

DATA TEC, INC.
 WWW.POWERSOFTMD.COM
 (636)256-7401

PowerSoftMD Newsletter

September 2008

EXTRA! EXTRA!

PowerSoftMD's faster, even easier-to-use menu interface has *arrived!*
 Install your enclosed CD today

PowerSoftMD Primary Menu (C:\Copyright Data Tec, Inc. 1994-2008 Ver 07-20-2008)

Menu Help Aids Links Switch Tools

Add-Ed Patients Posting Post-Pay Leverage EMR Misc Clr Forms Reports QForms Sched Clock J-Notes Entrance Exit

PowerSoftMD

In our ongoing effort to improve PowerSoftMD we have created a new, even more user-friendly Primary Menu.

This New Menu is cleaner, quicker and much less crowded than the current menu, but it still retains all the functionality of the previous menu.

You can try out the new menu by using the "Options" button on the bottom left hand side of the Primary Menu, then selecting the Green "New Primary Menu" option.

Additionally, if you resize the new menu and place it where you want it on your screen, then use the top "Tools" drop down and click "Remember Screen Size & Location".

Aids					
Archive	Bank I-	Calc-List	Delivery	Orders	Registration
Color	Exp Board	Inventory	Print	Printout	Recd
Monitor	Lab-Work	Mail	Med-Code	Msg Ltr	Options
Transfer	Transfer of	Print	Relieve	Render	Reschedule
Supplier	Transfer	Work-List	www.powersoftmd.com		

(MSTA64BIT) Drive E:
 Printed: 7/21/2008 1:40:39 PM

HAI C
 SUPER MFD NEW
www.powersoftmd.com

ENHANCEMENTS

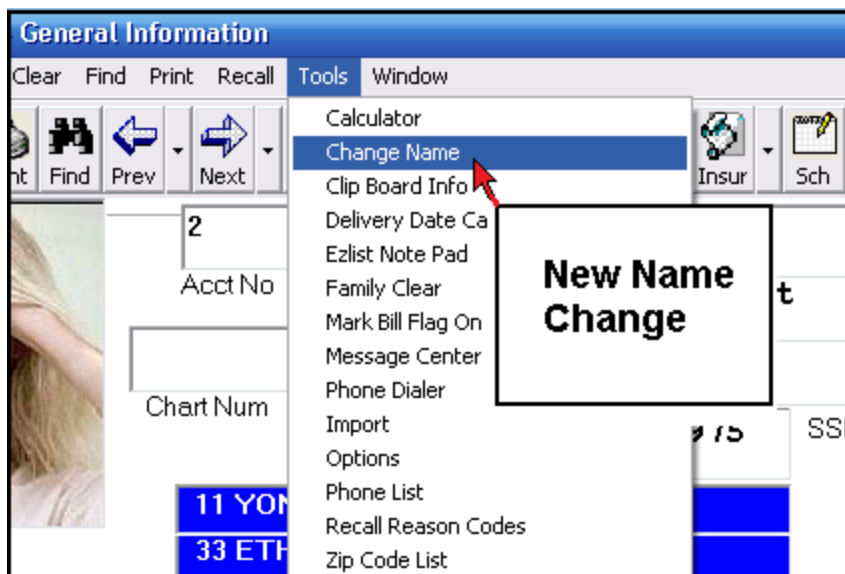
Search Transactions for Payments, in addition to Charges and Adjustments!

A new feature on the Transaction Search Report allows you to search for payments and even specify the type of payment and/or dollar amount!

Search for Payments

All Types
 Charge Card
 Insurance Checks
 Other
 Optional Amt
 Cash Only
 Per Checks
 Electronic Transfers
 None
25.86

New feature on the Transaction Search to let you search for payments in addition to Charges, Adjustments, and Diagnosis.



“Change Names” Easier

In addition to changing patients' names from the Primary Menu you can now change the names from the General Screen. Just use the top “Tools” option, then “Change Name”.

