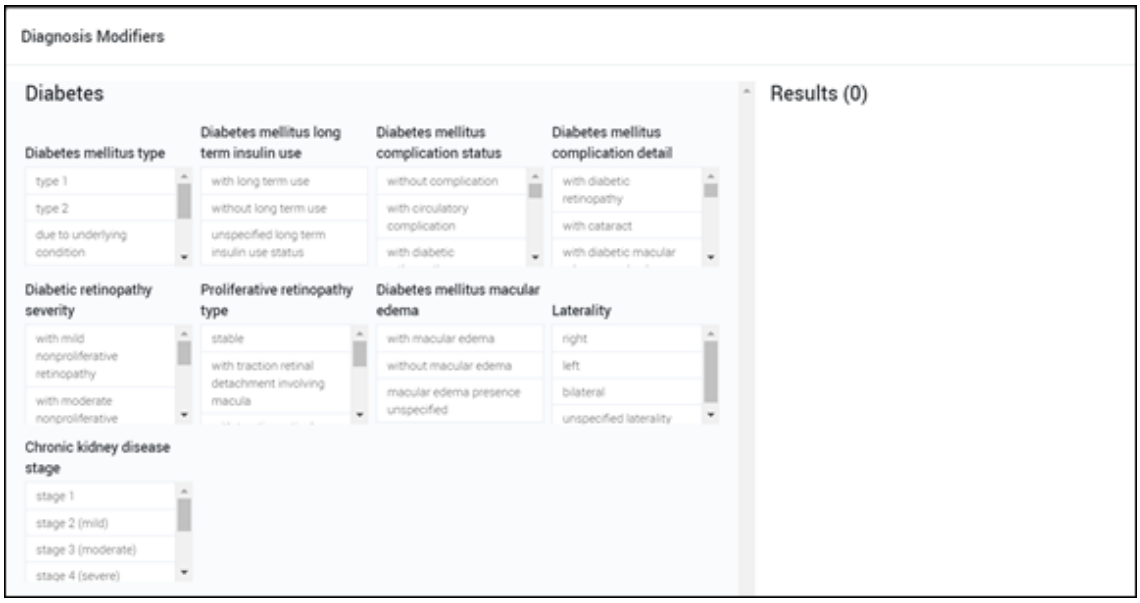


Figure 36. Diagnosis Modifiers screen

When you select a modifier item in one of the category boxes, a more specific list of modifier results will display in the Results section. The system will hide all incompatible modifier items in the other modifier groups, as well as all items in the active modifier container. Only one selection per modifier group is allowed.

To de-select a modifier, click it again. All of the modifiers and categories will be restored.

Figure 37. Diagnosis Modifiers screen - Results highlighted

Note in the figure above that the selected item is now highlighted in light blue.

You can continue to make selections to narrow the results. For instance, after selecting type 1 or type 2 in the Diabetes mellitus type category box, selecting **without complication** from the **Diabetes mellitus complication status** box will reduce the results to a single item and **without complication** is also highlighted.

Figure 38. Diagnosis Modifiers screen

Selecting modifiers

Click all necessary diagnosis modifiers in the category boxes to refine the search. Then, click the Select button in the Results section to select the desired code. You can select only one code.

Figure 39. Diagnosis Modifiers screen

Then, the Diagnosis Modifier screen will close and the selected code will display in the Code Selection section of the Diagnosis Code Search screen. If multiple codes appear, select the one you want in the Code Selection section.

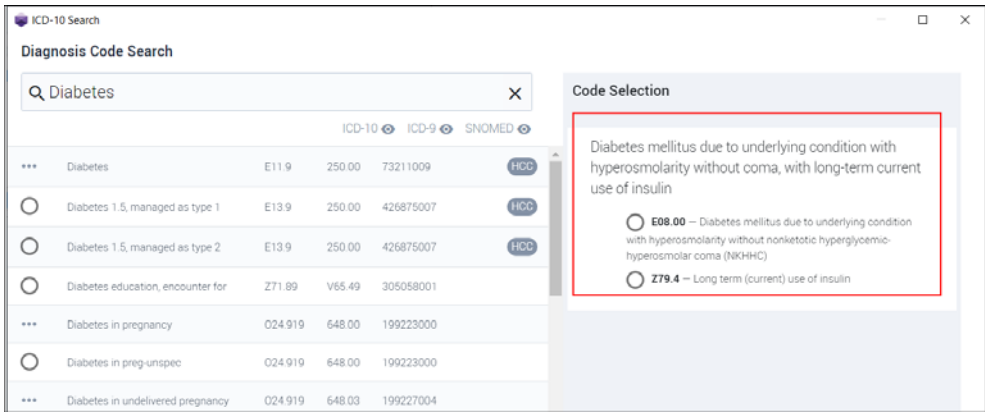


Figure 40. Diagnosis Code Search

Then, click the OK button to add the code on the Diagnosis (new) screen.

Finally, click the OK button on the Find Diagnosis screen.

Risk Score display

If an IMO diagnosis code has risk score results, an HCC (for Hierarchical Condition Categories) icon appears at the far right of the description. Hover your mouse pointer over this icon to display the risk results data. The data displays in two columns: **RxHCC Information** and **HCC Information**.

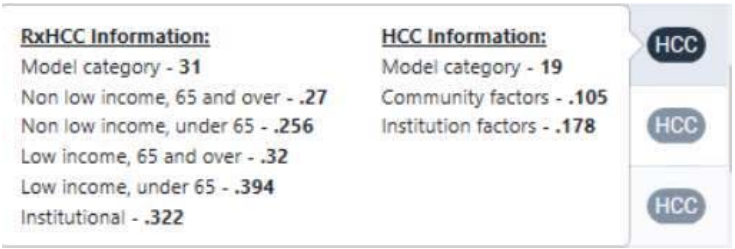


Figure 41. Diagnosis Code Search screen - Risk hover over

Although the HCC Risk Category information is displayed for some codes, this information is not included in nor automatically carried over to the Diagnosis Code list in Lytec. It is provided for information and not used elsewhere for a selected diagnosis.

Eligibility Patient Demographic Query & Update

You can now complete a new or existing patient's demographic information as part of an eligibility check in Lytec. Once basic information for the patient has been entered into Lytec, performing an eligibility check will initiate a deposit of patient data into the existing Pending Patients feature. Then, you can update and import that information into the patient's record.

Eligibility Information

- When an eligibility request is sent, it will use the current system date as it always has.

- The patient's insurance carrier may or may not send complete demographic information back with the Eligibility Request. Each payer is different.

As part of this feature, several updates have been made in Lytec.

Updated Patients screen

New button

There is a button on the Patients screen: Save and Query (also Ctrl + F9). Click this button to save a new patient's record and initiate the eligibility request. Data that returns from your clearinghouse will populate the Pending Patients screen. You can then verify and modify the data and save it to the patient's record.

