Lytec

Release Notes

Business Performance Services
February 2015

Produced in Cork, Ireland

Copyright notice

Publication date

February 2015

Produced in Cork, Ireland

Product

Lytec, Release 2015

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Chapter 1 - Enhancements

This chapter presents a high-level description of the following enhancements to the Lytec® system.

In this chapter

Lytec Desktop

Patient Intake

You can now process and manage patient information entered by a patient from a mobile device. New and existing patients can enter information from a device in the physician's office and you can transfer it to your core application so that you can update the patient's information.

Note: The mobile app is supported on iPads with display dimensions of 9.5 inches or greater. Android tablets (coming soon) with display dimensions of 10 inches or greater. It is not for use with iPhone or Android phones. See the system requirements for supported Android tablets.

Security

The Patient Intake feature uses patient security. If you have access to view / save / delete patients, you also have the same rights for the Pending Patients List and Information screens.

New menu option

There is a new menu option on the Patient menu: Pending Patients. Selecting this option will open the Pending Patients List.

Figure 1. Patient menu

New Pending Patient List

This screen will show you all of the patients who have entered information via a mobile device and whose information you have not processed.

Figure 2. Pending Patients List

Click the Edit button or double-click a line item to open the Patients screen with the new Patient Intake Information section. Highlight a line item in the grid and click Delete to delete the record if it was entered in error;

This screen will refresh automatically; however, you can still manually refresh by clicking Refresh.
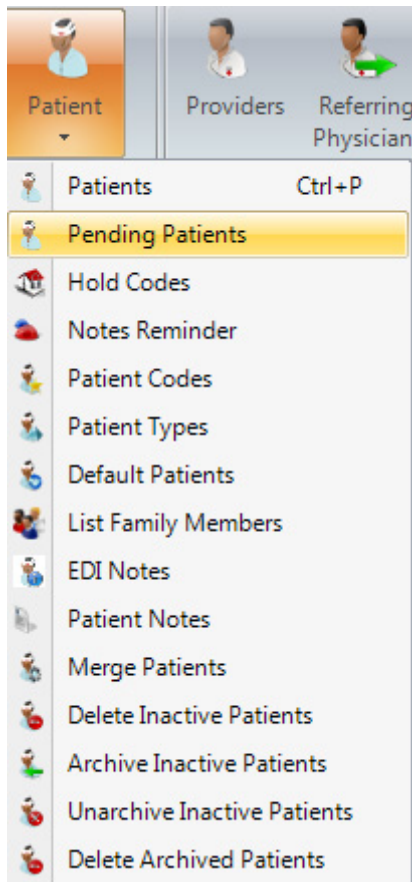
New Pending Patients pane

The Patients screen will open when you double-click a line item on the Pending Patients List or when you select a line item and click the Edit button, with the new Pending Patients pane.

Figure 3. Pending Patients screen

New patients

For a new patient, any field that had information provided during patient intake is highlighted in red.

Existing patients

For an existing patient, the modified fields are highlighted in red, and the new values appear in the Patient screen. In addition, the tabs at the top of the screen are flagged to indicate that changes were made to the data on them.

The Patient Intake Information pane on the right shows additional information that has not been auto-populated, because it requires lookups or access to other records in the practice. This information includes:

- Referring Provider
- Employer
- Guarantor (Responsible Party)
- Insurance
- Insured (Policy Holder)

You must process these changes manually. For instance, the patient may have entered information on the responsible party. If the responsible party is a person who is not currently set up in the practice, you must create a record for the new guarantor and then update the new patient's record with this information.

Click Save to save a new record or update the existing one.

New icon

The new flag icon will appear on any tab of the Patients screen that has any red highlighted fields on it, so you can see at a glance where updates have been made.

Clicking Save or closing the Patient screen will close the Patient screen.

Updated Patient screen

New menu option

There is a new option on the Patient menu of the Patient screen: Patient Intake Information.
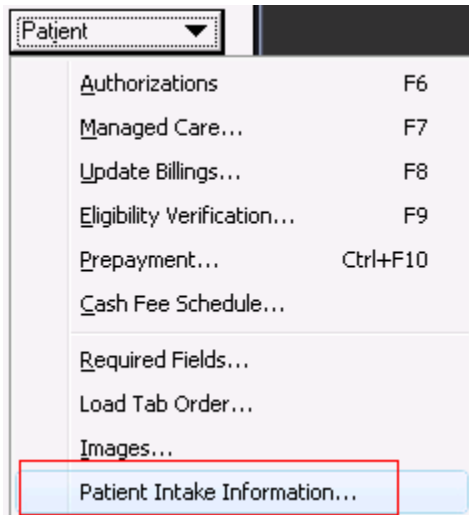

Figure 4. Patient menu

Clicking this option will open the Patient Intake Information screen. This option will be grayed out if the patient has never used the Patient Intake feature of the mobile application.

New Patient Intake Information screen

There is a new screen: Patient Intake Information. This screen will show you the information that the patient entered from the mobile application. Intakes will appear by date and time. In addition, forms that the patient completed will appear as separate items in the left column. Click an item on the left to see what was entered.

Figure 5. Patient Intake Information screen

Click the Print button to print the information; or click the Close button to close the screen.

New Hold Code

The first time you create a new patient using the mobile Patient Quick Add (see "Patient Quick Add" on page 15 for more information), Lytec will automatically create a new Hold Code: MOBILE. It will be entered on the Diagnosis/Reminder tab of the Patient's record in Lytec. When you attempt to process charges for the patient in Pending Transactions or Charges and Payments, a warning message will appear.

Any time you create a new patient using the Patient Quick Add feature on the mobile device, the new patient's record will have this hold code.

This is an alert to the user that this was a patient added with minimal information via mobile, and to know that additional information needs to be updated on this patient before you post the Pending transactions. Once the patient information has been completed, remove this hold code from the patient.

Note: Do not confuse this new hold code with the existing code MOBIL0000 that is used to designate notes and free text that come to Lytec from the mobile app.

SQL Server 2012 SP2

Lytec 2015 uses SQL Server 2012 SP2 for its database.

The table below explains the upgrade path for the different versions of Lytec.

Version	Using earlier than SQL 2005	Using SQL 2005	Using SQL 2008
Single User Multiple User Professional Client Server	Upgrade to Lytec 2010 and then upgrade to Lytec 2015. SQL Server 2012 will be installed.	Select the SQL Server check box on the Lytec Components screen during installation. SQL Server 2012 will be installed.	Lytec 2015 will work with either SQL 2008 or 2012. If you already have SQL 2008 installed, it will not be upgraded to SQL 2012. If you require SQL 2012, you will have to install it manually.
Lytec MD	Not applicable	Not applicable	Lytec MD 2015 will work with either SQL 2008 or 2012. If you already have SQL 2008 installed, it will not be upgraded to SQL 2012. If you require SQL 2012, you will have to install it manually.

Note: Microsoft removed the ability to use a password when backing up a SQL database; therefore, you can no longer use a password when making a backup for your Lytec practice database. Be sure to leave the Password field empty when making a backup.

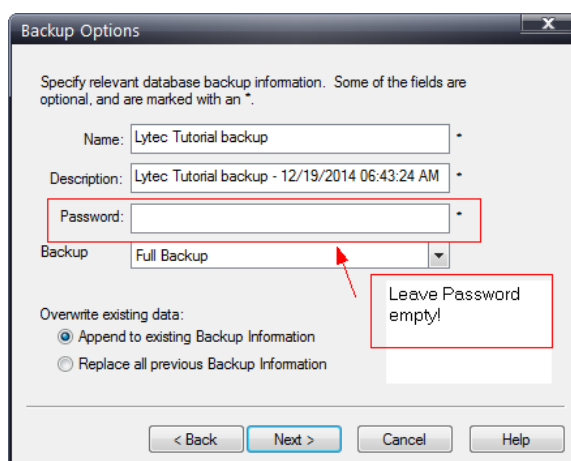Note: If you are using SQL Server 2008, you may still use the Password field.

Figure 6. Backup Options screen

Installing SQL Server 2012 manually

If you are:

- Upgrading from an earlier version of Lytec

- Installing SQL Server 2012 manually prior to installing Lytec 2015

be sure to verify that the sa password to the database is set to Clinical$1 prior to installing SQL or Lytec. If the password is not this value, you will not be able to open the tutorial database or open new or existing practices after the upgrade.

To change the sa password:

1. Start SQL Management Studio and use Windows Authentication to log in.

2. Open Object Explorer.

3. Expand the Security folder.

4. Expand the Logins folder.

5. Right-click on sa and select Properties.

6. Enter Clinical$1 in both the Password and Confirm password fields.

7. Click the **OK** button.

After you have installed SQL Server 2012 manually and successfully installed Lytec 2015, you can change the sa password back to what it was or even something else using the steps above. Then, when you launch Lytec 2015,

1. Press and hold the F7 key and launch Lytec. The Specify Default SQL Credentials screen appears.

2. Make sure LytecMD is selected for the Server.

3. Enter the new password for sa.

4. Click the **OK** button.

Checksum Removed

MPIC checksum validation has been removed from Lytec.

Lytec Mobile

If you reboot your server or manually restart the mobile connection service, the mobile connection service can take up to 5 minutes to restart.

Finding the Mobile app

1. Go to the iTunes App Store.

2. Search for Lytec 2015.

3. Download Lytec 2015.

Figure 7. Lytec Mobile icon

Appointments screen

Updated Appointments screen

The appointments screen has been updated to allow viewing by resources. You can navigate to view appointments for a single resource or multiple resources. You can view appointments for the current day or move forward or backward to see future or past appointments.

Date selection

Tapping on the date allows you to select a different date. Tapping on the < or > allows you to move backward or forward a day. Use the slide gesture to change the month.

Figure 8. Date selection

Multiple Resource selection

Tapping on the Resource name allows you to select a different resource or multiple resources.

• If no resources are selected, the display will show Select Resource.

• If you have a single resource selected, the display will show the resource's name.

• When you have multiple resources selected, the display will show Selected Resources.

When you have multiple resources selected, tapping the < or > will display the appointments for the previous or next resource displayed.
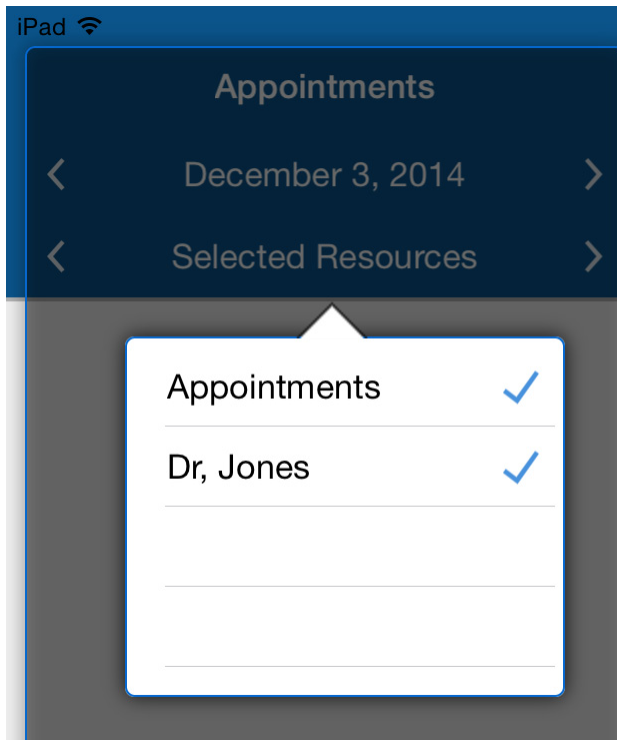

Figure 9. Resource selection

Patient selection

Tapping the patient's appointment will display the patient's information on the Patient Card on the right side of the screen. The patient's information initially appears in collapsed format. Tap the arrow button at the right to expand the patient card.
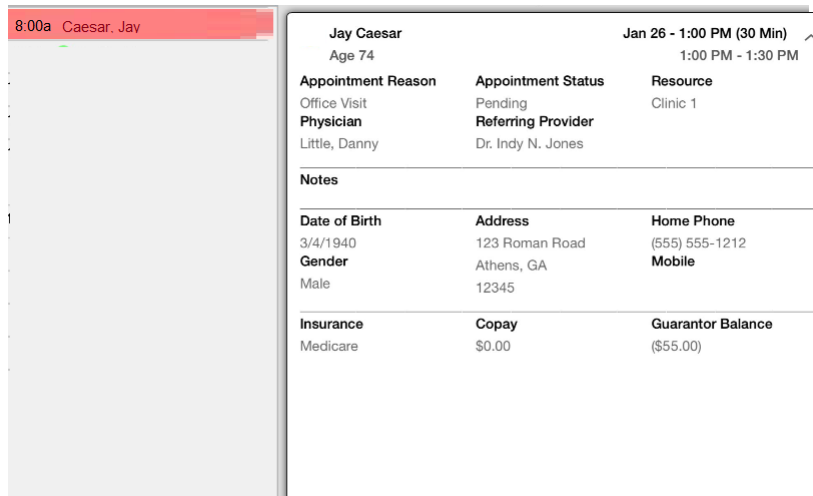

Figure 10. Patient selection

New icons

There are two new icons on the Appointments screen. The table below lists the icons and their descriptions.

