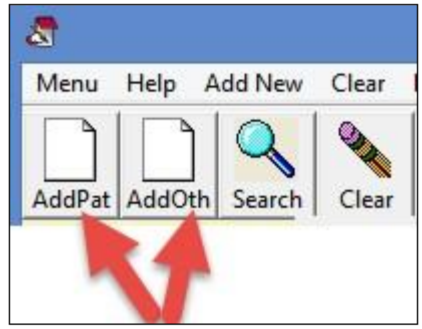
PowerSoftMD Enhancements 2016

12-21-2016
0039 On the SOAP Note **eSuperBill** screen the units field has been expanded from **2** digits to **3** digits

12-18-2016
0038 The Message Center now has 2 separate buttons to add new messages; "**AddPat**" to add a message for a new patient and "**AddOth**" to add a message for a non-patient. This eliminates an extra selection step. You will need to resize your Message Center screen and then use the "Tools" option "**Save Screen Size and Location**" to readjust where and how the screen is displayed.



0037 There is a new Schedule export that can be used with the Klara Secure Patient Messaging Platform. From the Schedule screen select "Tools", "Export" and then "CSV Klara Message System". You can also find out more information from:
www.powersoftmd.com/technote/KlaraExport.pdf

11-26-2016
0036 There is a new option from the full screen Patient Add that lets you import basic patient Demographics from CSV files. Learn more at:
www.powersoftmd.com/technote/ImportPatientDemographicsCSV.pdf

11-04-2016
0035 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 ran over any range of dates reporting any ledger line items that have a credit total (overpayment).

Notes:

1) Only Accounts where the overall Account Balance is Negative are considered.
2) If the Credit Account has no line items showing a credit total the account will be skipped. **3)** Therefore, the totals for this report will not necessarily match any other report, based on the correctness and completeness of your ledger postings.

11-03-2016
0034 When printing *Appointment Slips* there is a new option you can clicked 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 inches sheets to use in your printer. This way the patient can have a smaller piece of paper to take with them.

10-18-2016
0033 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 Patients Appointment. This indicates that you did not confirm the appointment, but you were able to leave a message for them.

09-27-2017

0032 There is a new Management Report Available, 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.

09-26-2017

0031 The Reports Menu, Credit Balance Report, has a new option to sort the report by "**Last Visit Date**"

08-29-2016

0030 The is a new Monthly Report available that will let you see statistics for paid charges That have been assigned to Categories. From the Monthly Reports Menu select the Check box labeled "**Paid Charges by Category**". You will also have to place Categories on the CHG Codes in your base CHG Fee Schedule.

07-29-2016

0029 The Daily Schedule Cross Reference Report now list the **Schedule** and **Column Numbers** for any of the scheduled patients. This should indicate the Provider that was the Patient was scheduled to see.

07-28-2016

0028 The report "Patient Search by Criteria" has two new criteria:
- **Collection Agency Flag**
- **Referral Required Flag**

07-26-2016

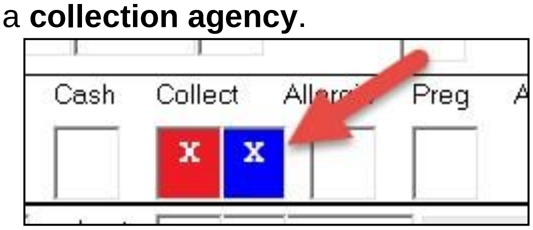
0027 On the Daily Schedule Cross Reference Report you can set a new option to only list Patients that had nothing posting or where posted and Not Scheduled. Just select the new option "**Only No**".

07-17-2016

0026 You can create an **Excel type CSV Export** file suitable for a **collection agency**.

1) 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.

2) From the **Forms Menu**, select the **Billing Statements** option and then select **#6** the "**Create Export File for Collection Agency**" option.