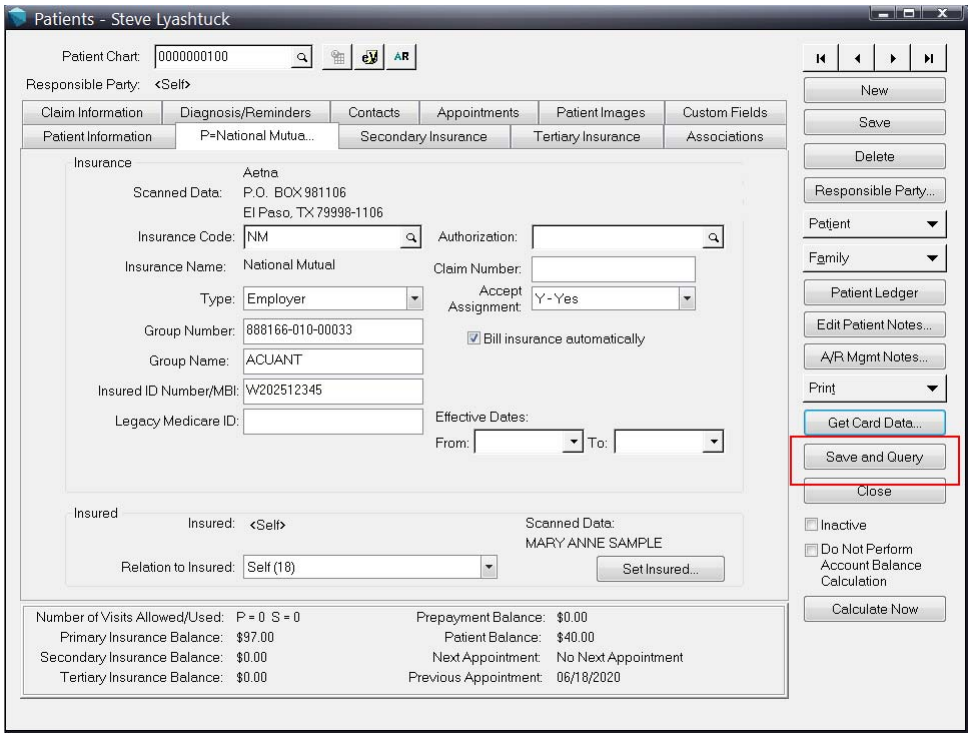


Figure 42. Patients screen

The minimum required fields for performing an eligibility check are as follows:

- LAST NAME (from Patient Information tab)
- FIRST NAME
- MIDDLE NAME
- BIRTH DATE
- PRIMARY INSURANCE CODE (from Primary Insurance tab)
- INSURED ID NUMBER/MBI (from Primary Insurance tab)
- PROVIDER (from Associations tab)

eMDs recommends that you make these fields required for all new patient records.

Eligibility check for existing patients

After the request completes, the eligibility results appear; and then when that screen is closed, the pending Patient screen opens.

When viewing the Pending Patients screen, data returned from the eligibility request that differs from existing patient fields will automatically populate/overwrite data on the left side.

On the left side Patient screen, changed data fields appear with a red field label and a red flag is on any tab where any data was updated. The right side displays the new values returned from the Eligibility request, as well as the previous values for reference.

Exceptions:

- If zip code+4 comes in as blank AND zip from the request returns a different 5 digit zip, the system will update the 5 digit zip and blank out the +4.
- If address 2 comes in as blank AND address 1 changed, the system blanks out address 2.
- For all other fields, the system will never overwrite a field with an incoming blank value. So if the request does not return a value, the system will not blank out a previously-populated field.

Procedure

Eligibility check for new patient using the Patients screen

1. In Lytec, select Lists > Patient > Patients. The Patients screen opens.
2. Click the New or Cancel button depending on your setup.
3. Enter the required information for the new patient.
4. Click the **Save and Query** button. The eligibility request is initiated and the Eligibility Verification Results screen opens.

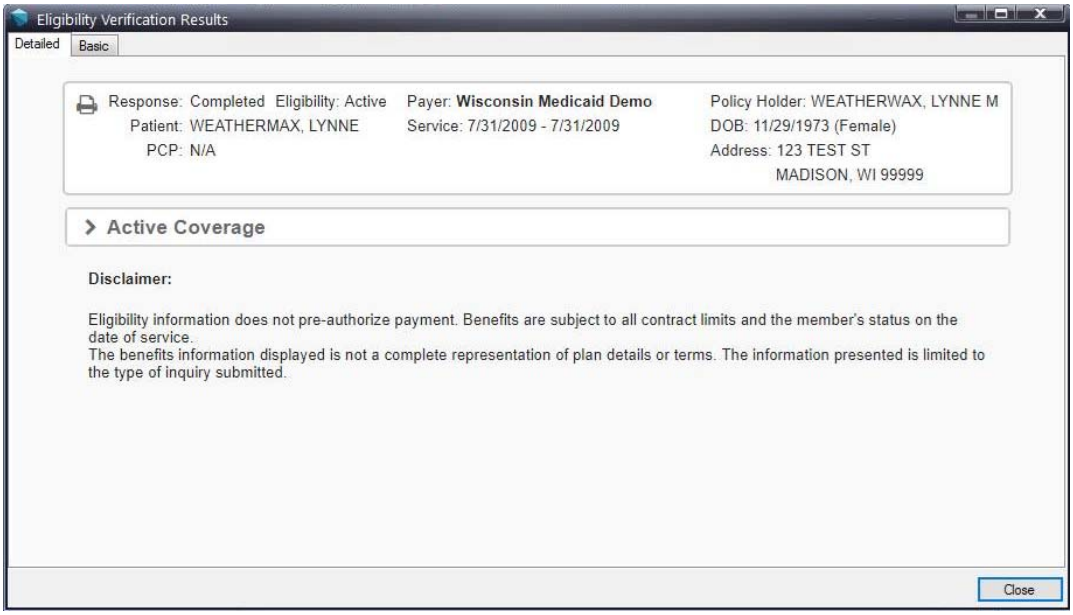


Figure 43. Eligibility Verification Results screen

5. Close the Eligibility Verification Results screen. The Patient record and Pending Patients section open.

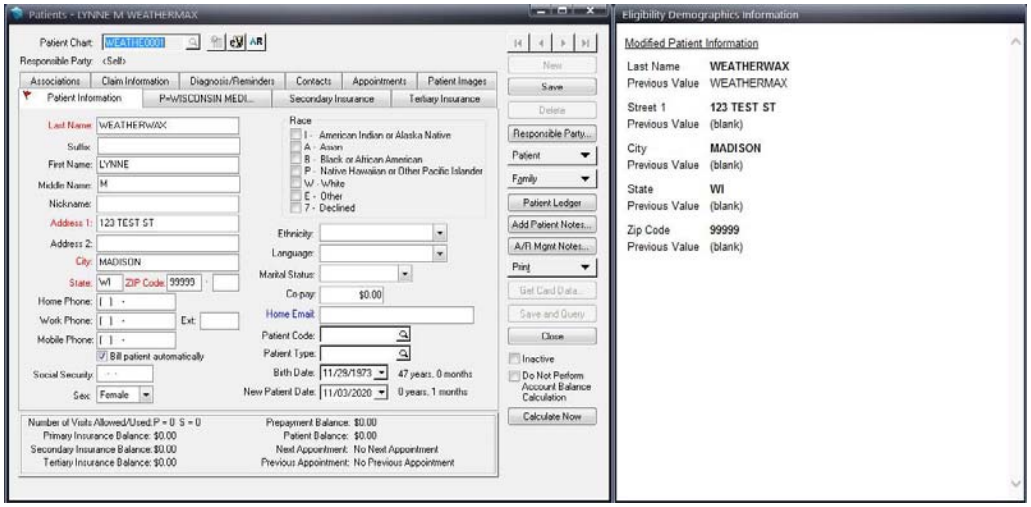


Figure 44. Patient record with Pending Patients section displayed

Changed data appears with a red field header and a red flag on tabs with changed data on the Patients screen on the left. The right side displays the new value and the previous value.

6. Review and update the data as necessary.
7. Click the **Save** button to save the updated record and close the Pending Patients section. Otherwise, click the **Close** button to leave the record without saving. A confirmation window will appear to verify you wish to close without saving.

Note: if the Pending Patient results are not saved, they will not appear in the Pending Patient list to be worked later like other Pending results from a Mobile Intake do. However, you can later import the pending demographics using the new Import Demographics feature (see "Updated Eligibility Verification Results screen" on page 31 below).

Updated Insert/Edit Appointment screen

New button

There is a new button on the Insert/Edit Appointment screen: Save and Query. Clicking this button enables you to perform an eligibility verification for a patient while creating the appointment. This option will speed up the process of entering a new patient and checking that patient's eligibility.