Icon	Description
✓	This icon shows you if charges have been sent for the appointment.
👤	This icon shows you if patient intake was completed for the patient.

These icons appear next to the appointment when Patient Intake has been completed or when charges have been sent.
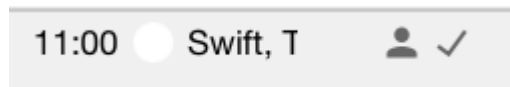

Figure 11. Appointment with icons

Week at a glance

You can also view the entire week by clicking the Week at a Glance button 📅 in the top right.

Figure 12. Week at a glance screen

This button will be disabled if you have multiple resources selected. Use it only with a single resource.

You can tap a patient to open the patient view or click the Done button to return to the homepage.

New default settings

Quick Add

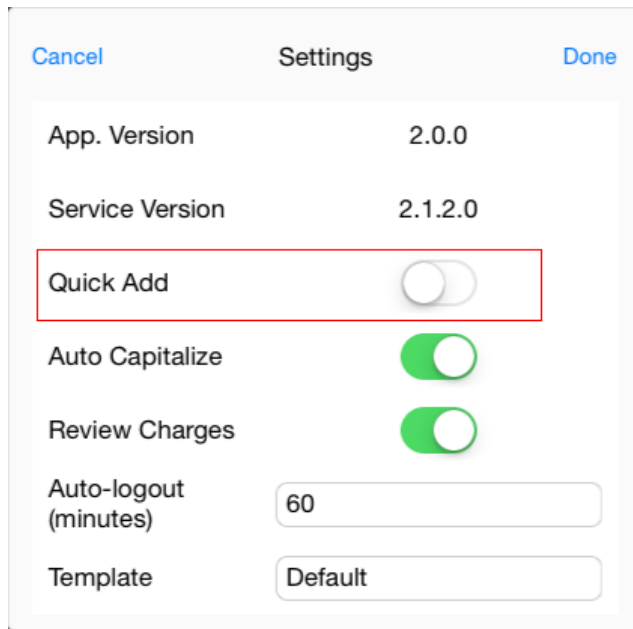There is a new default setting on the Settings screen: Quick Add.

Figure 13. Settings screen

The table below describes the two switch settings.

Setting	Description
On	The device will open the Quick Add screen when you search for a patient and tap Add Patient. The Patient Intake option will be hidden. For more information, see "Patient Quick Add" on page 15.
Off	Performing a patient search will open the Search screen so you can search for a patient. The Patient Intake button will be available. For more information, see "Updated Patient Search" on page 16.

To change this setting:

1. On the main screen, click the Settings ⚙ icon. The Superbill Template appears.

2. Tap the Settings link at the top right of the screen. The Settings screen appears.

3. Select your setting.

4. Tap Done.

Auto Capitalize

There is a new setting: Auto Capitalize.
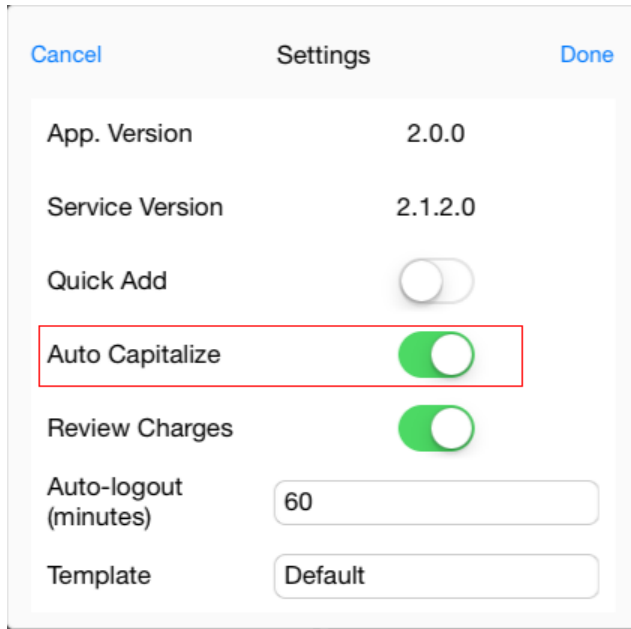
Figure 14. Settings screen

The table below describes the two switch settings.

Setting	Description
On	Every free text field in Patient Intake and Quick Add will be capitalized.
Off	Normal word capitalization occurs in Patient Intake, except for free text fields in Medical History, and Quick Add.

To change this setting:

1. On the main screen, click the Settings ⚙ icon. The Superbill Template appears.

2. Tap the Settings link at the top right of the screen. The Settings screen appears.

3. Select your setting.

4. Tap Done.

Patient Quick Add

Providers can now add a new patient to the practice data using abbreviated patient information. This includes first name, middle name, last name, gender, date of birth, and telephone number.

Figure 15. Patient Quick Add screen
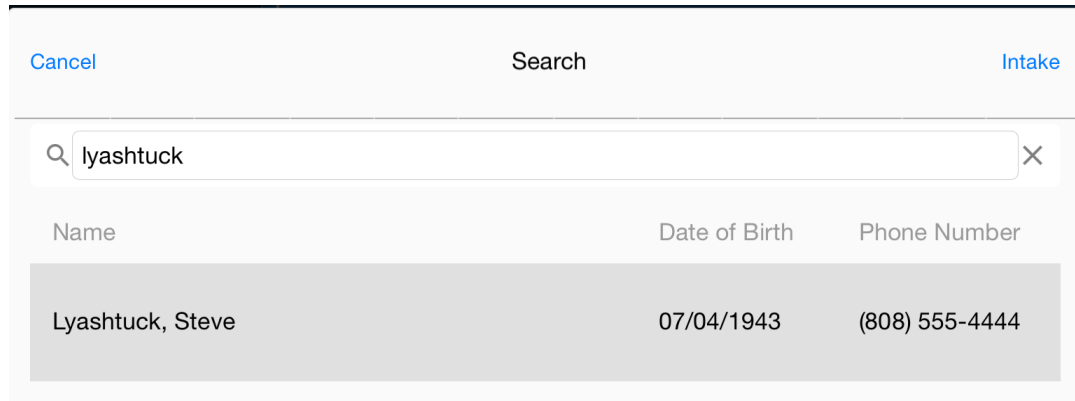
Once you tap Done, you can send charges for the patient.

The first time you add a patient using Patient Quick Add, a new Hold Code will be created in Lytec called MOBILE. This hold code will be entered on the Diagnosis/Reminders tab for the new patient and will alert you when you attempt to process charges in Pending Transactions. Use this as your reminder that additional information needs to be entered for the patient prior to posting charges.

Updated Patient Search

Patient search results now include the phone number. If there is only one phone number entered for the patient, the screen will display that number. If multiple phone numbers are entered, the application will display based on this priority:

- Cell/mobile

- Home

- Work

Cancel	Search	Intake

🔍 lyashtuck	✕

Name	Date of Birth	Phone Number
Lyashtuck, Steve	07/04/1943	(808) 555-4444

Figure 16. Patient Search screen

New link

Clicking the Intake link will open the patient intake.

This link will not be available if the Quick Add setting is enabled; and is available only for new patients.

Patient Intake

Note: The mobile app is supported on iPads with display dimensions of 9.5 inches or greater. Android tablets (coming soon) with display dimensions of 10 inches or greater. It is not for use with iPhone or Android phones (see the system requirements for supported Android tablets).

Apple does not provide developers with a way to programmatically prevent users from changing focus to a different application. McKesson recommends you use Guided Access when using the Patient Intake feature. Please visit http://support.apple.com/en-us/HT202612 for more information.

New and existing patients can now enter and/or update their information via Lytec Mobile. Several screens will allow the patient to enter:

- Patient information

- Employer information

- Payment responsibility

- Emergency contact

- Insurance

- Medical history

- Forms and signatures

For new patients, all fields will be blank. For existing patients, information from the patient's record in Lytec will appear on the mobile device, allowing the patient to make updates.

NOTE: existing medical history will NOT appear on the mobile device. No patient information is stored on the mobile device. Instead, it is stored in the practice in Lytec.

Once the front desk person activates the device, the patient will be able to enter information. The patient can then tap in the fields and complete the forms.

It is recommended that fields with "Required" in them be completed during patient intake. However, only the patient's first name and last name are required to save the record.

When you have finished all the questions in a section. click the Continue button. A blue checkmark will appear in the Patient Contact Information category.

New menu option

There is a new menu option on the main screen: Patient Intake. Once you select an appointment or select a patient from the Search screen, the patient card will be filled and the Patient Intake button will be enabled. Tap this button to open the Patient Intake screen.
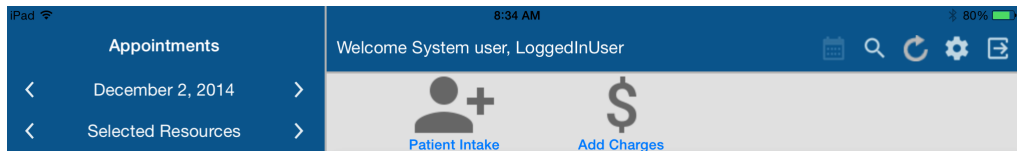

Figure 17. Mobile app screen

Patient Intake lockdown

Once you tap Patient Intake, the Lytec mobile app will be locked down so that patients cannot exit Patient Intake. This helps to ensure that patients' access to the mobile device is limited to the Patient Intake feature only.

McKesson recommends a hard cover for all mobile devices that you present to patients so that patients are unable to access any buttons on the device as well.

