PowerSoftMD Enhancements 2024

12/17/2024
When clicking on a patient's name entry in the Schedule, addition information will automatically be displayed:
- Primary, Secondary, and Third Insurance Carrier Names
- Primary and Secondary Co-Pay Dollar Amounts
- Amount of the account balance that is set to be billed to the patient, Patient Balance Due.

12/13/2024
Insurance Claims "*Prior Authorization Number*" field 23 on the HCFA 1500 has been expanded to 30 characters. You can access this field from the patient's Insurance Detail screen or from the Referral Tracking Pop Up screen.

12/09/2024
When using the Twilio "*Text Appt Notices*" option from the schedule you can have different sets of messages to send. Just use the new "*Prefix Set*" option. You could have one message asking the patient to confirm the appointment, and a different message you send on the day of the appointment as an extra reminder.

11/22/2024
If you are using the MU version of the SOAP Note screen you can activate a new option to display the *Patient's Ledger Balance Due* on the top right of the screen. To activate this on the SOAP Note screen use the top toolbar "*Tools*" option, select "*Options*" then check the option "*(23) Display Patient Balance Due from Ledger*" and save and exit.

11/20/2024
On the Patient's Insurance Detail screen when you click the Hospital Number field, the selection list that is displayed shows more information; Hospital/Location Name, NPI, and street address.

11/04/2024
The Twilio Texting window to individually text patients has been enhanced. The Pop-Up list of text lines you can create can contain a special symbol &patbaldue that will insert the current patient's balance due when the text line is selected.

10/18/2024
Electronic Lab Requests from the SOAP Note have been enhanced. When using the "*Lab Library*" button you can select a new option "*Add Multiple Labs to Lab Requests*". This lets you select more than one lab type at a time from your Lab Library list.

The "*Post Payment*" screen has been enhanced:
- You can use the new top toolbar option "*Text*" to text the patient.
- Doctor Number fields are color coded matching the color coding from the Ledger screen.

10/15/2024
The "*Patient Search by Criteria*" report has a new criterion, "*Patient Balance Due*" range.

10/11/2024
When submitting electronic claims using the Forms Menu "*Apex*" options, there is a new option you can set to **automatically see a pop-up list** of any patients that have **last names that include blanks or hyphens**. You can set the from the "*Apex*" submittal screen, select the top toolbar "Tools" then Click to the left of the option labeled "*Display List of Last Names Containing Blanks or Hyphens*". You will have to call Data Tec to get a special password to set this option.

09/17/2024
On the SOAP Note screen, when you display the "*Medications*" window, if you open the "*Details*" or "*Log*" options, a new option is available you can click to arrange the entries displayed showing the newest entries first. Just check the "*Newest Entries First*" option.

09/09/2024
On the SOAP Note screen the right-hand side Magnifier Icon which activates a SOAP Note print screen has a new FontSize field you can use when you print. There is also a second option labeled "Print Duplex" you can check for double sided printing, if you printer supports it.

08/30/2024
You can set a new option for both the *Full Add Patient* screen and the *Small Add Patient* screen to require either a home phone or cell phone must be entered when adding new patients. This can be a helpful if you plan on texting the patient in the future.

08/28/2024
You can indicate that a Charge is not supposed to be sent to Insurance, but it still indicates an office visit and when posted it will update the Visit Dates on the Patient's General Screen.

From the Utility Menu select the "Fee Schedules (CPT)" option. On each specific charge line
You can put the keyword "**NOINS**" in the "*Insurance Print*" column. This will cause it not to be sent to insurance, but when posting the General Screen dates will still be updates.

As before if the keyword "**NONE**" is in this column the Charge will not be sent to insurance and it won't update the visit dates on the General Screen during posting.

08/21/2024
On the SOAP Note screen if you use the top button "Print" a new option "Internal Notes" is available to view and/or print the internal use only notes for a specific SOAP Note.

06/27/2024
On the Patient Insurance screens, if you are adding their insurance carrier and exit the screen without specifying a Relationship Type to the Insured, it will automatically fill in "M" for Myself.

06/26/2024
The "*Patient Search by Criteria*" report has a new option you can use to find patients that have Primary or Secondary Insurance carrier specified but the Relationship field is blank. Just check the option "*Has Ins & Relationship is Blank*".

06/03/2024 The Forms Menu options to print batches of Paper Insurance claims has a new option ("*Number of Seconds to Pause*") you can set to automatically pause from 3 to 60 seconds between printing each claim. This can be used if you have a slow printer environment.

05/10/2024 The Mini Ledger display screen now allows you to view and/or change the transaction Hidden status along with the Doctor number.

04/19/2024 If you mark a patient's general screen status as "*Deceased*" then their screen will automatically be marked as "No Recall", "No Text", and "No Email".

In addition, you will be notified they are "*Deceased*" if you:

- Use their Text Patient window
- Add a Message Center note
- Click on an existing Schedule entry
- Try to schedule a new appointment
- Try to open eScripts

03/05/2024 When printing individual Insurance Claim Forms if you leave the print window open for more than 10 minutes without any activity, it will automatically close.

02/07/2024 Primary Claims Charge Level Analysis report has been enhanced to allow you to limit the report to specific insurance carriers or exclude a list of specific insurance carriers. To run this report from the Reports Menu, select "*Insurance Tracking*", then select "*Overdue Charges based on Ins Billing Status*".

01/26/2024 There is a new User Option you can set to stop the Message Center Number Count on the Primary Menu from Blinking. From the Primary Menu use the "*Options*" button, then check the option labeled "*De-Activate Msg Center # Blinking*". After you save and exit, you may have to restart the Primary Menu to see the desired results.

01/23/2024 The EMR SOAP Note Procedures report has a new option you can check labeled "*Only Show Items Not Posted*". This way you can double check to see if all procedures in SOAP Notes have been posted or not. This is report #1 from the EMR Reports Menu.

01/09/2024
Several improvements on a collection follow up report. From the Reports Menu, select Monthly Reports, then select "*Open Non-Paid Charges Detail & Aging*".
- Easily select date range by using the drop-down arrows for "From & Thru Days" fields.
- Specify a minimum amount owed on a charge to have it displayed.
- Check option to select charges based on Date of Service instead of Posting Date.
- Have blanks lines between accounts on report to make it easier to read.
- Indicate to eliminate the accounting aging totals on the bottom of the report.

01/02/2024

The Monthly Reports Menu, *“Account Patient Portion Aging*” report has a new option you can set to limit the report to patients you have seen within a specified number of months. For example, you can limit the report to patients you have seen in the last 24 or 36 months. This can greatly reduce the size of the report, letting you zero in on the patients most likely to pay.

The Management Report, “*Ledger Change Audit Report*” now lets you specify one or more field types of data you wish to report on. For example: you could report on just “Billing Status” or “Doctor Number” changes, etc.