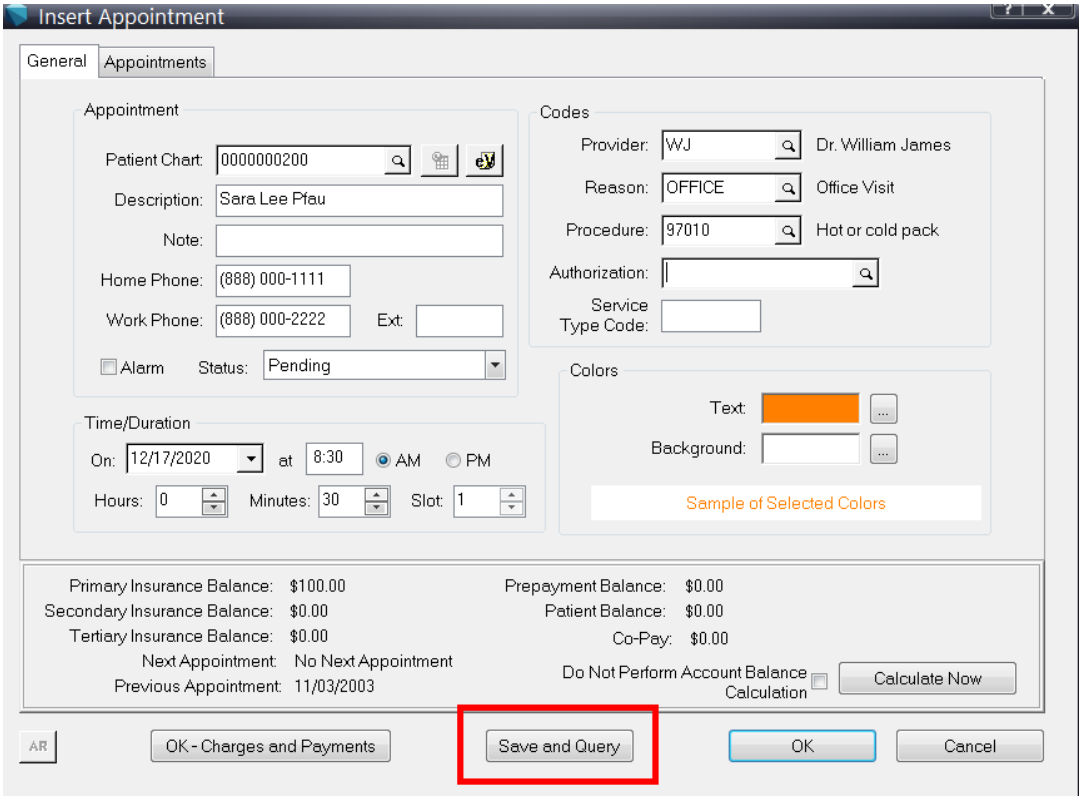


Figure 45. Insert Appointment screen

Procedure

Scheduling an appointment for a new patient and performing an eligibility check

1. On the Lytec Scheduling menu, select Schedule Appointments.
2. On the Appointments screen, right-click an empty time slot and click Insert. The Insert Appointment screen opens.
3. Click the magnifying glass on the Patient Chart field. The Find Patient screen opens.
4. Click the Add button. The Quick Add - Patient screen opens.
5. Fill out the information on the screen and click the **OK** button.

   Note: listed above is the minimum required information to save a patient record for eligibility checking. eMDs recommends that you require complete information at this time.

6. Ensure the new patient is highlighted on the Find Patient screen and click the **OK** button. The new patient's information populates the Insert Appointment screen.

7. Click the **Save and Query** button. The eligibility request is initiated and the Eligibility Verification Results screen opens.
8. Close the Eligibility Verification Results screen. The Patient record and Pending Patients section open.

   Changed data appears with a red field header and a red flag on tabs with changed data on the Patients screen on the left. The right side displays the new value and the previous value.
9. Review and update the data as necessary.
10. Click the Save button to save the updated record and close the Pending Patients section. Otherwise, click the Close button to leave the record without saving. A confirmation window will appear to verify you wish to close without saving.

Updated Right-click menu

New option

There is a new option on the right-click menu for the Appointment scheduler: Patient Demo Quick Query. Selecting this option for an existing appointment will perform an eligibility check for the patient and send additional demographic data back to Lytec to update the patient's record.

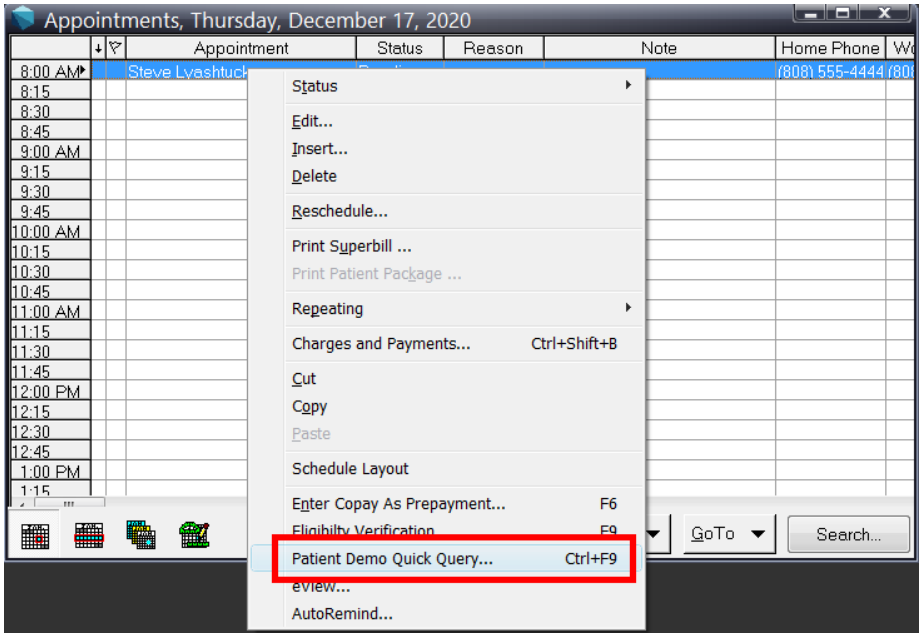


Figure 46. Right-click menu for Appointment scheduler

Procedure

1. On the Appointments screen, right-click an appointment and select Patient Demo Quick Query.
2. The eligibility request is initiated and the Eligibility Verification Results screen opens.
3. Close the Eligibility Verification Results screen. The Patient record and Pending Patients section open.

Changed data appears with a red field header and a red flag on tabs with changed data on the Patients screen on the left. The right side displays the new value and the previous value.

4. Review and update the data as necessary.
5. Click the Save button to save the updated record and close the Pending Patients section. Otherwise, click the Close button to leave the record without saving. A confirmation window will appear to verify you wish to close without saving.

Updated Eligibility Verification Results screen

New button

There is a new button on the Eligibility Verification Results screen accessed from the patient or from the main View eligibility results from the toolbar/ribbon: Import Demographics. Use this button to import patient demographic information from a previous, on-file eligibility result, without having to initiate a new eligibility request.

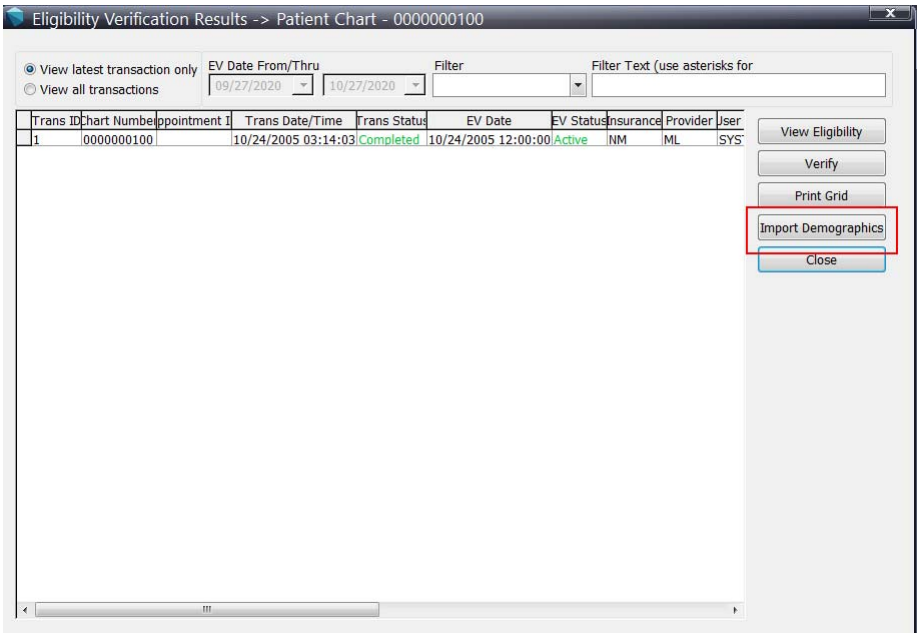


Figure 47. Eligibility Verification Results screen

If the selected result was performed using an earlier version of Lytec, you will receive an error message. This feature only works for results performed using Lytec 2021.