Launching Patient Intake

You can launch Patient Intake in the following ways:

For existing patients

1. Tap an appointment to display the patient's card on the right. Then, tap Patient Intake.

For new patients

1. Open the Search screen.

2. Tap the Patient Intake link.

New Menu

On the Patient Intake screen, there is a new menu. Use this menu to navigate the pages of the patient information intake. You can tap a menu item to open the corresponding page.
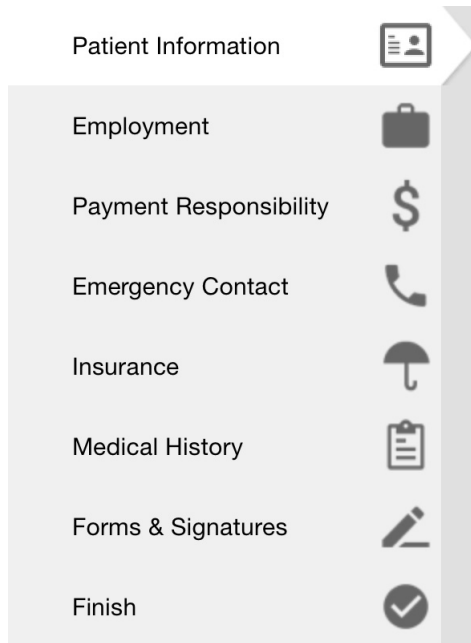

Figure 18. Patient Intake left menu

Once the patient has tapped Continue at the bottom of each section, a blue check mark will appear next to the category to show it has been completed.
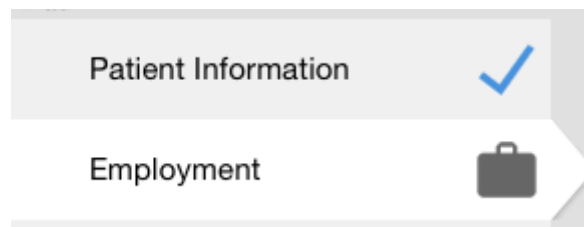

Figure 19. Patient Intake menu

New Navigation controls

There are three new navigation controls that you will use during patient intake.

Keyboard

Use the keyboard to type information for the form. Tap the field and then type.

Figure 20. Keyboard control

Picker

Use the picker to select a value from a drop-down menu. Tap in the field you want and then tap the value you want (you may need to scroll to find the value you want). Then, tap Done.

Figure 21. Picker control

Switch

Use the switch to select from two values. Tap the switch to change its setting.

Figure 22. Switch control

Workflow for Patient Intake

Use the following workflow when a patient uses a mobile device to enter information.

1. Start the Lytec Mobile app on the device.

2. Perform a search for the patient or choose the patient from the schedule. For new patients, open the Search screen.
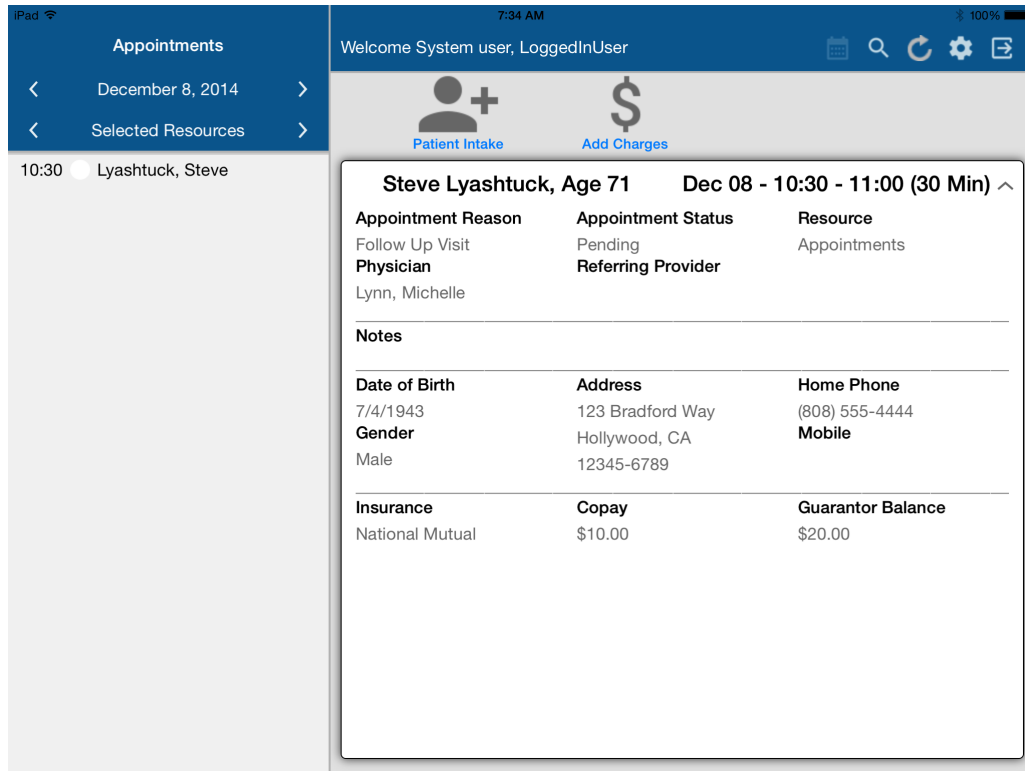
3. Tap Patient Intake.

4. You are ready to hand the device to the patient when the screen looks like this:
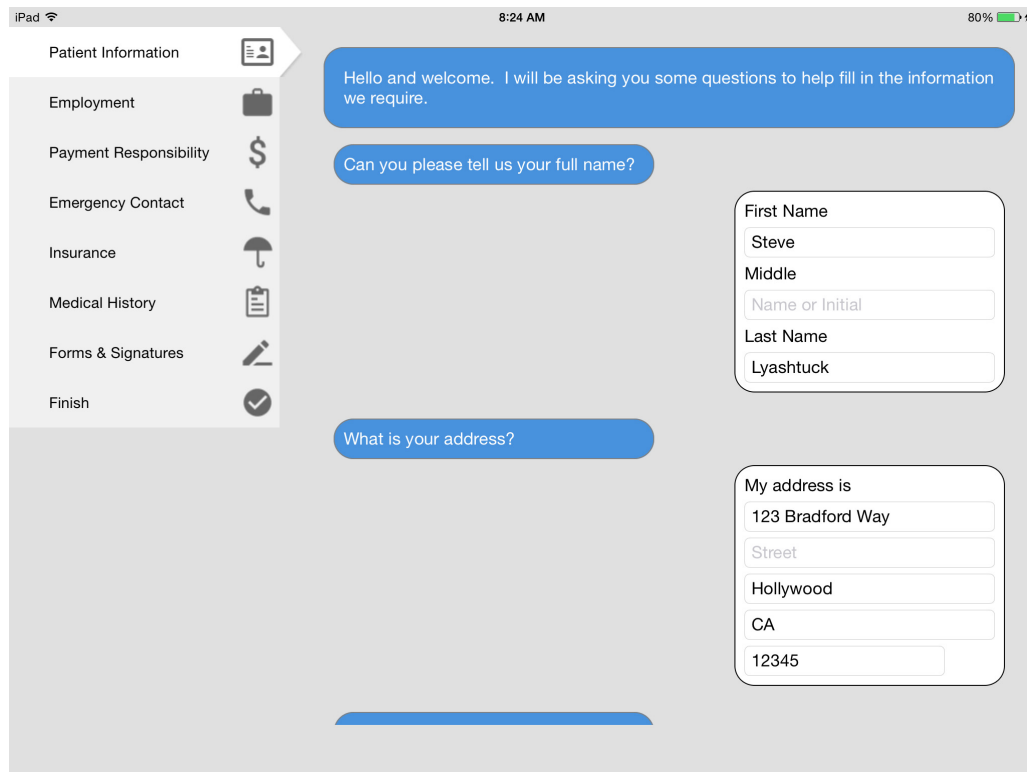
Figure 23. Mobile app ready for patient

NOTE: existing patient information will be populated automatically.

5. Give the device to the patient.

6. When you receive the device from the patient, you can verify that the patient tapped I am Finished when the screen looks like this.
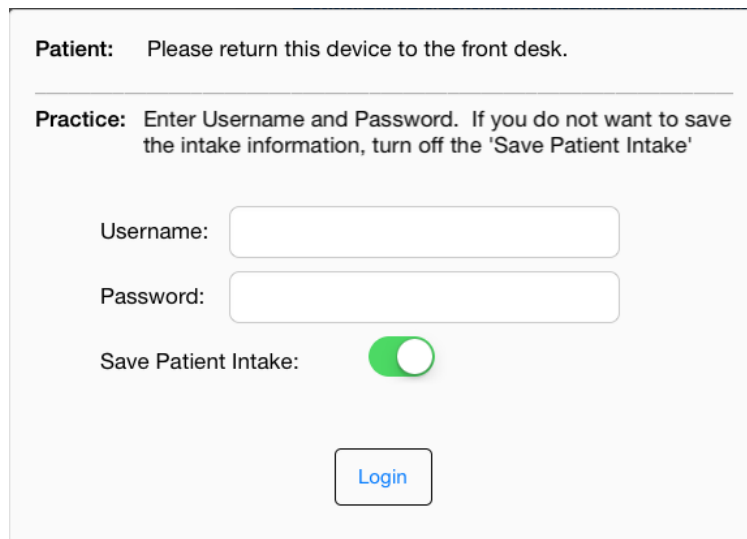
Figure 24. Mobile app when received from patient

7. Enter your Username and Password.

8. If you want to save the patient's information, make sure the Save Patient Intake setting is On (green).

9. Tap Login.

10. Follow the workflow in Lytec for updating the patient record in Lytec.

Revenue Management

For Revenue Management, an updated version of the "InfoExchangeClient.jar" file has been included in the Lytec 2015 installer. In addition to the updated .jar file, the "RELAY" communication session used for sending electronic claims to RelayHealth has also had the address updated to communicate with the new RelayHealth EMF mailbox portal (https://infoexchange.relayhealth.com). Both of these configurations are for RelayHealth customers who have already completed their EMF migration.

For more information on the RelayHealth EMF migration, see "Moving to New Electronic Mailbox Facility (EMF) Connectivity" on page 45.

Diagnose Mobile

The Diagnose Mobile screen has been updated. The screen now shows you how many practices have been loaded by the Mobile service. In addition, there is a new display to show if the host GUID is registered.

If you reboot your server or manually restart the mobile connection service, the mobile connection service can take up to 5 minutes to restart.

New buttons

New Clear all Practices button

There is a new Clear all Practices button. Clicking this button will delete all practices from the cache and you will have to re-register with the Mobile-About screen in Lytec. In addition, this button will clear the entire database cache as well, including the API keys.

WARNING: McKesson recommends that you use this feature ONLY under the direction of McKesson Technical Support.
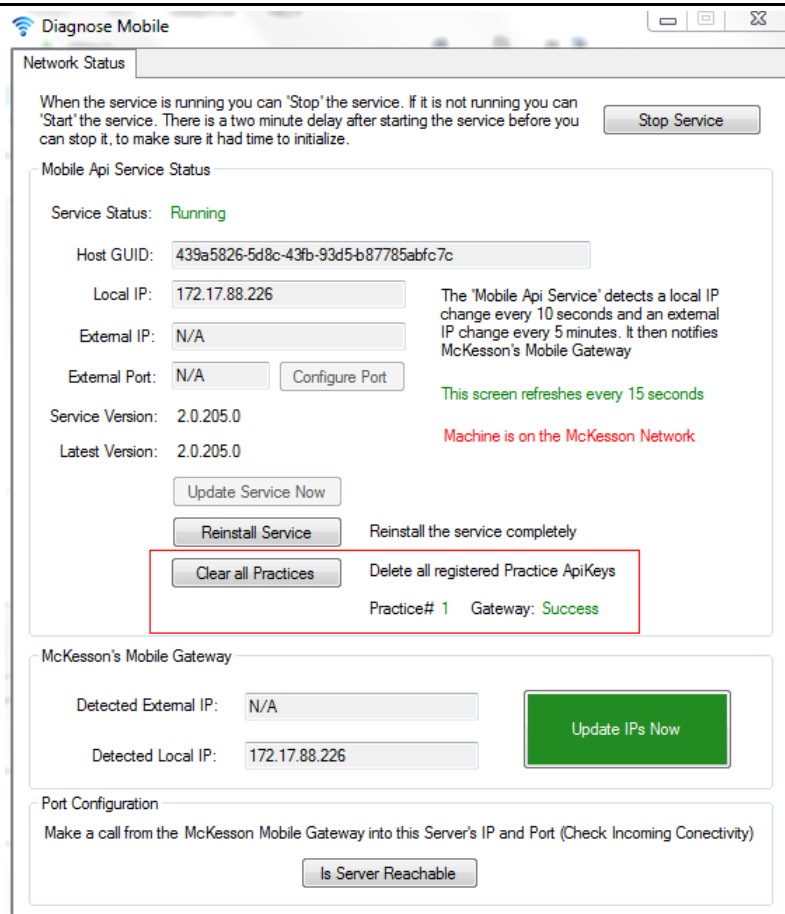
Figure 25. Diagnose Mobile screen