Check it out, it's a lot easier.

The enclosed CD includes many updates, please read the following pages for a quick overview.

Use the new Primary Menu light bulb Icon  to view the list of latest updates that are available from our web site. www.powersoftmd.com

ENHANCEMENTS

The screenshot shows a medical software interface with a 'General Information' window. A dropdown menu is open, highlighting 'Employer of Patient'. A new window titled '4 MED Employer: Acct# 00002 HAMMOND KELLIE' is overlaid, containing the following fields:

Num	2	Data Tec Corp	636 256-7401
Address	Po Box 31576		Work Telephone
City	Des Peres	State	MO
		Zip Code	63131

Buttons: Save (red), Employer Look Up (green), Cancel (grey), Save/Exit (blue).

There is a new window you can use to enter a patient's employer, even if it is not the employer of the insured. To enter this screen, go to the General Screen, then use the top toolbar "Window" option, and select "Employer of Patient." You can also enter this screen right when you add a patient from the full "Add Patient" screen, using the same top "Window" option.

You can also conveniently create a file of common employers by using the "Employer Look Up" button. If this screen is filled in and you print a Patient Information form, then this employer information is used. If it is blank, the employer from the Primary Insurance screen is used.

Primary Menu

There is a brand new, easier-to-use Primary Menu you can activate. From the Primary Menu, move the mouse to the lower left-hand side of the screen and use the "Options" button. Mark the Green option called "New Primary Menu Format". Try it for a while, it is simpler and easier to navigate.

If you are using the New Primary Menu format, you can size the menu and place it anywhere you want on the screen. Then, pick the "Tools" option "Remember Screen Size & Location", and each time you open the Primary Menu it will be the size and location you set.

On the Primary Menu, there is a new "Light Bulb" Icon you can click to either review the enhancements history, or the latest enhancements available with the Internet update, or request a new enhancement.

For OB/GYN doctors, the Delivery Calculator has much improved. You can use it from the Primary Menu, by selecting the "Look Ups and Aids" option or from the SOAP note screen by selecting the "Tools" list.

There is a new Body Mass Index and Body Fat Calculator available from the Primary Menu. In the Look Ups and Aids boxes on the lower left-hand corner of the screen, select the "Med Calc" button. You can also use the top toolbar "Lookups and Aids" option, and then select the "Body Mass Index Calculator".

There is a new Common Documents Library feature available. From the Primary Menu select the top toolbar "Doc Library" option, then use the "Help" toolbar option to learn how to use it.

General Information Screen

In addition to using the "Change Name" option on the Primary Menu, you can now change a patient's name from their General screen by using the top "Tools" option then "Change Name".

There is a new "Patient Employer" window available where you can document the patient's employer. You might wish to do this if their employer is different than the insured's employer, on the Insurance Coverage screen. From the General screen select the top Window option, then "Employer of Patient". This is also available from the Full Patient Add screen, once you have created the patient's account.

When using the Employer Search window on either the Patient's Insurance screen or the Full Add Patient screen, if you can't find the employer, you can use the "Update Employer" button to update the employer list.

The Pay Plan window from the Patient's General screen has improved to allow different Payment Plan Formats. Just use the Form Number field. Another improvement is the pop-up calendar for entering dates.

If the Referral Required Field is checked on the patient's General screen, a Blinking "Referral Required" field will be displayed on the patient's Insurance Coverage screens.

When using the Full Patient Add screen, after a patient is successfully added, a green button labeled "Scan ID Cards" will be displayed in the upper left hand corner of the screen. You can then click it to open the "ID Cards" window for the new patient and scan their ID and Insurance Cards, etc.

There is a new Patient Window that allows you to store Charge Card information for a patient. From the General screen, select toolbar Window, then Charge Card Info. You can create a Password to limit access from the Advanced Utility Menu, Define Users option, then Tools in the upper left-hand corner. The stored information is automatically encrypted when stored.