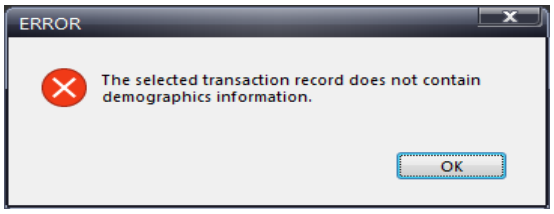


Figure 48. Error message

Patient information will appear in the Pending Patients section of the Patients screen and you will edit it and save it as you would other Pending patient information.

Procedure

1. On the Lists menu, select Patient and then Patients. The Patients screen opens.

   If you access Eligibility Results Verification from the menu/ribbon, select View Eligibility Results and proceed to step 4.

2. Select the patient from the Lookup.
3. Click the Patient drop-down on the right and select Eligibility Verification. The Eligibility Results Verification screen opens.
4. Select the previous result that you want to use to update the patient record.
5. Click the **Import Demographics** button. The Patient screen opens with Pending Patient information on the right.
6. Review and update the data as necessary.
7. Click the Save button to save the updated record and close the Pending Patients section. Otherwise, click the Close button to leave the record without saving. A confirmation window will appear to verify you wish to close without saving.

Charges and Payments

Updated A/R Tracking Notes

You can now add and delete A/R Tracking Notes while in Charges and Payments. Previously, you could only edit or view existing notes. Now, you no longer have to go to A/R Tracker to enter notes associated with a billing.

Updated button

The A/R Mgmt button on the Charges and Payments screen has been updated.

- If there are no tracking notes for the patient, the text to the left of the button says "Add A/R Mgmt." Clicking the button will open the existing A/R Tracking Notes screen and enable you to add a new A/R Tracking Note for the patient.

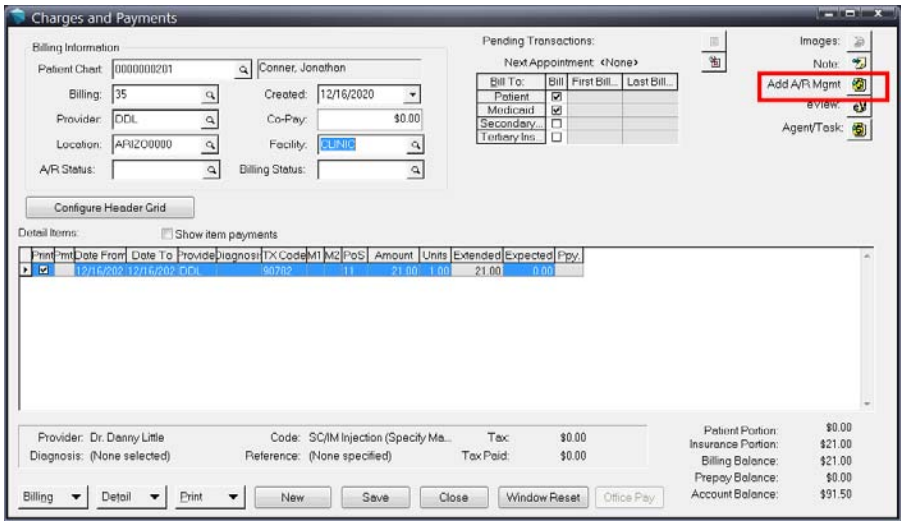


Figure 49. Charges and Payments screen

Note that a billing must be saved before you can create a note.

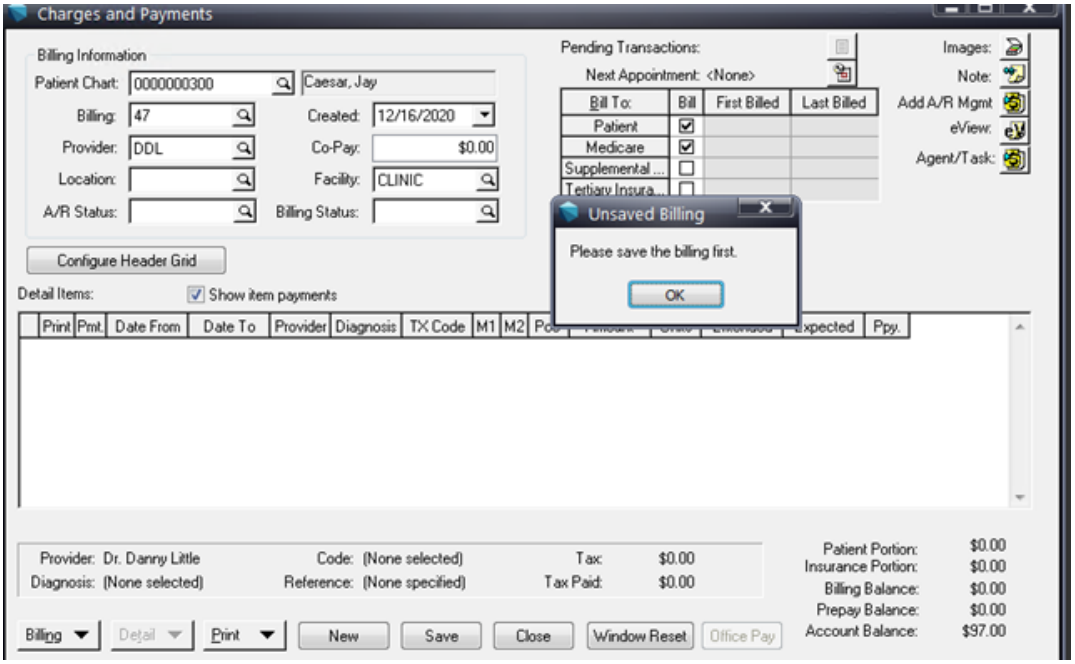


Figure 50. Charges and Payments screen

- If there is an existing note for the patient, the button will say “Edit A/R Mgmt.” Clicking the button enables you to edit, view, or delete the existing note.