07-15-2016

0025 There a new report on the **Monthly Reports** Menu you can run labeled "**Payment Details/Totals Report**". This lets you report payment information for any

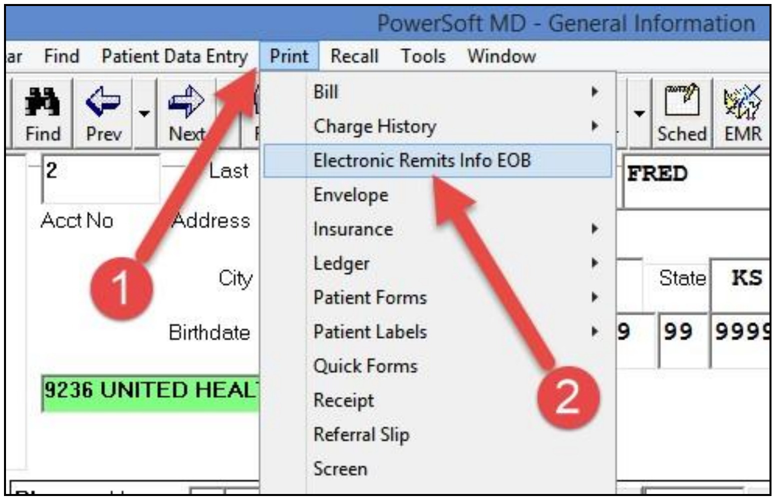
Range of **Posting Dates** also specifying any Range of **Dates of Service**. You also specify the specific **Types of Payments** you wish to listed.

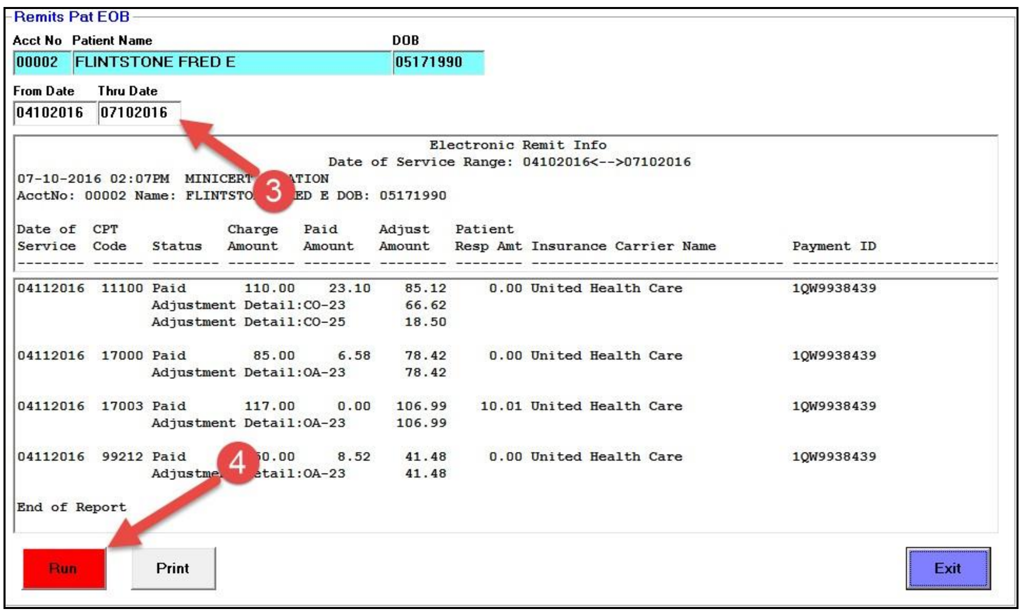
07-12-2016

0024 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**.

07-10-2016

0023 There is a new report to display patients Electronic Remittance Information and/or print it. from the **General Screen** select the top toolbar "**Print**" option, then select "**Electronic Remits Info EOB**". Once on the report screen select your **Date Range** and click the "**Run**" button.





