## 12/04/2021

**0030** The Full Add Patient screen has a new option that lets you copy an existing patient's info to make a new patient. Before you add them a second time you could change their last name to denote a new record for the same patient. For example, if you had patient "Jack J. Smith" you could create patient "Jack J. Smith-Z'. On the *Full Add Patient* screen, click the top toolbar "*Copy*" option, then "*Copy Patient Demographics*".

#### 11/18/2021

**0029** A new option has been added to the SOAP Note screen to allow for Doctors, NP's, and PA's to enter and view confidential notes for patients. You will need to activate this option on the user's security definition checking the option "<u>Access Confidential Notes</u>". Once this is set and the Doctor, NP, or PA is logged in, there will be a new button on the bottom left of the SOAP Note screen labeled "<u>Confidential</u>". These notes are not part of the patient's medical record and are stored encrypted for added security. If a patient has any confidential notes, this button will automatically be highlighted.

### 11/14/2021

**0028** A new option has been added to scheduling to let staff enter Vital Signs directly from the schedule without having to open a patient's EMR Profile or SOAP Note screens. Click on the patient's appointment name entry then click the magenta "<u>Add Options</u>" button, then click "<u>Vital Signs</u>".

**0027** The EMR Vital Signs screen have been enhanced to make it easier to enter Metric measurements for Height, Weight, Head Circumference, and Temperature.

#### 11/04/2021

**0026** A new help feature makes our Internet Technical Notes easy to access. From the Primary Menu select the top toolbar "*Help*" option, then select "*Technical Notes*".

#### 10/13/2021

**0025** On the Full Patient Add screen there is a new option you can select to prevent the Insurance CoPay selection window from popping up when adding a patient with Insurance Info. On the "<u>Add Patient</u>" screen, select the "<u>Defaults</u>" button, then check the option labeled "<u>Don't Pop Up CoPay Window</u>".

**0024** On the Post Charges screen as you know when you click on some specific types of Places of Service (POS Field) a Hospital/Referring Doctor Information window pops up. You can now use the Ctrl-H keys to pop up this screen regardless of the POS Code, in addition you can still use the top toolbar "Window" option then "Hospital/Ref Doc Info" option.

## 10/07/2021

**0024** Scheduling: When canceling an appointment, if you use the light red "<u>Leave on Screen Mark as NoShow color Red</u>" button, any service listed on time slot 2 will remain on the screen preceded with "NoShow". Also, if the appointment takes up 3 slots or more the cancelation code number will be included in time slot 3, i.e. "NoShow #3". This works better if you have the schedule set to use "<u>More Characters per Time Slot</u>". You can activate this option by selecting the top toolbar "Utilities", then "Utility Options Menu, then "Set Scheduling Options", and then checking "<u>More Characters per Time Slot</u>".

## 9/28/2021

**0023** When using the Patient's "Additional Demographics" screen, if it comes up in the "Browse" mode, you can simply click on the blinking "Browse" mode label to exit the browse mode. If you don't want it to default to the browse mode you can use the top toolbar "<u>Tools</u>" option, then click the new option labeled "<u>Default Browse Mode off</u>".

**0022** There is a new Advanced Utility option to let you clear or blank out all patient social security numbers on their General screens. Many practices are no longer using social security numbers and to help prevent against identity theft may wish to remove them. From the Advanced Utility Menu you would use the "<u>Global Changes/Flags/Ins</u>" option, then select "<u>Clear All SSN from General screens</u>".

# 9/24/2021

**0021** The Open Charges Report from the Monthly Reports Menu has a new option to add the CPT Code Category onto the transaction detail lines. Select the option labeled "<u>Add Cat Num to Transaction Detail"</u>.

## 7/21/2021

**0020** You can create and store <u>Quick Form</u> letters for a patient in a new special "<u>Private</u>" folder that is not consider part of their medical record and will not be included when you export a patient's EMR information. This could be used for keeping a history of collection letters you send patients, etc.

- To create them, on the Quick Forms screen just check "Store in 'Private' Letters Folder".
- To view them from the "Mini Letters" display screen, check "Access Letters in 'Private' Folder".
- There is also a new option on the "General" screen to open the "Mini Letters" display screen, select the top toolbar "*Window*" option then "*Mini Letters*".

# 7/20/2021

**0019** If you are in an Insurance Contract where they agree to pay you specific amounts for specific procedures; now you can Track if they are paying the amount they agreed to pay.

- 1) Create an Insurance Payment Profile for the specific Carrier.
- From the Utility Menu select, "Ins Payment Profile"
- When prompted enter the Carrier Number
- Fill in the column labeled "Profile Amount" with the contracted amount for each charge (If any procedures are not contracted, just leave their amounts blank).
- 2) Periodically run a report for any date range to see charges that have been paid for and the amounts paid don't match the contracted amounts.
- From the Reports Menu, select Management Reports.
- Select and run the "Ins Payment Profile Comparison" report.

## 6/29/2021

0018 Employee Time Clock enhancements:

- If an employee times in, then within 2 minutes times in again, they will be given a warning to double check it wasn't by accident.
- If an employee forgets to time out from the day before they will be allowed to time out for the previous day without having to supply the time override password (even if one exists).