Configure Port button

Use the Configure Port button to manually change the port that the mobile service uses.
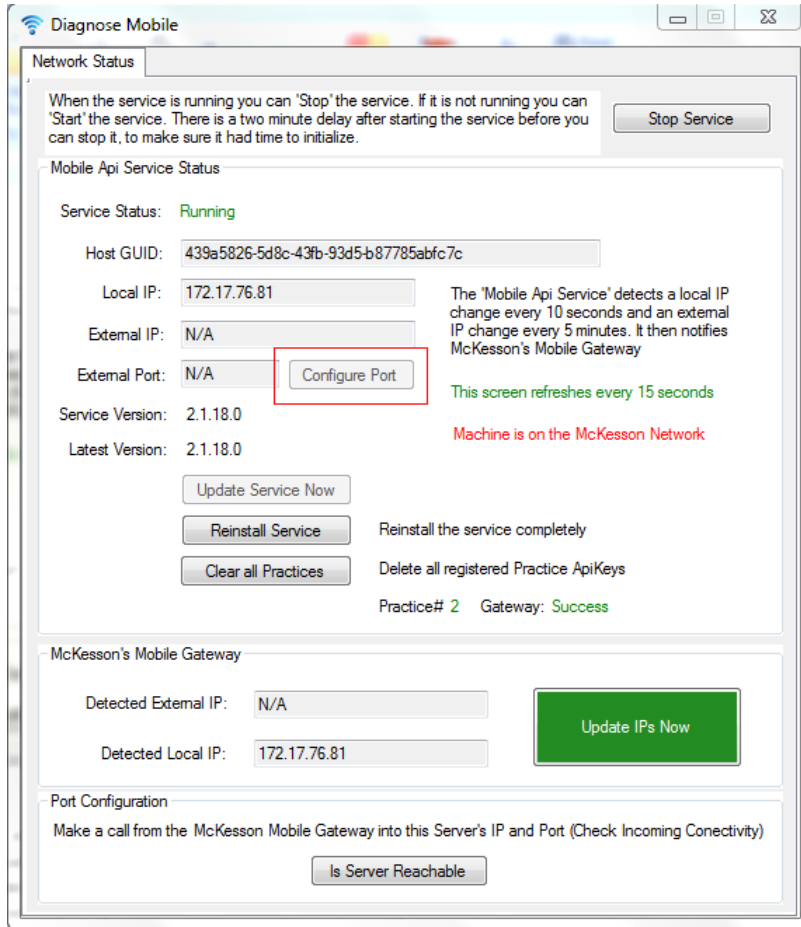
Figure 26. Diagnose Mobile screen

When you click the Configure Port button, the Configure External Port screen appears. Enter the port here and click the Save button.
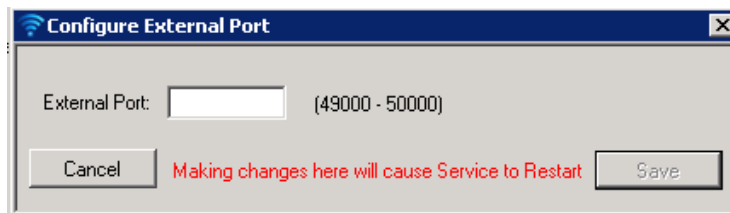
Figure 27. Configure External Port screen

Note: Ports outside of the range 49000-50000 are not supported. If you change the port to a value outside of this range, connectivity tests will fail.

Chapter 2 - Customizable Forms for Patient Intake for Lytec Mobile

Below are some general guidelines for the customizable forms that are part of the Patient Intake feature on the Lytec Mobile application.

NOTE: Prior to making any change to McKesson-supplied forms, be sure to make a copy of each, using a different name! You can use these as backups and as examples of correct coding. When you save the backup, McKesson recommends that you use the extension *.bak. If you use *.html, the backup form will also appear in Patient Intake.

There are two forms that you can customize:

- Medical History Template
- Practice Forms

Note: The mobile application will create these forms the first time you perform a patient intake, so you must perform an initial intake before you can edit them. Also, if you accidentally delete the forms, they will be recreated in their original state when you perform another patient intake.

McKesson recommends using Notepad ++ to edit the Medical History and Practice Forms.

Medical History Template

You can have one medical history template per practice.

Location on server

The template will be stored in the following directory on the server that hosts the McKesson Mobile API service:

- c:\Program Files (x86)\McKesson Mobile Api\MedicalHistoryTemplates\dbName\
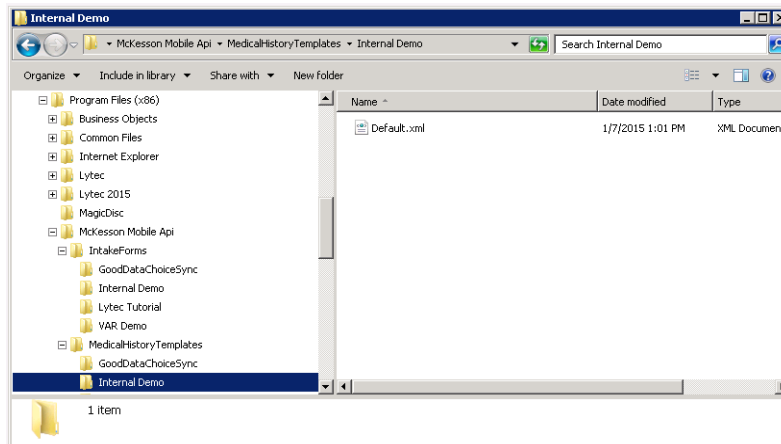
Figure 28. My Computer screen

NOTE: "dbName" is a placeholder as presented here. The actual folder will be the database name. If you are hosting for a customer, then multiple different database names may appear here.

The McKesson-provided template is named **Default.xml**. You must keep this name if you are making changes to the template.

\Structure of Default.xml

The xml must conform to the following structure:

Element	Description
Root	<MedicalHistoryTemplate xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance " xmlns:xsd="http://www.w3.org/2001/XMLSchema">
<Name>	This is used only for informational purposes at this time.

<Introduction>	This is the top message that is displayed at the top of the Medical History section and should contain a general statement about the section and any special information that you wish to relay regarding the section. The default introduction will be the following: "I will now ask you some questions about your medical history."
<QuestionBlocks>	This element will contain the list of questions and answers that will be listed on the Medical History page. The <QuestionBlocks> element can contain one to many <QuestionBlock> sections.

<QuestionBlock> section

A <QuestionBlock> section contains the following elements:

Element	Description
<DisplayText>	This contains the question to be asked - it will be displayed on the left with a blue background.
<Answers>	This element allows for more than one answer (<Answer>) to be provided for a question. If there is only one answer, it still needs to be contained within an <Answers> element.

<Answer> element

<Answer> elements contain the following values:

Value	Description
<Answer>	This section will contain elements that define the text to be displayed with the input field, the type of input field, field length, and list of values for a pick list input field. Each <Answer> section should contain all of the following four elements and leave the ones that are not applicable blank.
<DisplayText>	This contains text to be displayed with the input field.
<FieldType>	The type of field to be displayed. Valid values are the following: • Yes/No - switch control • Text - text field • PickList - pick list control See below for examples.
<FieldLength>	This element is required for the Text field type.
<Values>	This element is required for the PickList field type. The list of values should be provided in a <Value> element

Table of Field types

Type	Code sample

Yes/No field	`<Answer>`
	`<DisplayText>Hypertension</DisplayText>`
	` <FieldType>YesNo</FieldType>`
	` <FieldLength></FieldLength>`
	` <Values>`
	`   <Value></Value>`
	`</Values>`
	`</Answer>`

Text Field	`<Answer>`
	`<DisplayText>I take the following medications:</DisplayText>`
	`<FieldType>Text</FieldType>`
	`<FieldLength>250</FieldLength>`
	` <Values>`
	`        <Value></Value>`
	` </Values>`
	`</Answer>`

PickList field	`<Answer>`
	`    <DisplayText>How would you rate your pain level:</DisplayText>`
	`    <FieldType>PickList</FieldType>`
	`    <FieldLength></FieldLength>`
	`    <Values>`
	`<Value>Mild</Value>`
	`<Value>Moderate</Value>`
	`<Value>Severe</Value>`
	`    </Values>`
	`</Answer>`

Practice Forms

The practice can have multiple forms to display within the patient intake process. The forms will be created using HTML.

Location on Server

Practice forms are stored in the following directory on the server that hosts the McKesson Mobile API service:

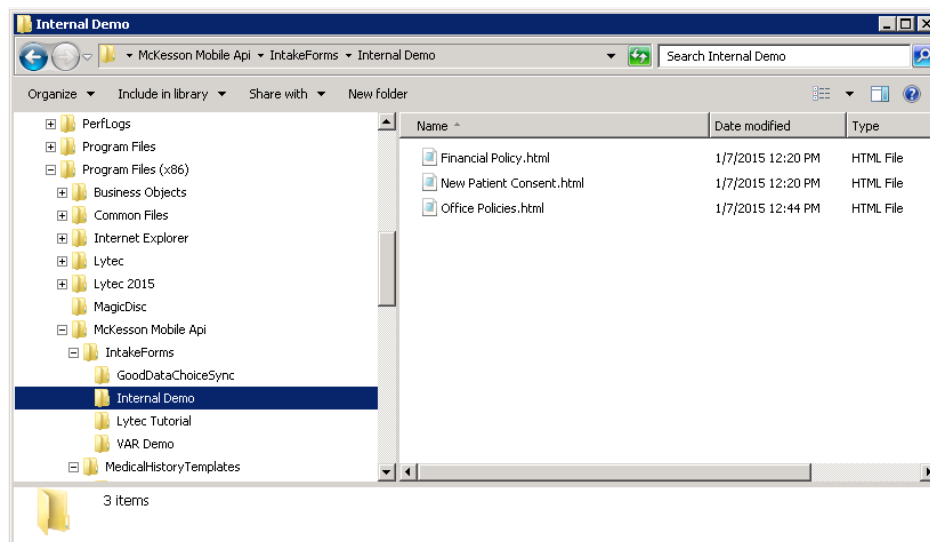- c:\Program Files (x86)\McKesson Mobile Api\IntakeForms\dbName\

Figure 29. My Computer screen

NOTE: "dbName" is a placeholder as presented here. The actual folder will be the database name. If you are hosting for a customer, then multiple different database names may appear here.

McKesson-provided Forms

There are three default forms provided by McKesson:

- Financial Policy
- New Patient Consent
- Office Policies

Format

The files must have an HTML (*.html) extension and contain valid HTML code.

The name of the file will be the name of the form displayed within the application. The files must contain the following tags:

- <html>

- <title>

- <body> (the

- contents of the form must be within the <body> tag.)

Basic HTML formatting tags are supported, such as <p>, <br>, <hr>, <b>, <i>, <ol>, <ul>, and so on. However, more complex HTML tags are not supported, such as <img>, <a href>, <form>, <frame>, <input>, <select>, <button>, <submit>, and so on.