07-08-2016

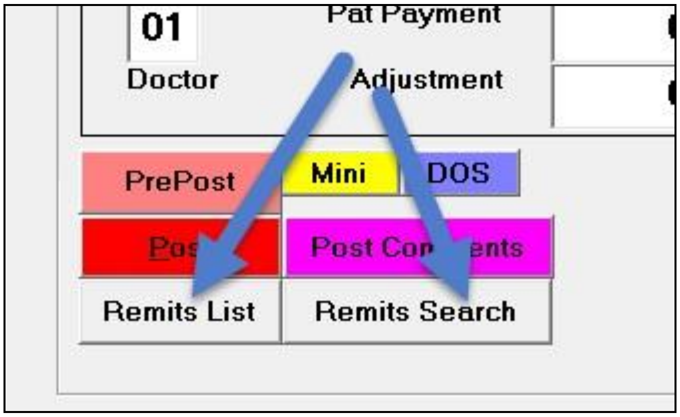
0022 There is a new report from the Reports Menu, “**Imported Ins Remits**”. This let you list summary and detail info regarding the Insurance Claim Electronic Remittance files you have imported. This may be used as a tool to cross reference your daily posting reports.

07-01-2016

0021 There is a new **Apex Sec** Forms Menu option for submitting **Apex EDI Secondary Claims**. It lets you submit claims to Apex EDI automatically switching the Primary and Secondary information on the claims. You will still need to use the Apex EDI screens to enter some details such as what the primary paid. You can also set your payment posting screen to prompt you to add the claims to Secondary screen when you post the Primary payment. Find complete details at: www.powersoftmd.com/technote/ApexEDISecondaryClaims.pdf

0020 On the **Payment Posting** screen there are two new buttons to let you easily find Electronic Remits that you have imported.

- The "**Remits List**" button let you find and select patients you have import remits for.
- The "**Remits Search**" button lets you find all the remit files imported for the current patient.



05-29-2016

0019 There is a new feature that lets you easily **encrypt files** creating a zip file suitable for emailing. From the Primary Menu select the "***Encrypt***" button. Once on the Encryption screen you can use the top toolbar "**Help Video**" option to learn how to use the Encryption feature.

05-25-2016

0018 There is a new option you can activate on the General Information screen that allows you to specify a Residential Care or Nursing Home Facility with for a patient.

1) Use the ***Utility Menu*** and select the "***Facility (Residential Care)***" option and add the address of the Facilities. Note you will also need to add the NPI number associated with them in the field labeled "***NPI Box 32a***".

2) On the General Information screen select the top toolbar "***Tools***" option and click "***Options***", finally check the option called "***Display Facility Field to indicate where patient resides***". 3) On the General Info screen click on the "***Facility Field***" (under the SSN Field) and select the patients residential facility.

4) If you use this option and post a place of service "**POS**" type of **13** then the Facility you selected will be filled in Box 32a on your HCFA 1500 Insurance claims.

5) If you use this option and post a place of service "**POS**" type **12** and provide a Facility the Facility will be used for Box 32a, otherwise the patient's address will be used.

05-11-2016

0018 The New Time Clock has a new button "***Group Time Entry***" that lets you add Holiday Times for several Employees at once or Vacation Days much easier.

0017 The new Apex EDI Electronic Claims batch submit screen has a new button "***Skip List***". You can use this button to specify specific carriers to temporarily not submit.

05-09-2016

0016 There are 2 new features to make filling in the Electronic Payer-ID for Insurance Carriers much easier.

- On the Insurance Carrier Screen from the Utilities Menu, there is a new button called "***Payer-ID***" on the bottom right side of the screen. You can use this button to display the ***Payer-ID Search and Update Window***. You can still fill in the Payer-ID field manually.
- From the Reports Menu, select Insurance Tracking, then select Insurance Carrier Payment Totals Analysis. When you run the report it will list a new column Payer-ID. You can click on any Carrier listed on the report and display the ***Payer-ID Search and Update Window***.