Posting

On the Payments Posting screen, if the patient has any ledger notes a "Led Notes" label will flash in the upper right hand corner of the screen. You may click it to open the Ledger Notes window.

On the Posting screen, if you fill in a Diagnosis Code that is not in your Diagnosis Code list, you will get an error message and not be able to complete the posting. You can disable this edit by using the "Tools" option, then "Options Setup", but we recommend you don't disable it.

Billing

If you are using the Newest Patient Billing Option, CPT Code with Aging based on Last Insurance payment, there is a new option you will love. You should check the option called "Show Paid Charges if Charge for the same DOS is marked BILL". This way the patient can see items that have been paid for, thus seeing what their CO-Pay went to.

When printing a Patient Receipt, all activity for the Specified Date of Service (DOS) is printed, even if it was posted on different dates.

Insurance

If a patient has Co-Pay filled out on their Primary Insurance screen, the Co-Pay field will flash on the Post Payments screen.

You can set up different TaxIDs for Doctors by Carrier, if needed. On the Carrier Definition Screen use the new Green "TaxIDs" button. Naturally, you should be super careful if using this feature. The Carrier Specific TaxID for the Doctor will override the TaxID found on the Company Name file.

UB04 forms are now supported for both paper and electronic claims.

On the Patient's Insurance screen, there is a new Top "Tools" option, "Clear Fields". This can be used to clear all the fields, typically after the previous carrier has been archived.

When printing Insurance Claims, you can specify different Paper Bins or Trays. You can specify to use the Printer's Default Upper, Middle, or Lower Bin. For this option to work you will need to contact Data Tec and have us walk you through specific settings for your printer.

Electronic Claims

During Posting, if someone has the Electronic Claims Screen open and the patient's account number cannot be added to the screen, it is automatically logged. You can read the log file from the Electronic Claims screen by using the new top toolbar "Posting Log" option. Remember, you should always use the NonSub button to fill in as many account numbers as possible.

If you are sending Secondary Carrier address information with your electronic claims, there is a new option you can set on individual carriers to eliminate sending their information when they are the secondary carrier. From the Insurance Carriers screen, you would select the top "Secondary Ins Info" option, then check "Check to eliminate sending secondary information for this carrier".

Forms

When printing Work Tickets, there is a new option to print schedule "Notes" on the bottom of the work ticket.

When printing "Work Tickets," there is a new option you can check to print the patient's Social Security Number on the bottom of the Work Ticket.

When Printing "Work Tickets" you can specify a new option to print the schedule column heading on the work ticket instead of the doctor number. Check "Print Schedule Column Heading as Doctor #"

When using the Forms Menu "Elec Resubmit by DOS" option, the date ranges for each account is checked to ensure they don't exceed a range of dates more than 90 days.

When printing work tickets, if you have a comment associated with the appointment date on the patient's Appointments Window, the comment will print.

The Forms Menu option "Batch Lab Requests" has been improved.

- It has the option to print on Quest Lab Sheets for OB/GYN practices
- You can use a new "Print Label" button to print a label for the last selected patient. This uses a Dymo-type label printer.

Labeling - When designing a Label Template for printing single labels, there is a new symbol &sysdate you can use to insert the computer's date.

Reports

The Transaction Search report from the Reports Menu now has the capability to search for payments, in addition to Charges and Adjustments.

The Patient Search by Criteria report has a new criteria, the "Type of Patient". If you use this, it matches the "Type of Patient" field in the upper right-hand corner of the Patient's General screen.

Monthly Reports - There is a new option for the Yearly Analysis to specify to automatically print a separate analysis by each separate Insurance Carrier Group Name. On the Insurance Carrier definitions you can specify a Group Name or "Reporting Category".

Monthly Reports - Transaction Analysis automatically shows activity of the top 50 Insurance Carriers.

Scheduling

From the Schedule screen, you can use a new option to export schedule patient appointments into a "CSV" file, which is suitable to be imported into Outlook or Excel. Select the top "Tools" option, then "Export", and then "CSV file for Outlook/Excel".

