DATA TEC
POWERSOFTMD

December 2016 Newsflash

~~12 Days~~ 14 Enhancements of Christmas

1. There is a new option from the full-screen "Add Patient" that lets you import basic patient Demographics from CSV files. Learn more at:
www.powersoftmd.com/technote/ImportPatientDemographicsCSV.pdf

2. There is a new Management Report called "**Credit Balance Line Item Research Report**". This is available from the Management Reports Menu. This report can be run over any range of dates reporting any ledger line items that have a credit total (overpayment).
**Notes:**
a) Only Accounts where the overall Account Balance is Negative are considered.
b) If the Credit Account has no items showing a credit total, the account will be skipped.
c) The totals for this report will not necessarily match any other report, based on the correctness and completeness of your ledger postings.

3. When printing *Appointment Slips* there is a new option called
"**Print on Left Side of Paper Only**". This can be used if you want to cut your 8 ½ by 11 inch paper sheets down the middle vertically, creating two 4 ¼ by 11-inch sheets to use in your printer. The patient can then have a smaller piece of paper to take with them.

4. New features on the Non-Browse type Schedule:
- The **Computers Time** is displayed in the top right side of the screen.
- There is a new button called "**Left Msg**" when you click on a Patient's Appointment. This indicates that you did not confirm the appointment, but you were able to leave a message.
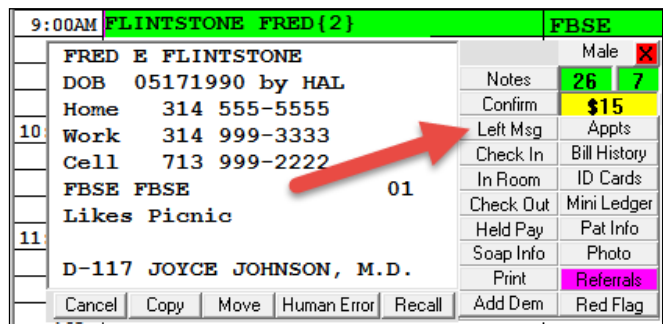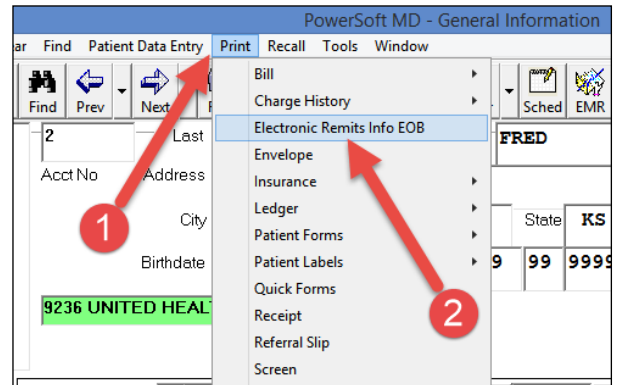

5. There is a new Management Report called "Accts Receivable Calculated"
The report will list daily accounts receivable for any date range, listing the total Debits, Credits, and Total Accounts Receivable for each day transactions were posted.

6. The Reports Menu, Credit Balance Report, has a new option to sort the report by "**Last Visit Date**"

7. A new Monthly Report will let you see statistics for paid charges that have been assigned to Categories. From the Monthly Reports Menu, select the checkbox labeled "**Paid Charges by Category**". You will also have to place Categories on the CHG Codes in your base CHG Fee Schedule.

8. The Daily Schedule Cross Reference Report now lists the **Schedule** and **Column Numbers** for any of the scheduled patients. This should indicate to the Provider that the Patient was scheduled to be seen.

9. The report "Patient Search by Criteria" has two new criteria:
   - **Collection Agency Flag**
   - **Referral Required Flag**

10. On the Daily Schedule Cross Reference Report, you can set a new option to only list patients that had nothing posted or were posted but not scheduled. Just select the new option "**Only No**"

11. You can create an **Excel-type CSV Export** file suitable for a **collection agency**.
   a) Select the patients by checking the Collection Agency field on the patient's **General screen**. It's the **second field** under the "**Collect**" to the right. It will turn blue when checked.
   b) From the **Forms Menu**, select the **Billing Statements** option and then select **#6** the "**Create Export File for Collection Agency**" option.

12. There is a new report on the **Monthly Reports** Menu labeled "**Payment Details/Totals Report**". This lets you report payment information for any Range of **Posting Dates** and also specify any Range of **Dates of Service**. You Can also specify the **Types of Payments** you wish to list.

13. The Schedule, Tools option, Export option, "**CSV Appointment Reminder File for Common Interfaces**" has a new column added to the export file, the appointments **Service Code**.
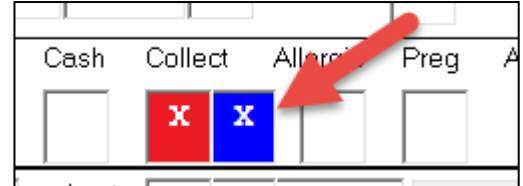
14. A new report displays and even prints patients' Electronic Remittance Information. From the **General Screen**, select the top toolbar "**Print**" option, then select "**Electronic Remits Info EOB**". On the report screen, select your **Date Range** and click the "**Run**" button.

Thank you for your continued support and Great Ideas.
We wish you a *Wonderful Holiday Season*!
Cordially,

Hal Goodall &

All your PowerSoftMD Staff ☺