04-25-2016

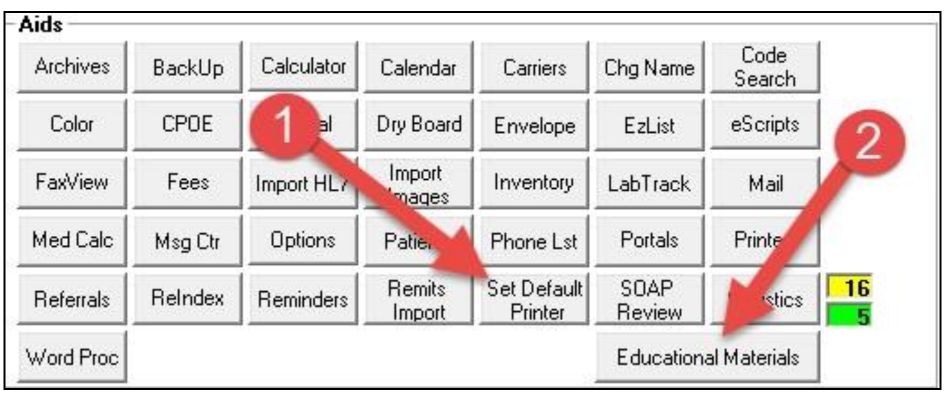
0015 When printing ***Work Ticket Batches*** if you printing them for a future date, the patient's age on the work ticket will be based on the appointment date, not the current date.

04-15-2016

0014 When entering EMR Vital Signs, if a patient's ***height*** has been previously entered, it will automatically populate the ***height fields*** with the last values entered. Naturally, you can overwrite or clear the fields if needed.

04-12-2016

0013 The *Primary Menu* has two new buttons:
- *Set Default Printer* used to easy see and set the Default Windows Printer
- *Educational Materials* used to access the Online Medline Plus Education website

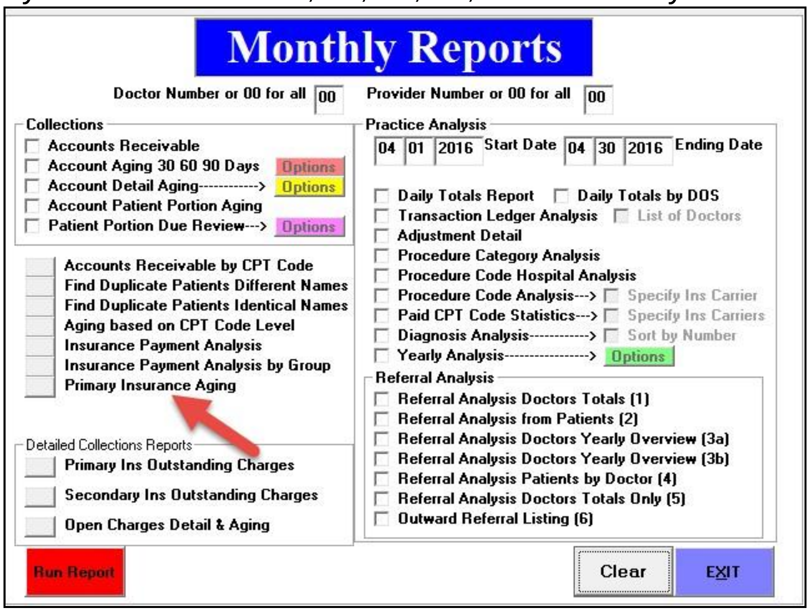


04-11-2016

0012 If you don't post charges to ledgers, but do use the EMR SOAP Note coding options there is a new report option you might like to try. The option can export a CSV file with PQRS type Information similar to the Forms Menu "*Export PQRS CSV File*" option. To use this new report option select "EMR Reports" from the Reports Menu, then select report #1, "*SOAP Note Procedures*", check the new option called "*Export PQRS Info to File*", and then run the report.

04-08-2016

0011 There is a new “Primary Insurance Aging” report available from the Monthly Reports Menu. It shows aging by Carrier for Current, 30, 60, 90, and 120+ Days.