When you cancel an appointment, the cancellation log now captures the 4-character service code associated with the canceled appointment. In turn, the cancellation report lists this appointment code. In addition, the cancellation report allows you to enter the 4-character appointment code to filter the report based on the code. This way you can zero in on specific types of appointments by code and double-check that the patients were re-appointed, etc.

Tighter Security for Scheduling "Utility Options Menu" and "Fill from Model Day(s)" options. When you try to access these options, you will be prompted to call Data Tec for a "Special" password. However, you can set a special User ID option for specific users to skip this added password security. From the Advanced Utility Menu, under "Define User Security", you can set the option "Access Schedule Utility Menu Without Special Password".

When you click on a patient name entry on the schedule, the pop-up window has new options to make it easier to bring up other patient windows without having to use the top toolbar "Window" option.

When using the Patient Name Search on the Scheduling screen, if you place the mouse over the yellow future appointment or gray past appointment, the pop-up help display will show the entire appointment comment.

When using the Patient Name search window in scheduling, up to 12 of the patients last (previous) appointments will be listed to the right of the screen.

When adding new patients from the Schedule using the "New Patient Real" option, you can add their Email Address.

On the Schedule Name search if a patient has any Immediate Notes they will automatically be displayed and slowly flash.

On the scheduling screen, it's easier to export the automated calling list for both JulySoft and Teltrax. You can simply use the top toolbar "Tools" option, then "Export Automated Call List" and pick the interface you use.

Time Clock

Employee Time Clock Report - there is a new option you can click to show the Totals in Hours and Minutes, in addition to Decimal.

The Time Clock Report has a new option panel to limit the report to Vacation, Sick Leave, or Holiday entries only.

Back Up

Auto Back Up

There is a new Back-Up program called "AutoBack.exe". It's designed to let you easily have multiple back-ups on the new external, large hard drives such as the 500 GB USB or Firewire models.

You may use Windows to schedule this program to run and it will create a separate folder for each day of the week on the target drive and copy your \EZW server folder, sub-folders, and files to it. Depending on the day of the week, it will create \EZWBK\MON\, \EZWBK\TUE\, \EZWBK\WED\, and so forth. The first time you run it, you will need to select from a drop-down list of available drives to specify what drive the back-up folders are to be created on.

By Default, each time it is launched, it will only back up files that have changed according to the Target Day back-up folder. The first time it runs for each day of the week, it will take a long, long time to back up. We suggest running it overnight. Afterwards, each back should run much faster.

There is a option you can check so that it backs up all the files all the time, regardless of whether they have changed: the "Don't use /D" option. We normally DO NOT RECOMMEND using this option.

You can launch this program from C:\EZW\MED\PGMS\Autoexec.exe

The EZHome program has improved, making it easier to restore back-ups to your home computer, requiring less user intervention.

The Primary Menu Back-Up function has improved. The FreeByte Restore button is easier to use, requiring less user intervention.

The "Back Up" option from the Primary Menu has a new option to use FreeByte but only back up data folders. It might run a little faster...

EMR

On the SOAP Note screen, there is a new option you can check on the "Objective Pop Up" window. "Don't Sort Categories" will keep the window's categories listed in the same order you create them, instead of alphabetic order.

When opening a New Visit SOAP Note, if you select a date from the calendar that is not today's date, you will be given a warning and asked if it's really correct.

SOAP Note Templates now have a field to supply the SOAP Note Title.

On the EMR Documents Folder, you can set an option to eliminate the "Time of Day" as part of the automatic document name. Use the "Tools" option on the Documents folder, then check the option called "Eliminate Time Of Day from Scanned Document File Name Prefix". Be aware that this works best if you are only scanning in one document per day into your folders. If you plan on scanning multiple documents into a patient's documents folder during one day, then we recommend that you leave the "Time of Day" as part of the file name.