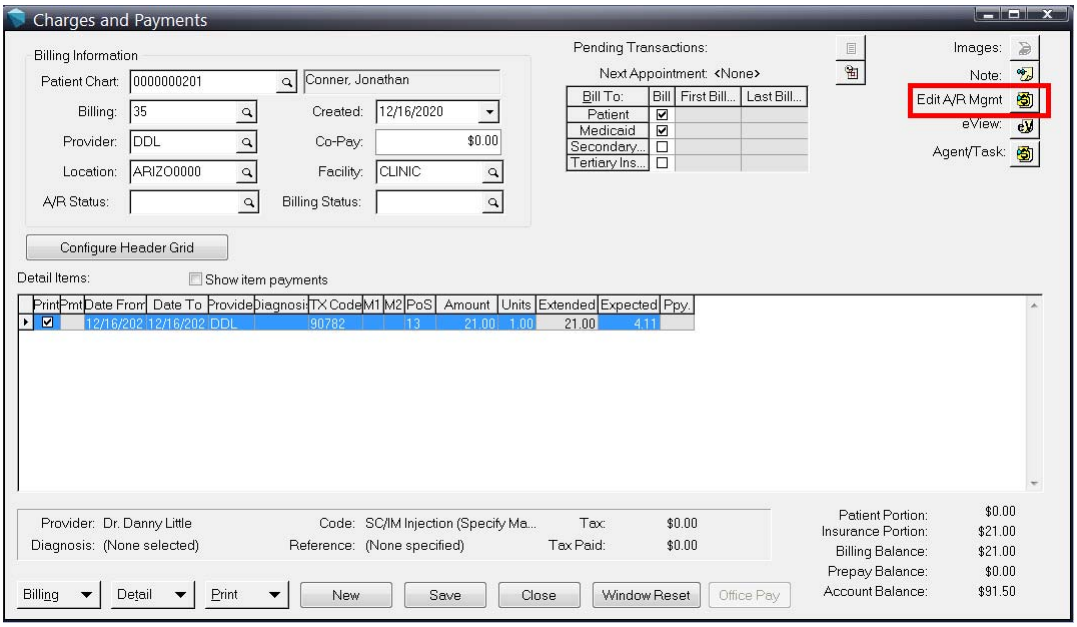


Figure 51. Charges and Payments screen

Updated A/R Tracking Note screen

New button

There is a new Delete button on this screen. Clicking this button will delete the note associated with the billing. You will see a confirmation screen before the deletion takes place.

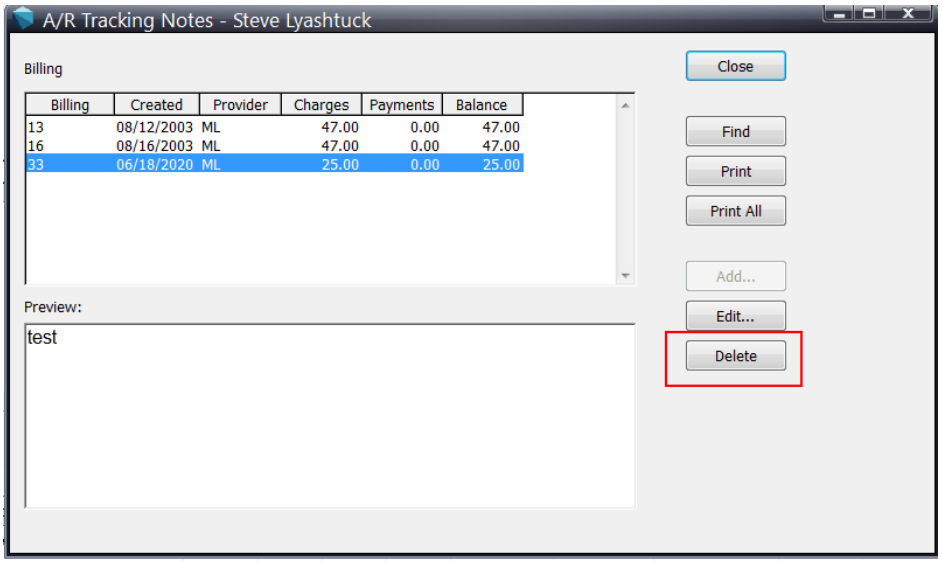


Figure 52. A/R Tracking Note screen

New Agent/Task button

There is a new button on the Charges and Payments screen: Agent/Task.

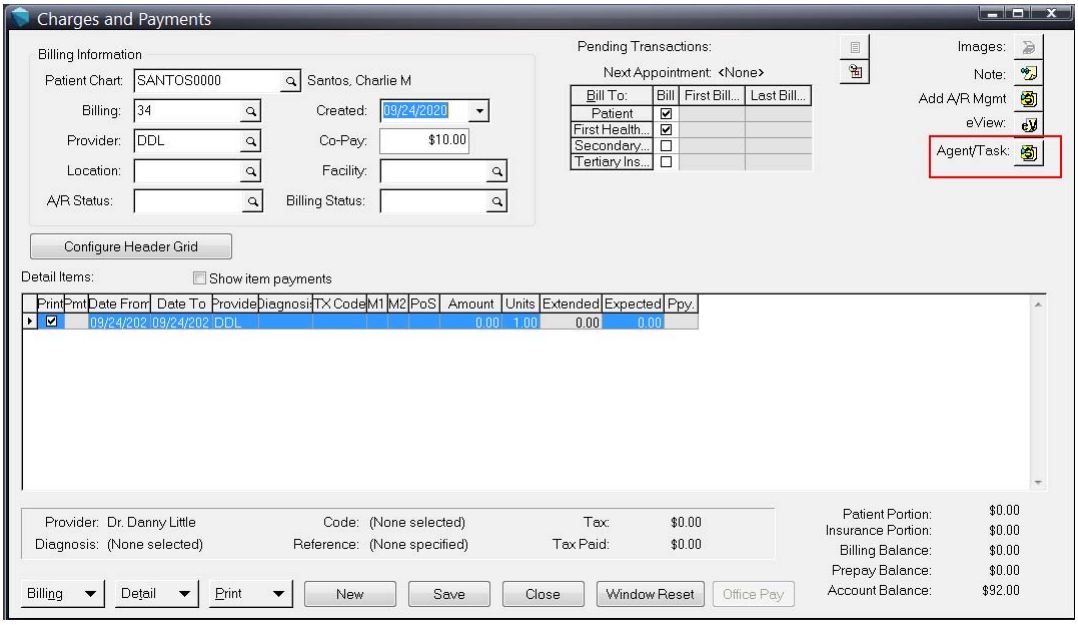


Figure 53. Charges and Payments screen

When you click this button, you will see a menu with options for assigning tasks and deleting tasks. For more information, see “New menu” on page 35.

If the selected billing does not have either a Patient or Insurance balance, the button will be disabled. In addition, the billing must be saved before you can add an agent/task.

New menu

This menu will open when you click the Agent/Task button on the Charges and Payments screen.

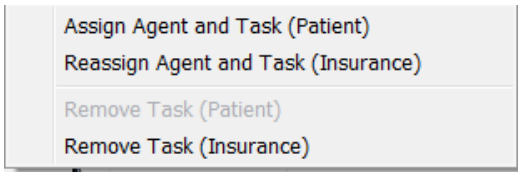


Figure 54. Agent/Task menu

The table below describes the options in this menu.

Option	Description
(Re)Assign Agent and Task (Patient or Insurance)	Select this option to open the Assign Selected Billing to A/R Management Agent screen, on which you can enter an agent, task, and due date. All fields are required. If there is already an agent or task assigned for patient or insurance, you can select to Reassign it.
Remove Task (Patient or Insurance)	Select this option to remove any assigned agent, task, or due date. You will receive a confirmation screen.

If there is no balance associated with the billing, the option on the menu will be disabled (grayed out).

Patient tags

Color-coding has been added to patients so that you can create a set of colors that represent various tags or identities that you can assign to selected patients with a color coding for instant identification of that patient based on the color shown when performing a Find Patient lookup.

Only one color can be associated (tagged) with each patient record. Once a tag has been associated with a patient, the patient line in Find Patient lookup and the patient name in Charges and Payments will be highlighted in that color.

Note: Any color assigned to a patient via a Patient Tag will only be visible in the Find Patient/look-up grid and will NOT override the color coding assigned to Appointment Reason codes or colors assigned to appointments in the Scheduler.

Updated Preferences

The Preferences on the Admin ribbon menu have been updated with a new tab that you can use to create your colors and tags.

New tab

There is a new tab in the administrative Preferences: Color Coding. Use the fields on this tab to create your unique color coding and tagging system for patients.