The default forms contain a few tokens within the files that indicate special processing. Below is a list of the tokens:

Token	Description
$(PracticeName)	This token will be replaced with the practice's name from Lytec. You can place it anywhere in the form that you want to have the practice name displayed

Signature tokens:
 	
 $(SignatureBegin)
 	
  $(SignatureFirstName)
 	
  $(SignatureLastName)
 	
  $(SignatureDate)
 	
$(SignatureEnd)
	These tokens will be replaced with the signature information provided in the Forms section.
	
	Note: The information between the $(SignatureBegin) and $(SignatureEnd) tokens will not be displayed to patients when they are viewing the form. This data will be updated when the intake information is submitted and it will be viewable within the Lytec desktop application.

There are also two placeholders in the default Office Policies form.

- ##practice name##

- ##practice / provider names##

Replace these placeholders with the appropriate text for the practice.

Example

You want to add the following questions to the Medical History Form:

The reason for your visit today is {Free Text}

Is this condition interfering with {Picklist with values of "work", "sleep", and "daily routine"}

Is the condition getting worse {"yes" and "no" answer}

1. Open the Medical History template (Default.xml) within Notepad++ or another editor.

2. Find the position in the form that you want to place these questions within the <QuestionBlocks> element.

3. Type in the XML code, using the guidelines above for QuestionBlock, Answers, and Answer. Below is an example of how the code will appear.

   Notes:

   • The entire section is bracketed by <QuestionBlock>.

   • The initial question is part of a <DisplayText> section.

   • All answers are in an <Answers> section

   • Each individual question is bracketed with <Answer> and </Answer>

Below is how the form will appear on-screen:

Figure 30. Form appearance

Below is the picklist displayed:

.

Figure 31. Picklist

Troubleshooting tips

In general, if the practice form does not appear as you expect, review the HTML in the form for missing or invalid HTML tags. The table below gives suggestions for other issues.

Problem	Possible solutions
I don't see the changes I made to a form.	Verify that you saved the form with the correct extension (*.xml for the Medical History template and *.html for the Practice Forms). Verify that you saved the form in the correct folder (see above for details).
I receive this error when opening patient intake: "An error occurred reading the medical history template."	Open the Medical History template and verify that there are no invalid XML tags.

Examples

XML files uses tags to designate where information displays in the medical history form:

```
Initial text display about medical history area:

    <Introduction>This is an example.</Introduction>

Question block area:

    <DisplayText>Have you ever?</DisplayText>

Answers for a question:

    <Answer>
            <DisplayText>Hypertension</DisplayText>
            <FieldType>YesNo</FieldType>
        <FieldLength></FieldLength>
        <Values>
                <Value></Value>
        </Values>
    </Answer>
```
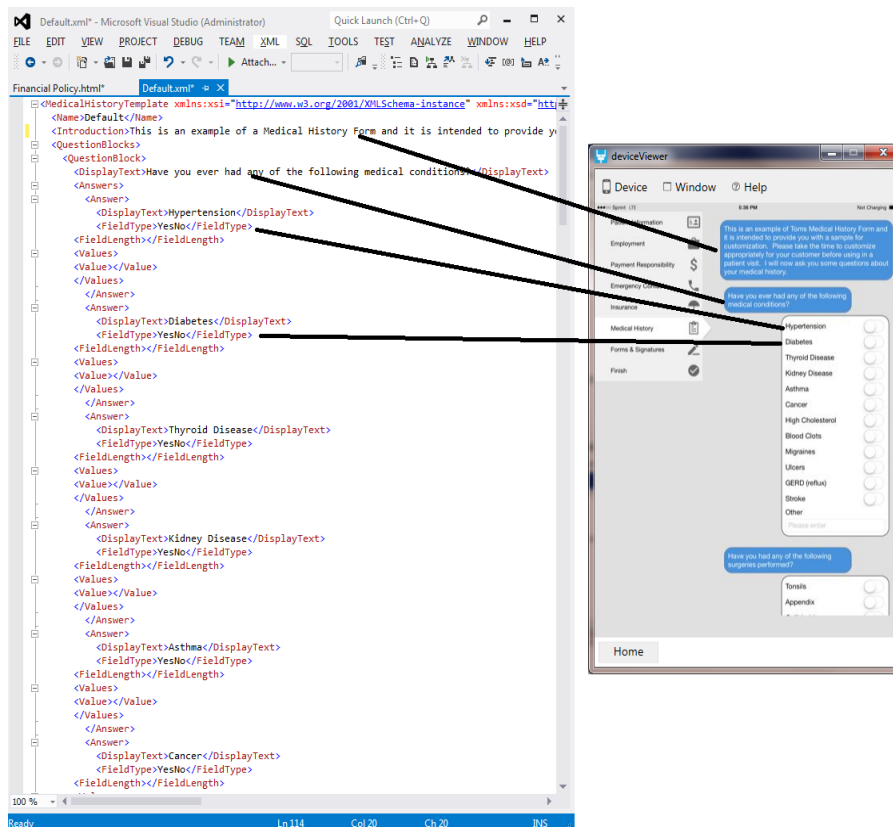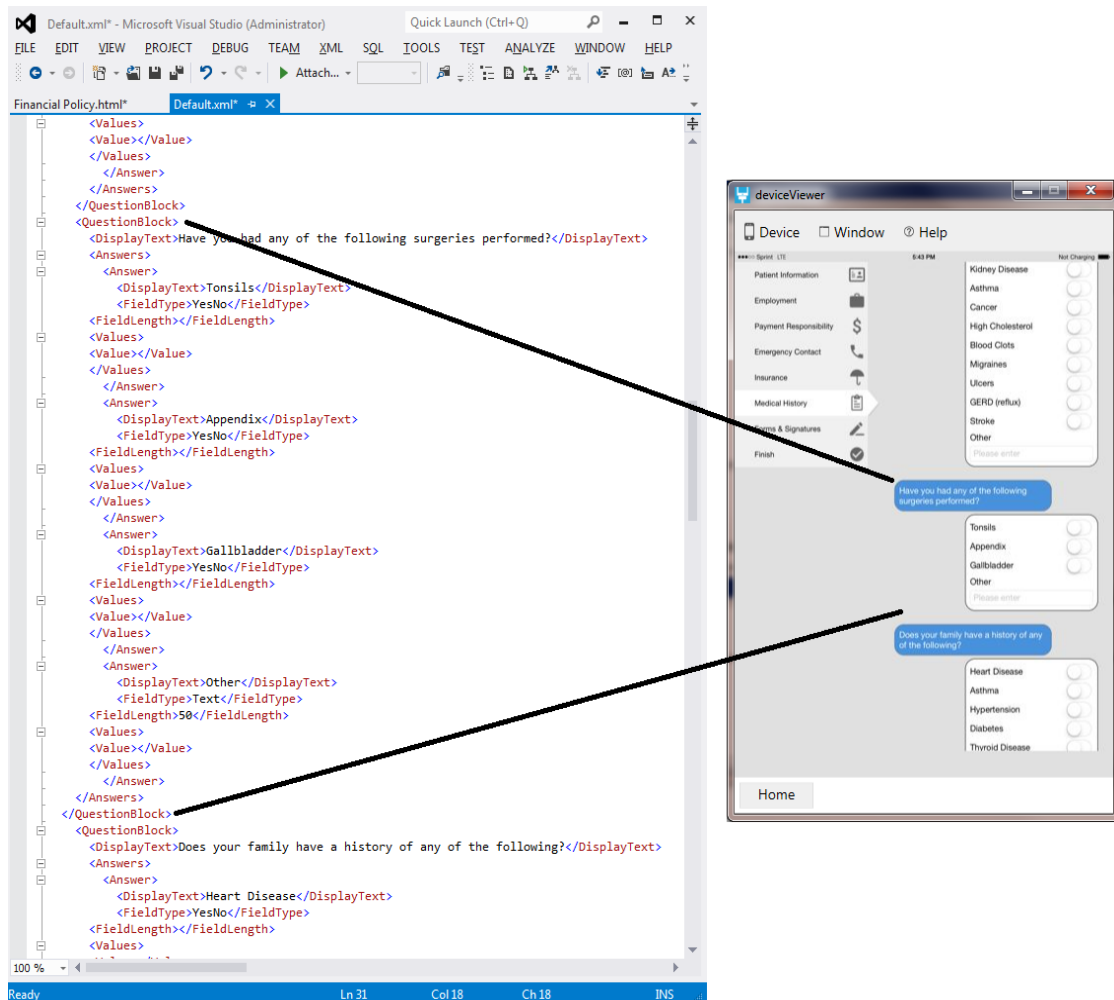

Figure 32. Code example

Question Block is used to group items together on the form for a question:

```
<QuestionBlock>

        Blah blah blah

</QuestionBlock>
```
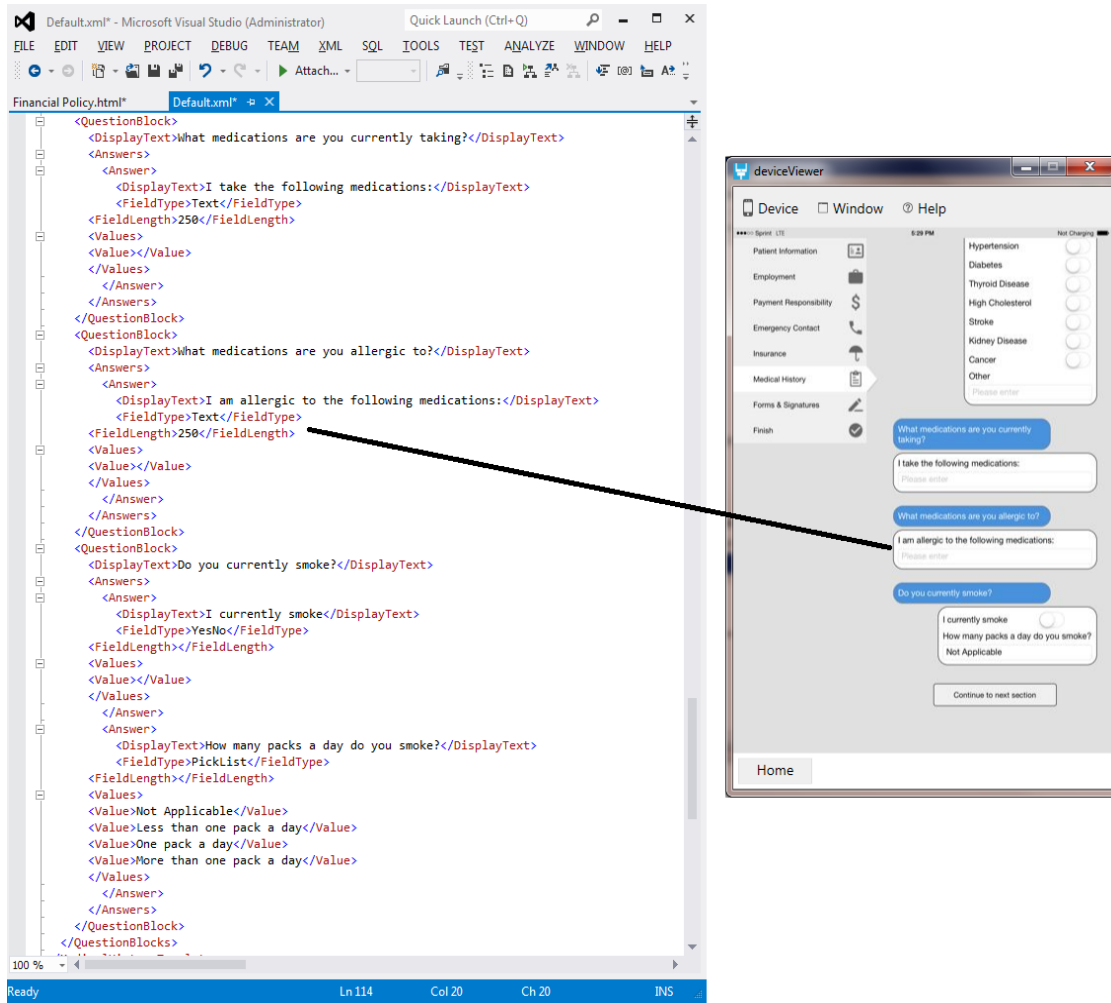