A Direct Link to Epocrates web site is on both our Script writer and the EMR SOAP Notes Plan - Medications windows. There is a window on the lower-right of the Script Writer Screen to Convert Lbs to Kilos.

The SOAP Note screen has a new large "Magnifying Glass" Icon button on the right that lets you quickly view your entire note.

The SOAP Note screen has a large "New" top icon labeled. This will open a new visit record with the calendar directly below it.

The SOAP Note Body Macro and the Assessment Window button panels indicate a button with lower level buttons in a light blue color.

On the SOAP note screen, when you use the top Toolbar "CopyNote" option to copy a previous note, a screen pops up, letting you select to copy it all, or just which portion of the note you want: Chief Complaints, HPI Text, Exam, and/or Assessment/Plan.

When using the "Medications" tab to prescribe meds in the SOAP Note Plan Window, if the patient has Allergies, automatically an Allergy display window will open up when you click the "Mediations" tab. If you don't like this, you can use the "Tools" option, then "Options Setup" to disable this feature.

The EMR Documents folder now supports up to 27 sub-folders categories, up from 18. If you need to add sub-folders, contact Data Tec for specific instructions.

There is a new EMR Report that allows you to search which patients have documents in their documents subfolders. You can also do the search by date range.

The EMR Patient Overview screen has a new print icon allowing you to easily print the cover sheet information or direct it to a fax driver.

Clients with EMR Only Licenses now have access a limited number of options from the FORMS Menu.

When creating Educational Note Templates for the SOAP Note screen, there is a new edit feature available: the darker green "Windows Editor" button. This will let you edit or revise your Education Note Templates with your default Windows Editor, such as Microsoft Word, etc.

From the SOAP Notes, if you click on the Patient's Last Name field you will be prompted to find a patient by name, just like clicking the Binoculars Icon.

Message Center

Immediate notes window will be automatically displayed; you can also create an Immediate Note by using the Tools option then Immediate Notes.

There is a new Magnifying Glass Icon to let you search all open Message Center Notes to find out whose mailbox a patient's note is in. If you do the search without supplying any part of a name, all the patient messages will be listed.

When on an open message for a patient, you can click the Green "Patient Info Display" button and have direct access to lots of information, including buttons for Overview, Soap Notes, Mini Documents, etc. Try it; you will like it.

When using the Message Center and creating a prescription, the Allergies windows now automatically flashes if any allergies are current listed on the patient's EMR.

You can set a special Login UserID Password of "NONE". This will allow you to create a UserID for extra shared Message Center Mail Boxes that everyone can switch to without entering a password. To create the Mail Box, you must Login as the special User at least once and open the Message Center.

You can now activate the Message Center directly from a patient's General screen using either the Ctrl M keys or the toolbar Tools, then Message Center option. You can set an option with the Newer Script Writer to indicate that you don't have to be prompted for a User-ID and Password before printing the script. For obvious security reasons, we don't recommend this option, but some users wanted it. Once on the

Script Writer screen, use "Tools" then "Options Setup". You will be prompted to enter a Special Password, you will need to call Data Tec for the password. This way we can verify you understand what you are changing.

Miscellaneous

When using our editor to create Quick Form letters once you can click on the Symbols button, then click on a symbol to insert the symbol into your form, where ever the cursor is.

From the SOAP Notes, you can activate a new option to automatically fill in Vital Signs when you start a new note (if vital signs were recorded for the specific date). From the toolbar pick "Tools" then "Options Setup". Check the option "Auto Fill in Vital Signs for New SOAP Notes".

When updating the Lab Tracking List from the Primary Menu, you will automatically be prompted to create a message center note. You can disable the launching of the Message Center by using the new Tools option, then select "Options", and Un-Check the "Automatic Message Center" option.

Lab Tracking now has the ability to easily import lab result files, in addition to scanning them in.

Lab Tracking has now has a Print button to let you create and print the lab tracking list contents.

On the "Pharmacy File Update" screen, there is a new top "Print" option to let you print a Phone List, including Fax Numbers.