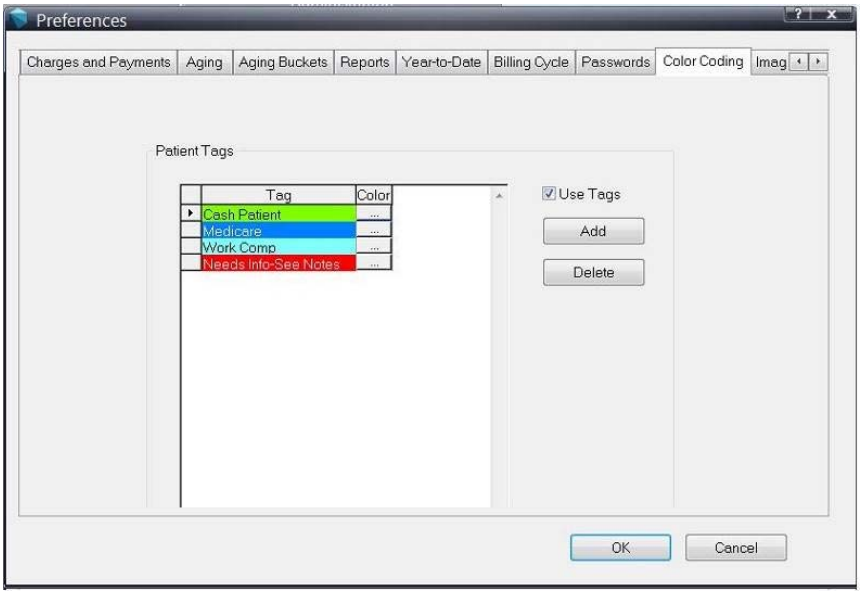


Figure 55. Preferences - Color Coding tab

The table below describes the elements on this tab.

Element	Description
Use Tags check box	Select this check box if you want to use color coding for patients. If this check box is CLEAR, you will NOT see color coding in either Find Patients or Charges and Payments.
Tag	Click in this field and type in a description for this color.
Color	Click in this field and select a color for the tag. This color will then show up as an option on the Set Patient Flag field on the Diagnosis/Reminders tab of the Patient record. Note: you can create a tag with a color but no description.
Add button	Click this button to add a new row for a new tag and color. The focus is put on the tag field of the new line.
Delete button	Select a tag and click this button to delete the existing tag/color.

Element	Description
OK button	Click this button to save all the changes.
Cancel button	Click this button to close the screen without saving any changes.

Once you've set up your colors and activated the tagging, you will be able to select a color for a patient and then see it on the Find Patient lookups in Lytec.

Note: if at some point after using the color tags you decide you no longer wish to use them, you can uncheck the Use Tags box in Preferences, and colors will no longer display. The tag field on the Diagnosis/Reminders tab will still be populated but will not do anything.

Updated Patient - Diagnosis/Reminders tab

There is a new field on the Diagnosis/Reminders tab in the patient record: Set Patient Tag. Use this field to select a color and/or Description for the patient.

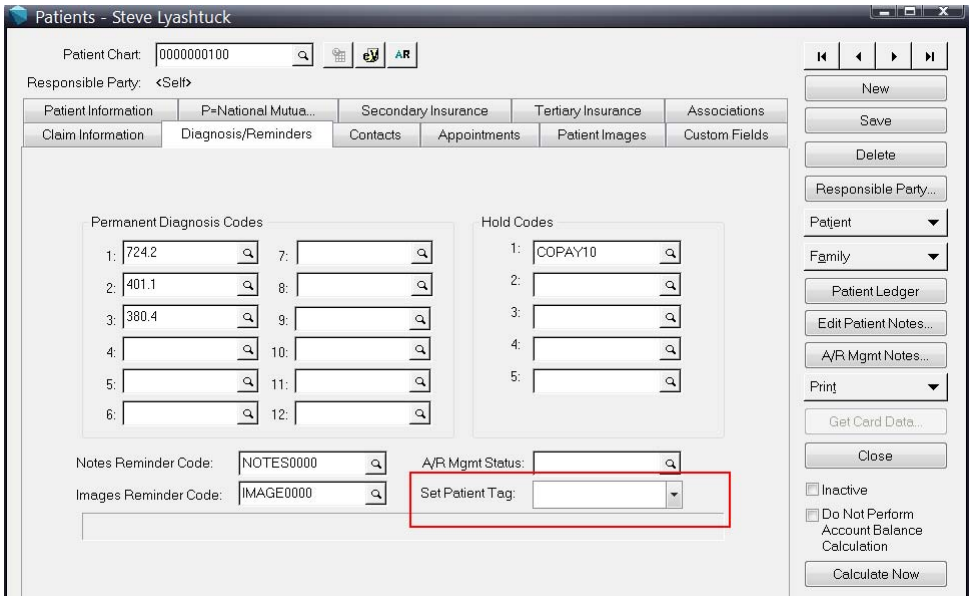


Figure 56. Patient - Diagnosis/Reminders screen

Updated Find Patient screen

The Find Patient screen has been updated to show the color set up for each patient. In addition, there is a color legend on the right for quick reference.

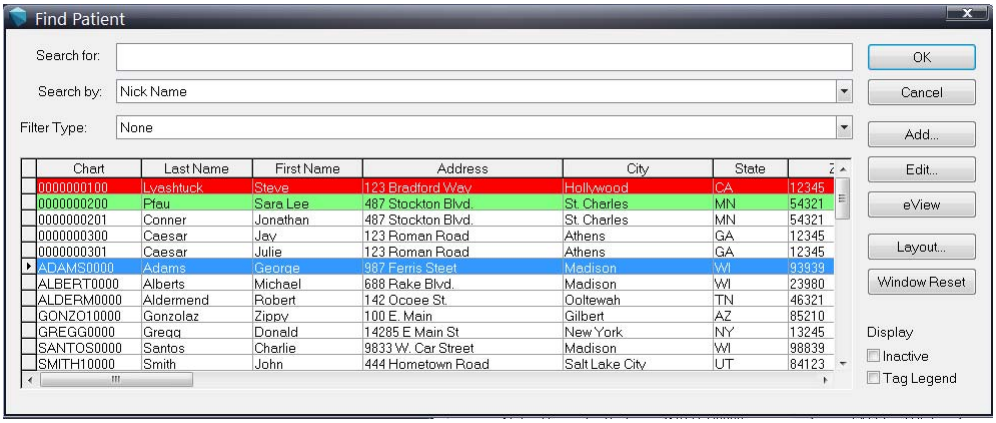


Figure 57. Find Patient screen

To see the color legend, select the Tag Legend check box. The default value is clear. The legend will show colors that have descriptions and those without descriptions.

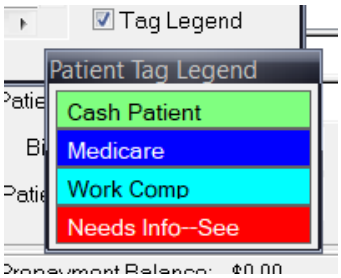


Figure 58. Color legend

Updated Charges and Payments

The patient's name on the Charges and Payments screen will now show the color set up for that patient. If no color has been set, the patient's name will appear with black text on white background.

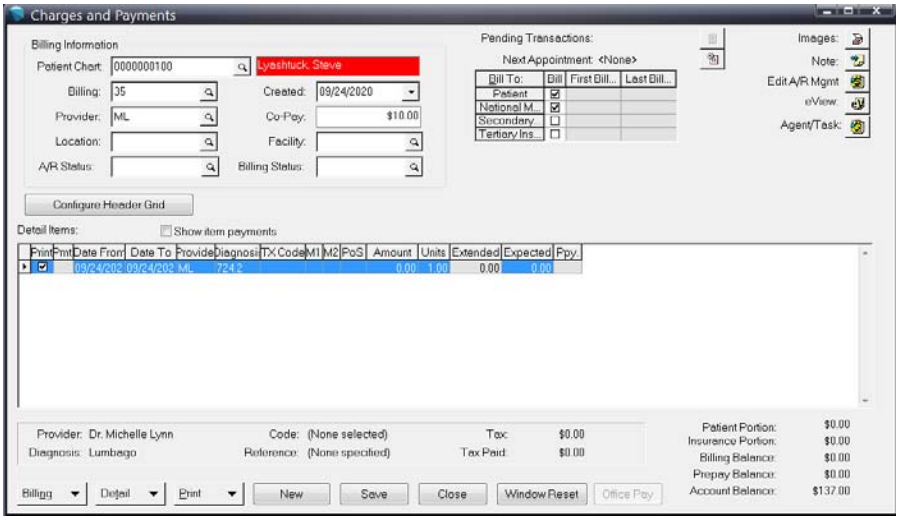


Figure 59. Charges and Payments screen

Setting up color coding

Follow these steps to set up color coding for your patients.