Figure 33. Code example

Free form text field:

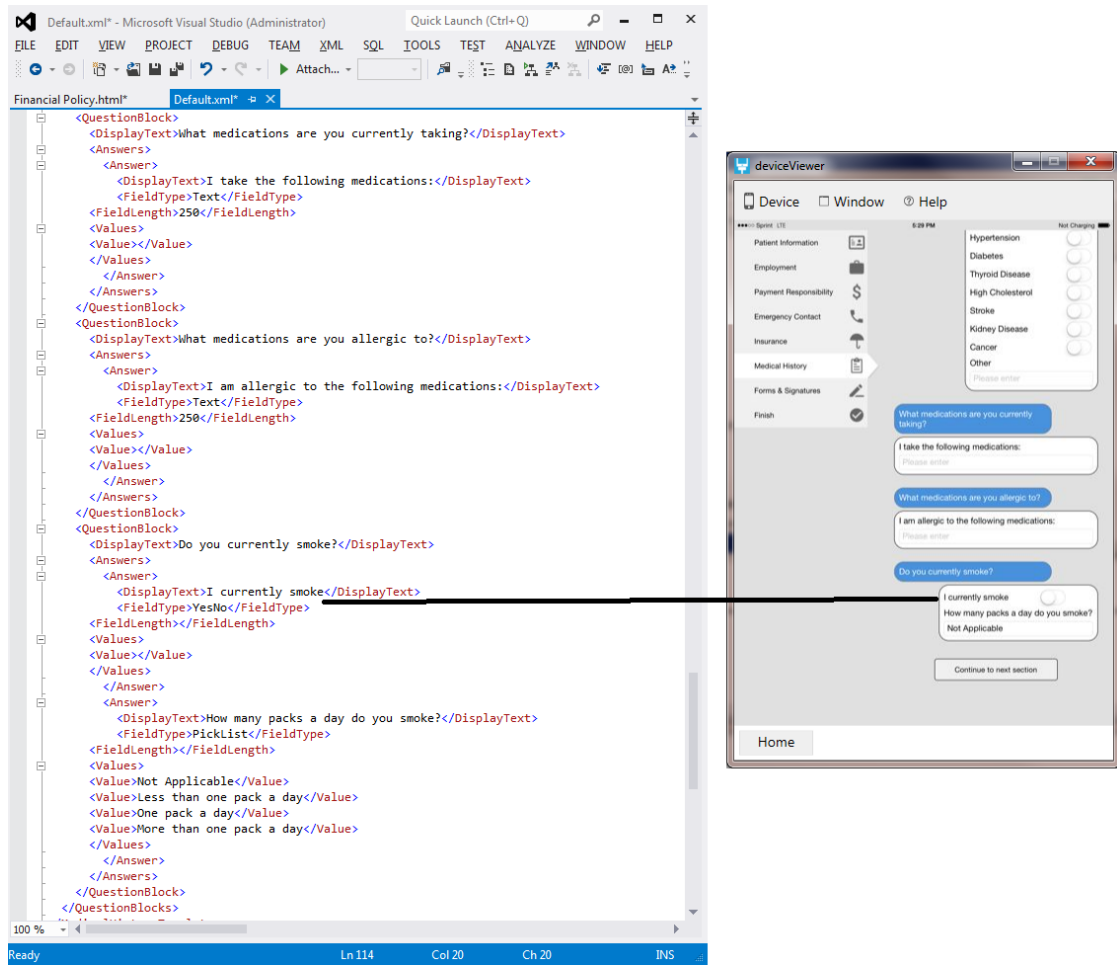*Figure 34. Code example - free form text*

Yes/no answer field:

Figure 35. Code example - Yes/No Answer

Multi Select Field

Intake Form Example:

Paragraphs

```
<p>
    <b>This is an example of a Practice Form and it is intended to
    provide you with a sample for customization.
    Please take the time to customize appropriately for your
    customer before using in a patient visit.</b>
```
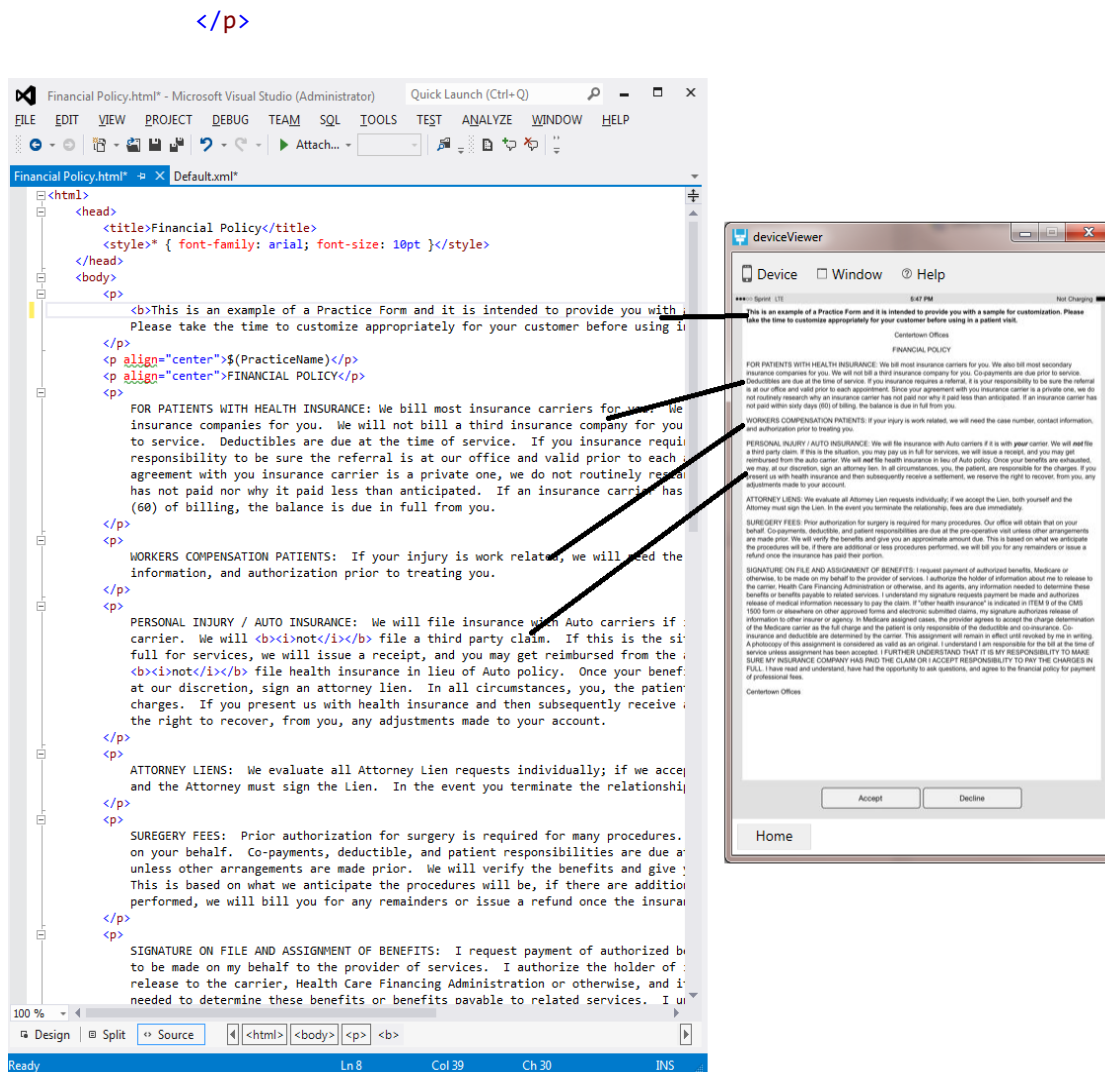
```
</p>
```


Figure 36. Paragraph example

Note: If the XML gets corrupted, the mobile application with display an error in the patient intake module: 'An error occurred reading the medical history template' and the medical history section will be blank.

Special attributes like bold and underline

```
<style>* { font-family: arial; font-size: 10pt }
        .auto-style1 {
            font-family: 'Times New Roman'; font-size: 10pt
            font-weight: bold;
            text-decoration: underline;
        }
    </style>
</head>
    <body>
```

```
<p>
        <span class="auto-style1">This</span>
</p>
```
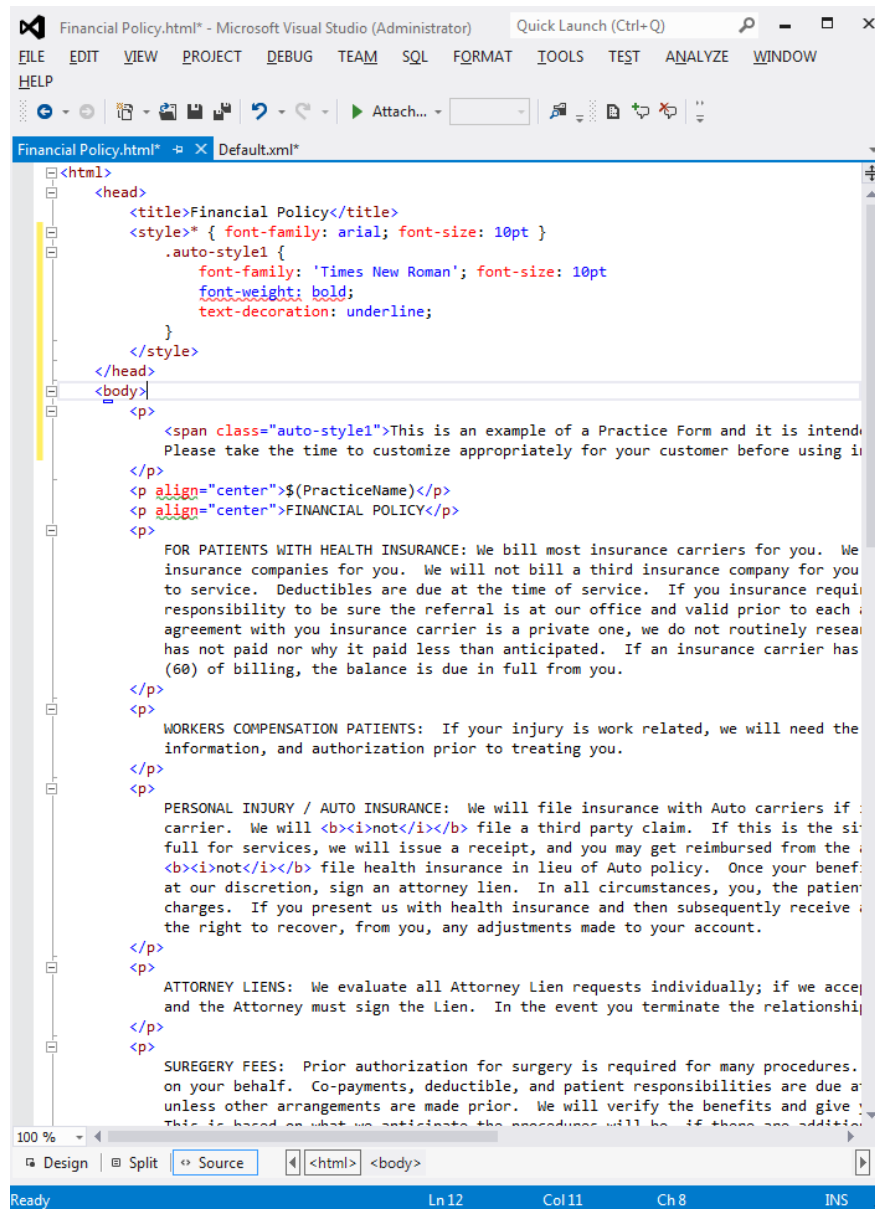