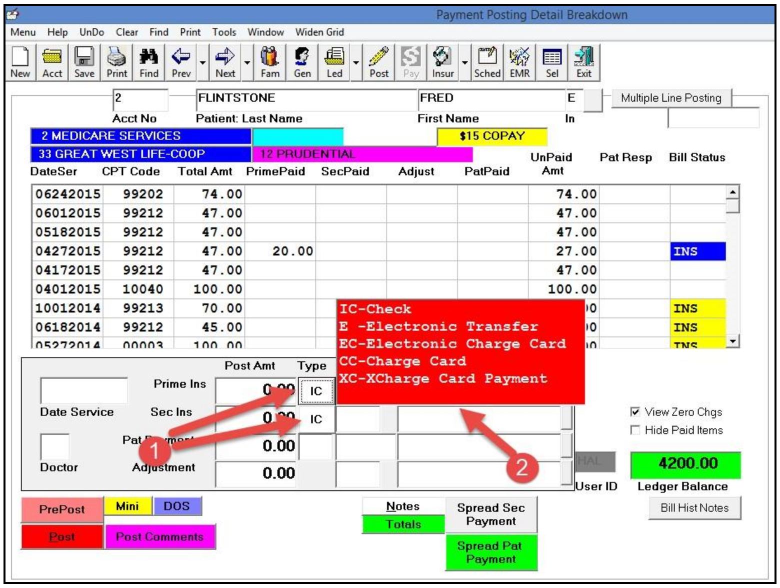


03-29-2016

0010 The Billing History Reports from the Reports menu have a new option you can select, “Only Show Flagged Accounts”. This will limit the report to only showing patients that have been billed for the same amount the last 3 statements and haven’t made any payment. The report also shows patients that have never been billed, but have a patient balance.

03-29-2016

0009 When posting Payments there are two new types of Insurance Payment posting options you can use; CC - Charge Card and XC - XCharge Card Payment. Both types will record as an insurance payment, with a special comment of “Charge Card”. This way they will be on the ledger as insurance payments but the daily bank deposit report can still total them as charge card payments.



03-09-2016

0008 On the Message Center screen, you can use the top toolbar "***Tools***" option then select "***Email Service Definition***" to specify what link will be opened when you click on a patient's email address. Note: the email address itself is also placed into the Windows Clipboard.

02-08-2016

0007 The Schedule export for appointments option "***CSV Appointment Reminder File for Common Interfaces",*** has a new option allow you to default to other phone numbers if there are no phone numbers checked on the Patient's General screen. The option is called "***Use Default Hierarchy if None are Marked***".

01-26-2016

0006 The SOAP Note screen has a newer easier to use **Review of Systems** text selection pop up window. On the SOAP Note options screen select ***"(19) Review of Systems New Pop Up List***". Note: You have to set your system to use the Meaningful Use Version of the SOAP Note screen, Data Tec and show you how to do this.

0005 The SOAP Note screen has a newer easier to use "***CopyNote***" feature. On the SOAP Note options screen select ***"(20) Use Latest Copy Note Screen*** ". Note: You have to set your system to use the Meaningful Use Version of the SOAP Note screen, Data Tec and show you how to do this.

01-25-2016

0004 The SOAP Note screen "***Short Cuts***" pop up window has an alphabetic pad you can use to zero in on shortcuts easier. Note: You have to set your system to use the Meaningful Use Version of the SOAP Note screen, Data Tec and show you how to do this.

01-24-2016

0003 The "***Patient Search by Criteria***" report has a new criteria; "***Current Smoker***".

01-16-2016

0002 The ***Quick Forms*** screen has a new forms list on the right hand side allowing you to select & print multiple forms at one time.

0001 The ***Quick Forms*** screen has a new option you can click "***Auto Capitalize Names, etc.***". If you check this the patients name and other address and referring doctor fields will be capitalized as best as possible (instead of defaulting to all caps).