#### 06/21/2021

**0017** You can now press the F11 key to close the Immediate Notes windows on patient screens. Naturally, you can still use the Exit button or the Red "X" button.

# 06/14/2021

**0016** A new "Patient Search by Criteria" report field is available labeled: "Original Referral Source Type". It lets you find patients based on their General screen "OrgSrc" field contents.

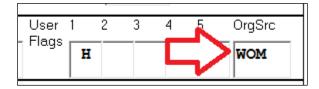
**0015** A new referral report is available that gives you the statistics based on the "OrgSrc" field from the General screen. From the Reports Menu select Monthly Reports then set the date range on the right that you want, next click the Referral Analysis option "Original Source (7)", and then run the Report.

**0014** On the General screen there is a new field you can use to indicate the original source of a new patient. It's labeled "OrgSrc" and can contain a 3-character code. When you click on the field a

window will pop up where you can optionally create a list of the 3-character codes and their descriptions.

Examples: INT - Internet,

WOM – Word of Mouth, GOL – Google, etc.



#### 05/31/2021

**0013** When using Quick Forms, 3 new symbols are available: &firstname &lastname and &midinitial These variables provide the upper and lower case versions of &fname and &lname

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### 05/07/2021

**0012** The <u>Post Charges Screen</u> has a new set of <u>Arrow buttons</u> to the left of the Charge Code Lines. These buttons let you move Charge Lines around easily.

# 05/01/2021

**0011** There is a new Management report to show a log anytime someone used the "<u>Set Alternate Posting Date</u>" feature. From the Management Report Menu select the "<u>Posting Date Reset Log</u>" button.

#### 04/27/2021

**0010** Then Employee Time Clock has been enhanced. Depending on if you are Timing In or Timing Out, the background color of the screen changes and a large label is displayed "<u>Time In</u>" or "<u>Time Out</u>" to make it clearer what action you are performing.

### 04/21/2021

**0009** There is a new report you can run to look for individual charges that might not have been submitted to insurance. From the Reports Menu, select Management Reports, then click the "ElecClaim Submit Audit" button. This only considers claims submitted electronically. If you use the report, we recommend that you contact Data Tec and have us review how to best use and understand this new tool.

**0008** There is a new option on the **Post Dates of Service Info** Screen (the DOS Screen) you can set to eliminate being asked to mark all items as paid when a patient's balance becomes zero or a credit. From the top toolbar "Tools" option select "Options" then you can check labeled: "<u>Check to Disable Mark All Items Paid Prompt</u>". If a balance becomes zero or a credit charges will not be prompted and charges will not be automatically be marked as paid.

**0007** There is a new option in the **Payment Posting Screen** you can set to eliminate being asked to mark all items as paid when a patient's balance becomes zero or a credit. From the top toolbar "Tools" option select "Options" then you can check "*Disable Prompt to Mark All Items Paid with Zero Acct Balance*". If a balance becomes zero or a credit charges will not be prompted and charges will not be automatically be marked as paid.

**0006** There is a new posting option you can set to control if items are marked paid automatically. on the **Posting Charges Screen**, open the top toolbar "Tools" option, then select "Options Setup". You can check the new option "*Don't Mark any Charge Paid that can be sent to insurance*".

If you check this option then even if the amounts paid on the charge make the amount owed to zero or credit, if the charge hasn't been sent to insurance it won't be marked "PAID". This will not affect charges that are marked as "NONE" in the Insurance Print column on the fee schedule, because these items would never be sent to insurance anyway.

#### 03/10/2021

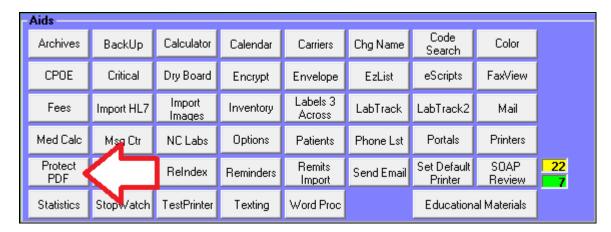
**0005** Three new vital sign values can be entered.

- Weight Length Percentage
- BMI Percentage
- Head Circumference Percentage

### 02/25/2021

**0004** On the Payments Posting screen when posting insurance payments, if you use one of the "<u>Select Remits</u>" buttons the type of insurance payment will automatically be changed to "<u>E</u>" for Electronic Transfer. If you don't like this new feature, you can disable it by selecting the top toolbar "Tools" then "Options", and then checking "Don't Automatically make Payment type "E" for Remits".

**0003** There is a new option on the Primary Menu, <u>Protect PDF</u>, that lets you; encrypt a PDF with any password you want to supply. If you do this before emailing a PDF, be sure NOT to put the password in the email, just call or fax them the password.



### 02/22/2021

**0002** There is a new option from the patient's Insurance screen when you use the <u>Archives</u> button. The option is labeled "<u>Restore Archived Info</u>". If you use this option to resubmit a claim, you will need to use it twice; once to submit the old claim, then a second time to restore the patient's current insurance information.

# 02/12/2021

**0001** A new report is available from the Management Reports menu. It's called "Unique Number of Patients Seen Per Carrier". It gives the number of unique patients that were seen over any period of time per Insurance carrier. For example: a patient seen ten times, counts as one.