Figure 37. Special attributes example

Special tags get replaced within the application once the form is signed by the user and then displayed in the core product:

Token	Description

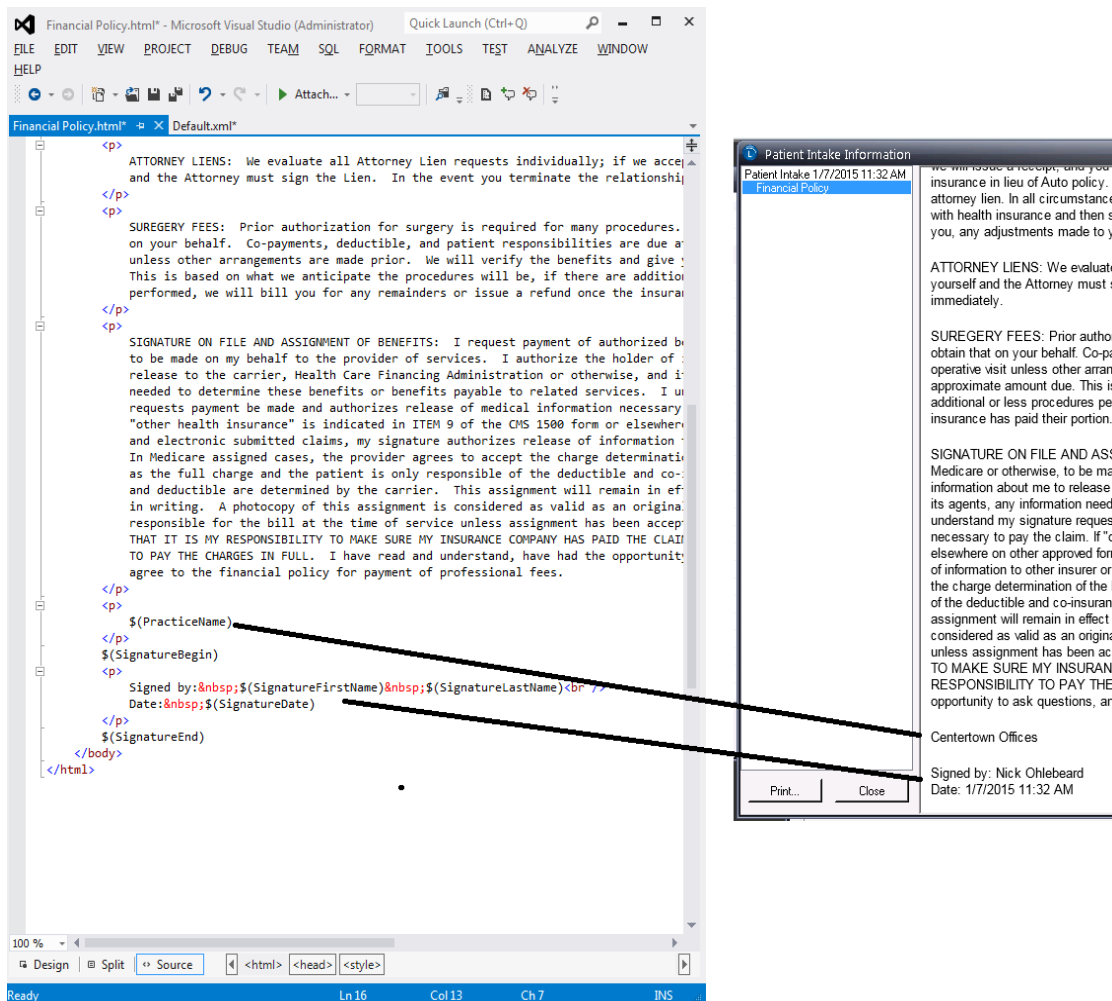|	
$(PracticeName)	This token will be replaced with the practice's name from Lytec. You can place it anywhere in the form that you want to have the practice name displayed.

Signature tokens:
 	
 $(SignatureBegin)
 	
      $(SignatureFirstName)
 	
      $(SignatureLastName)
 	
      $(SignatureDate)
 	
$(SignatureEnd)
	These tokens will be replaced with the signature information provided in the Forms section.
	
	Note: The information between the $(SignatureBegin) and $(SignatureEnd) tokens will not be displayed to patients when they are viewing the form. This data will be updated when the intake information is submitted and it will be viewable within the Lytec desktop application.

Figure 38. Special tags example

Appendix A - Moving to New Electronic Mailbox Facility (EMF) Connectivity

Action Required: Please move to the new EMF solution. If you have any questions or need assistance, please contact your Account Executive or Support.

Details on Connectivity Enhancements

To improve efficiency and provide a better user experience, RelayHealth has rolled out enhancements to Electronic Mailbox Facility (EMF) connectivity. Once you move to the new solution, you will see a greater number of self-service tools that enable you to quickly make changes without contacting Support, as well as the ability for multiple users to access EMF at the same time, which increases productivity.

Enhancements include:

- Access to a new InfoExchange® website for all customers, with self-service tools that give you the ability to:

  Reset password

  Audit information

  Update compression options

  Shut off acknowledgment reports

- Use multiple connectivity options at one time
- The ability to view files prior to download
- Share multiple concurrent sessions
- Auto-Archive your downloaded files
- Download archived files for 14 days

To receive all these new benefits, you must move to the new solution.

How to Get Started

- Download the new infoExchangeClient.jar file from the Download tab at https://infoexchange.relayhealth.com

  - If it is before March 2, 2015, see "Downloading the new .jar file prior to March 2, 2015" on page 46)

  - If it is after March 2, 2015, see "Downloading the new .jar file after March 2, 2015" on page 51.

- If applicable, remove any scripted delete process since files are automatically moved to the online archive when downloaded

- If you are using parse logs for messages, then the changes to log files may impact you. Review the changes in the ReadMe from the .jar file.

- For self-service tools, go to the new InfoExchange website: https://infoexchange.relayhealth.com

Important Notes:

- Updates to the profile on the new EMF will be replicated on the legacy solution. Do not change your password, compression, or report options unless you are prepared for the current solution to be updated as well.

- Data is distributed to both solutions (new and legacy). Uploading a file will generate response files to both the legacy and the new solutions.

- Reports on the new solution are not being actively downloaded at the same time as the legacy system. Users will see reports from the last 24 hours within the outbound directory in the new solution; therefore, the first time you log on, you will need to delete or archive any reports retrieved from the legacy solution prior to that time. The reports received from the previous 14 days will be located in the archive directory, available for download.

- The new .jar file works best with Java 1.6 or newer

All customers will be required to transition over to the new solution over the next few months with a projected end date of November 1, 2014. There are many added benefits to the new solution so RelayHealth recommends you transition over as soon as possible to take advantage of the new functionality.

Downloading the new .jar file prior to March 2, 2015

If you are performing this procedure after March 2, 2015, RelayHealth has already migrated your account. In this case, follow the instructions at "Downloading the new .jar file after March 2, 2015" on page 51.

1. Open an Internet browser and go to https://infoexchange.relayhealth.com.

2. Log in using your RelayHealth EMF login and password.

Figure 39. RelayHealth Login screen

3. After logging in, click the "Profile" section on the top tool bar.

Figure 40. Migration Status

4. Click Complete Migration and confirm.

Figure 41. Migration confirmed

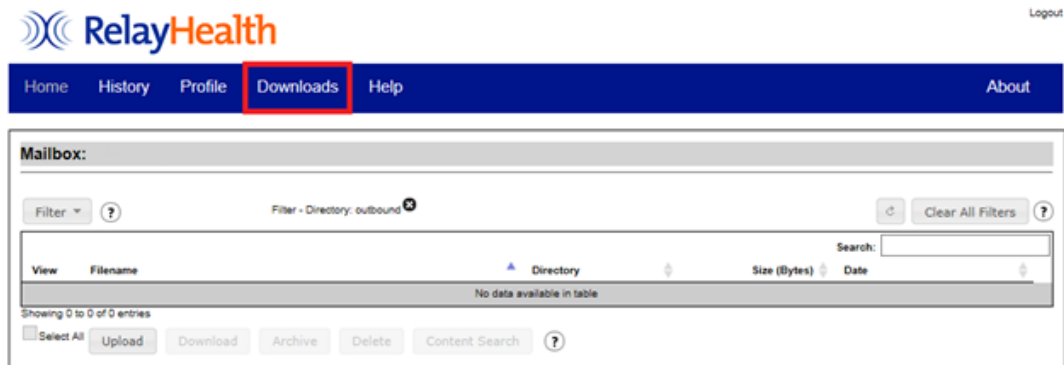5. After confirming your EMF migration, click the "Downloads" section on the top toolbar.

Figure 42. RelayHealth screen

6. On the Downloads screen, click the file labeled "infoExchangeClient.zip" and click the "Download" button.
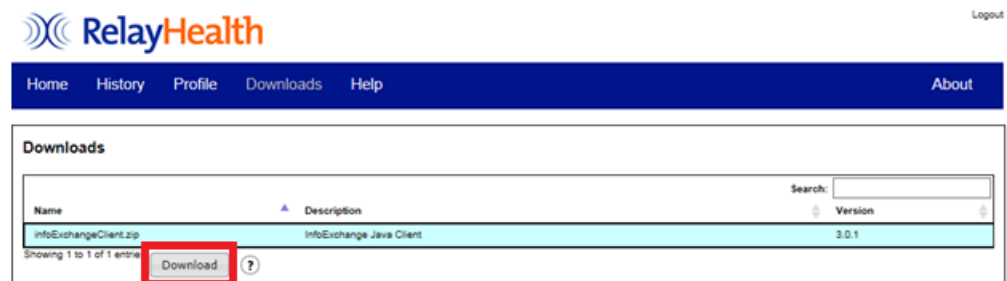

Figure 43. RelayHealth screen

7. Select "Save As" when prompted and save the file somewhere on your local computer.

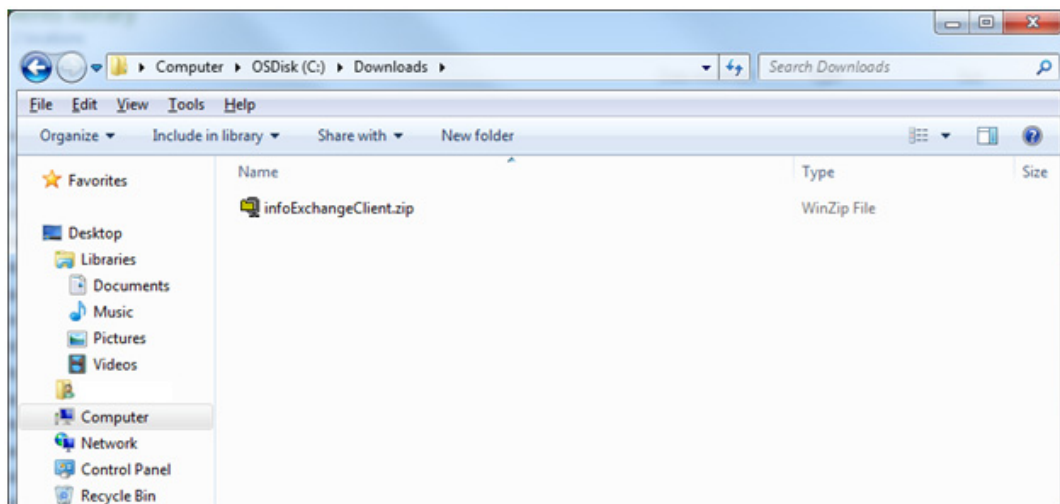8. When the download is finished, browse to the file on your local computer and unzip/extract it.