1. On the Admin menu, select Preferences. The Preferences screen opens.
2. Select the Color Coding tab.
3. Select the Use Tags check box.
4. Select a color and enter the Description that you want for that color.
5. Repeat for all the colors you want to set up.
6. Click the **OK** button to save the changes.
7. On the Lists menu, select Patient > Patients. The Patients screen opens.
8. Select a patient.
9. Select the Diagnosis/Reminders tab.
10. Select a color for the patient in the Set Patient Flag field.
11. Click the **Save** button to save the change.
12. Repeat for all the patients you want to tag with a color.

Appointments

Updated Day View

The Billing column of the Day View of the Appointment Schedule now shows the Billing Number for charges with the Date of Service of the appointment on the grid. Previously, it would show a Billing Number for any transaction, including payments with that Date of Service.

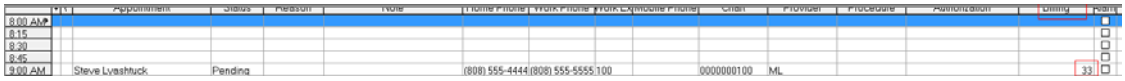


Figure 60. Schedule - Day View

Reports

Updated Audit Trail report

The Audit Trail report has been updated to show successful OCR scans. You can filter by date range and use the Keywords for the description in the Audit Trail for "OCR Get Card Successful" to report only the OCR Get Card scans for the time period filtered.

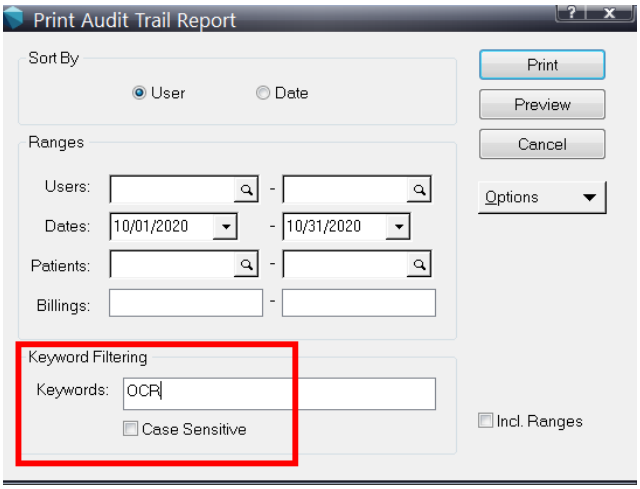
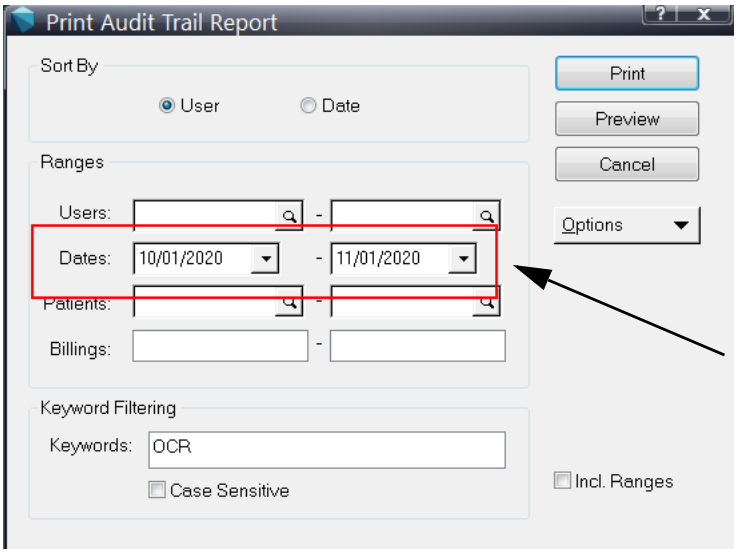


Figure 61. Print Audit Trail Report screen

Tip

- When the From and To dates are the same date, results for that date will print.
- When the From and To are not the same date, you must either leave the To date blank or enter a future date to get results performed on the last day.

Example: If you are running the report on 10/31/2020 for all OCR in the month of October, enter From: “10/01/2020” and To: leave blank or enter “11/01/2020”.



Date range for ALL of October has the To date set to 11/01/2020 to ensure that items from 10/31/2020 are included.

Figure 62. Print Audit Trail Report screen

When you print or preview the report, the successful scans will show.

Audit Trail Report

Centertown Offices
Wednesday, December 16, 2020, 11:31 AM

User	Date Item	Time	Location	Description Chart/Billing
SYSTEM	10/27/2020 Lists-Patients-OCR	08:35:55 AM	Patients	OCR Get Card Successful 0000000100
SYSTEM	10/27/2020 Lists-Patients-OCR	09:10:32 AM	Patients	OCR Get Card Successful 0000000100
SYSTEM	10/27/2020 Lists-Patients-OCR	09:12:47 AM	Patients	OCR Get Card Successful 0000000100

Figure 63. Audit Trail report

New CURES Act Patient Demographics report

As a non-certified product produced by a developer of certified health IT, Lytec is complying with the Information Blocking requirements of the 21st Century CURES Act by the compliance date of April 5, 2021 with a new report: CURES Patient Demographics.

Under the CURES Act, practices may not restrict access, exchange, or use of electronic health information (EHI).

To comply with the Information Blocking requirements the user/practice must be able to export/report certain required information in a format to be used by the requesting patient. The export/report does not have to include all elements in one export/report but can be comprised of multiple exports/reports.

For additional information on USCDI Data Elements and Data Classes refer to the following website, which is updated to July 2020:

https://www.healthit.gov/isa/sites/isa/files/2020-10/USCDI-Version-1-July-2020-Errata-Final_0.pdf

Frequent updates may be issued, so be sure to look beyond this link for the most current information.

To comply with the Provenance element, the export/report must include a date and time stamp of the entity or facility producing the export/report as the source of information.

New report

There is a new report available under Custom Reports > Print Custom Report from the Schedule > Print > Print Custom Appointment reports. In the Custom Reports folder, there is CURES Act Patient Demographic Report.

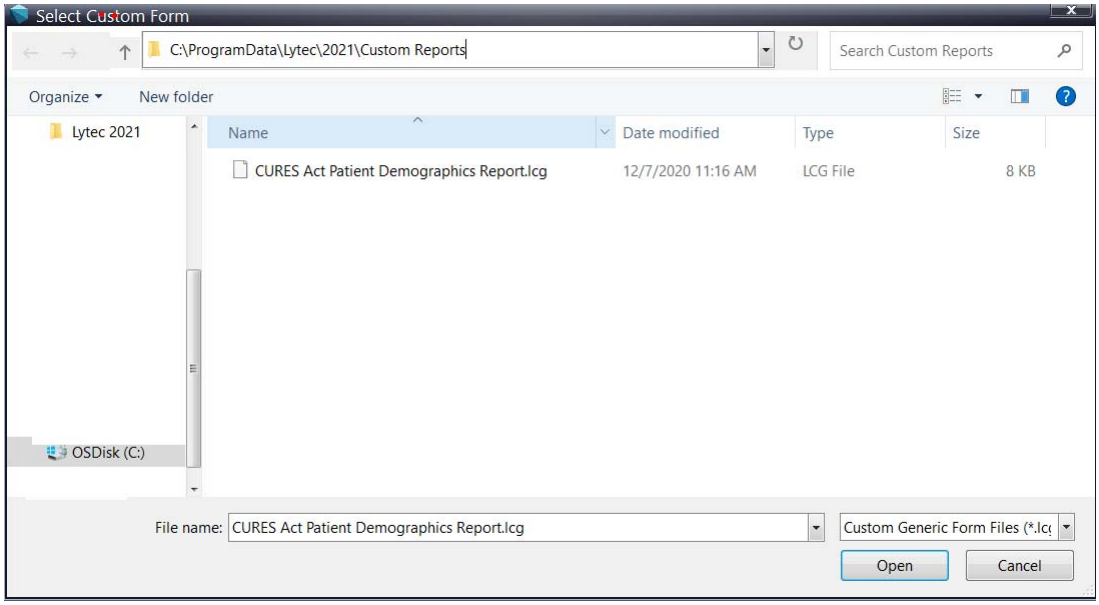


Figure 64. Custom Reports Folder

Highlight the report and click the Open button. The Print Custom Report screen opens. Here, you can select options for printing or previewing the report.

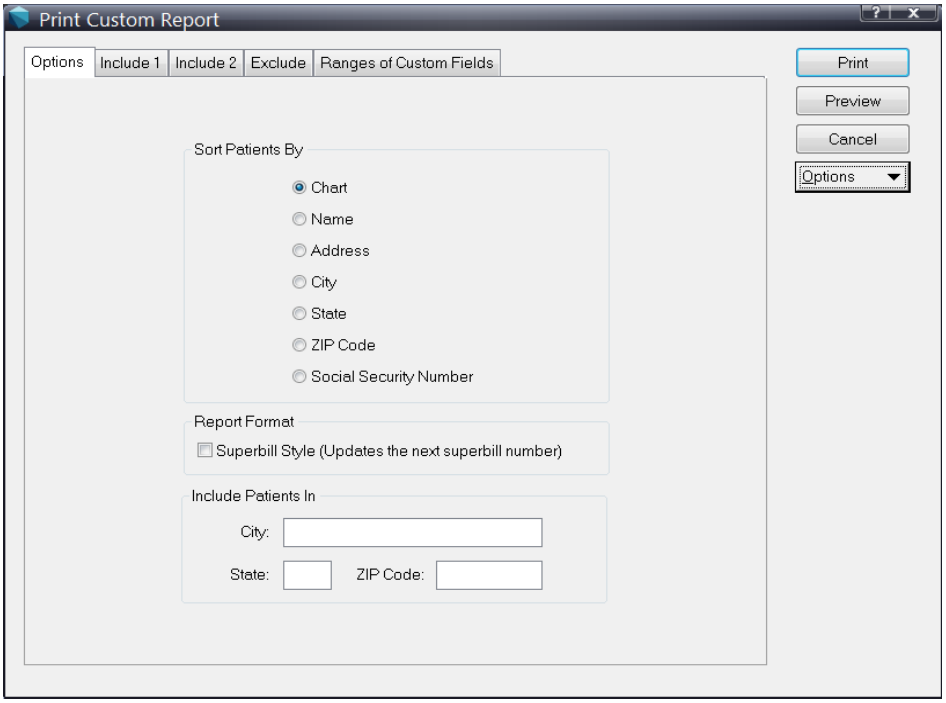
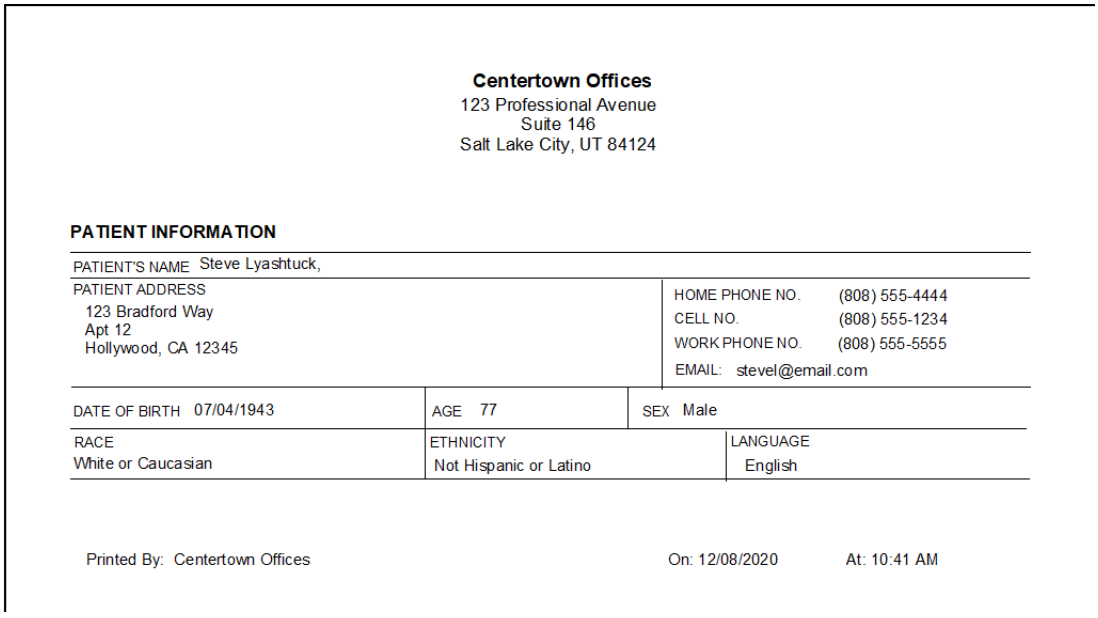


Figure 65. Print Custom Report screen

When you have set your options, click the Print or Preview button. The report opens.



Centertown Offices
123 Professional Avenue
Suite 146
Salt Lake City, UT 84124

PATIENT INFORMATION

PATIENT'S NAME Steve Lyashtuck,		
PATIENT ADDRESS 123 Bradford Way Apt 12 Hollywood, CA 12345		HOME PHONE NO. (808) 555-4444 CELL NO. (808) 555-1234 WORK PHONE NO. (808) 555-5555 EMAIL: stevel@email.com
DATE OF BIRTH 07/04/1943	AGE 77	SEX Male
RACE White or Caucasian	ETHNICITY Not Hispanic or Latino	LANGUAGE English

Printed By: Centertown Offices On: 12/08/2020 At: 10:41 AM

Figure 66. CURES Act Patient Demographics report

Chapter 2 - Resolved Issues

The following issues were resolved with Lytec 2021.

PBI	Application	Description
203784	Pending Transactions	You will no longer receive errors when multiple users are using Pending Transactions and selecting different patients. If multiple instances of the Pending Transactions window are opened by multiple users, eMDs recommends that you divide the list of pending transactions between users to avoid the potential of the same patient being selected by multiple users and duplicating entries for that patient. There is no record-locking on a patient basis. Steps to recreate Setup: The patient has a hold code that is set to pop up on new transactions, 1. Each user opens Pending Transactions. 2. The billing on the screen for each user has been saved. 3. Each launches the Find Pending list (from the little paper icon). 4. Each selects a different patient/pending line at the same time. On both users the selected patient correctly populates the Patient Chart in the Pending Transaction screen and the Hold code pops up on the screen. 5. Both users click OK on their respective Hold code pop-ups at the same time. 6. Another Hold code pops up. 7. Verify that neither user receives an error.

203822	Payments	Apply Prepay charges will now clear from the Apply Prepay screen after being applied. Steps to recreate 1. In Lytec, open Charges and Payments. 2. Select a patient and a billing. 3. From the Billing drop-down menu, select Apply Prepay. 4. Select the prepayment and apply the full payment to the billing. 5. Save the billing and close Charges and Payments. 6. Open the billing and click Apply Prepay from the Billing drop-down. 7. Verify that the prepayment no longer appears.
204549	Move Credits	Lytec will no longer freeze when selecting a patient from Move Credit. Steps to recreate 1. In Lytec, on the Billing menu, select Move Credit. 2. In the Patient Chart field, select a patient. 3. In the Move Credit to section, select another patient. 4. Verify that Lytec does not freeze up.
204679	Revenue Management - Eligibility	Implemented a rollback to the database tables in the event a write results in the ID, EDITransactionID, and Batch ID numbers getting out of sync. Steps to recreate None