Figure 44. My Computer screen

9. After unzipping/extracting the file, open the extracted contents and locate the file labeled "infoExchangeClient.jar." Copy this file.
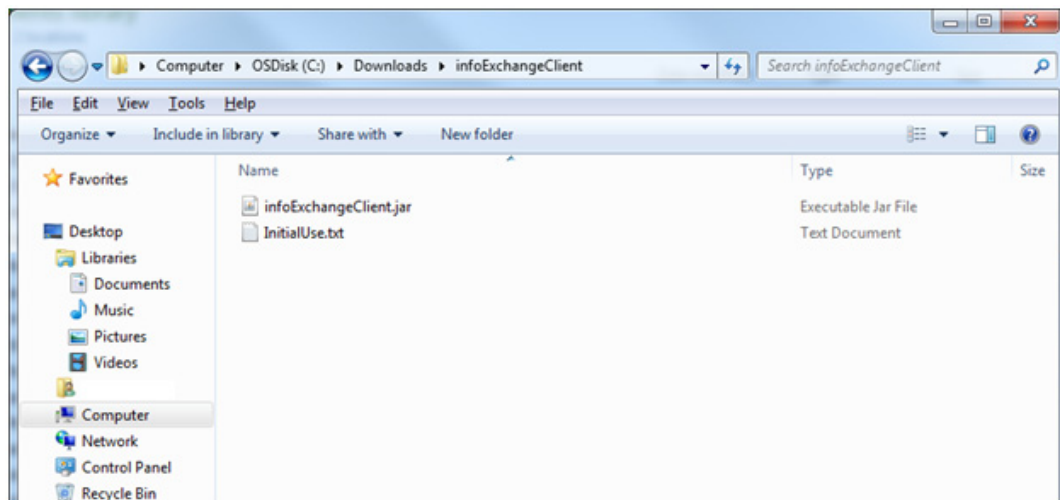
Figure 45. My Computer screen

• For Medisoft users, browse to the following location on your computer:

   C:\Medisoft\Bin\RCM

• For Lytec users, browse to the following location on your computer:

   C:\Program Files (x86)\Lytec 2014\RCM

Note: the above file locations are the default locations. Your files may be located elsewhere.

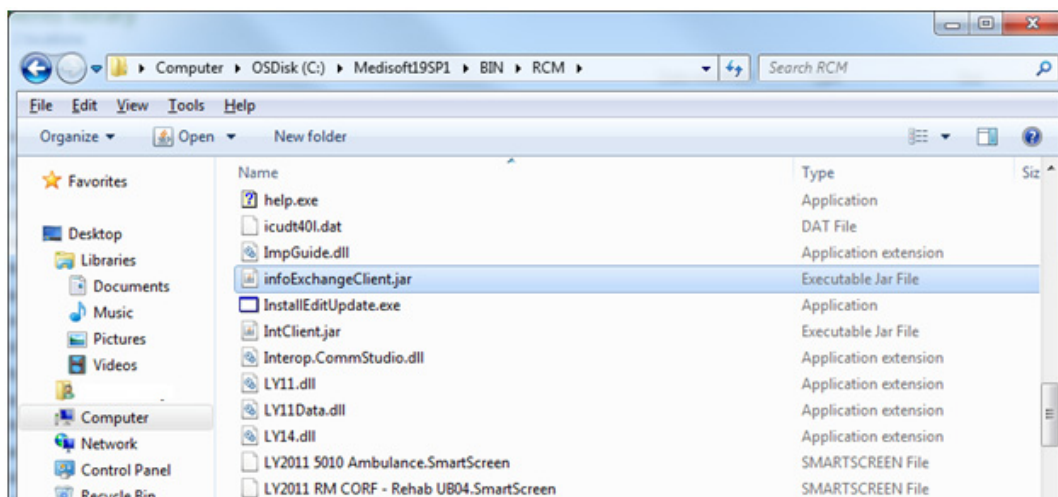10. Inside the RCM folder, locate and delete the existing "infoExchangeClient.jar" file in this folder.

Figure 46. My Computer screen

11. Paste the new "infoExchangeClient.jar" you copied earlier into the RCM folder.

12. The new and updated infoExchangeClient.jar file is ready for use by Revenue Management.

Adding the new EMF mailbox URL to Revenue Management

1. Open Revenue Management from inside Medisoft or Lytec.

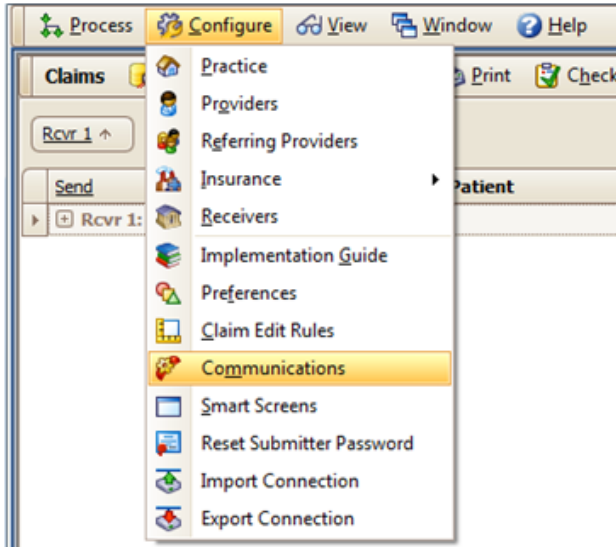2. Click "Configure" > "Communications" in the top toolbar.

Figure 47. Configure menu

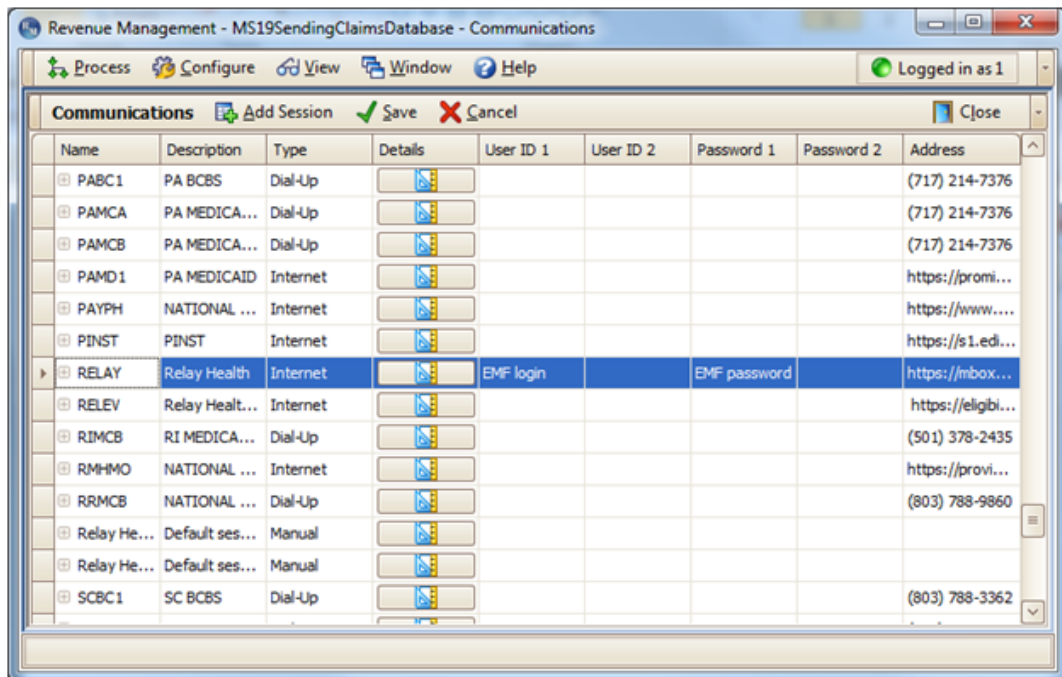3. Locate the communication session labeled "RELAY."

Figure 48. Communications screen

---

4. Click the "Details" button (Blue triangle with ruler).

5. Delete the existing URL that's entered for the RELAY session and enter the new URL:

   https://infoexchange.relayhealth.com

   IMPORTANT: You must use "https"! "Http" alone will not work.
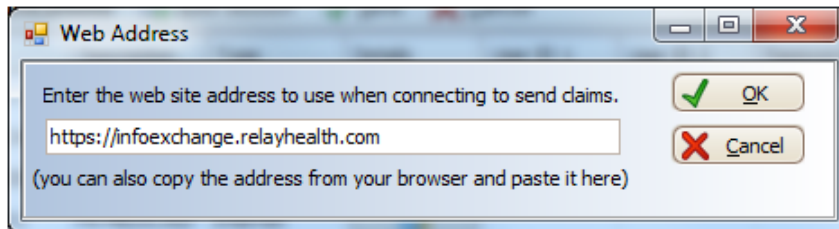

Figure 49. Web Address screen

6. Click the "OK" button to store your newly changed URL for your RELAY session.

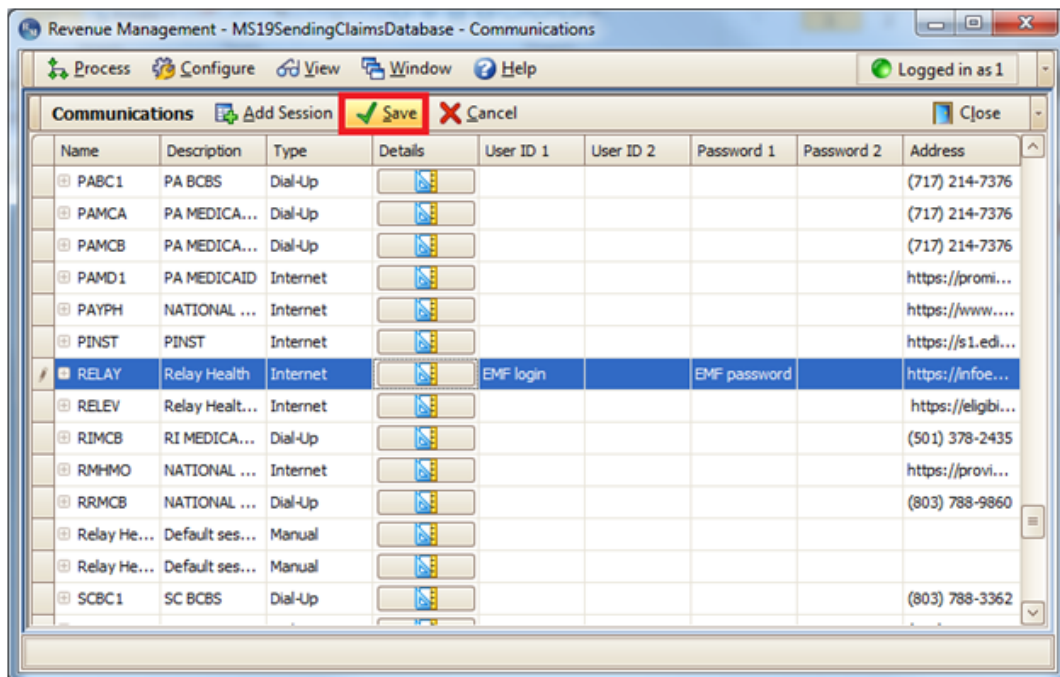7. Click the "Save" button near the top to save your communication session changes.

Figure 50. Communications screen

If you have more than one RELAY session (E.g.: Multiple practices, billing services, etc.), you will need to make the same URL change to **ALL** of your RELAY sessions.

Your RELAY communication session is now ready for use by Revenue Management.

Downloading the new .jar file after March 2, 2015

If RelayHealth has already migrated your account on or after March 2nd, 2015, you will need to follow these instructions.

1. Open an Internet browser and go to https://infoexchange.relayhealth.com.

2. Log in using your RelayHealth EMF login and password.

Figure 51. RelayHealth Login screen

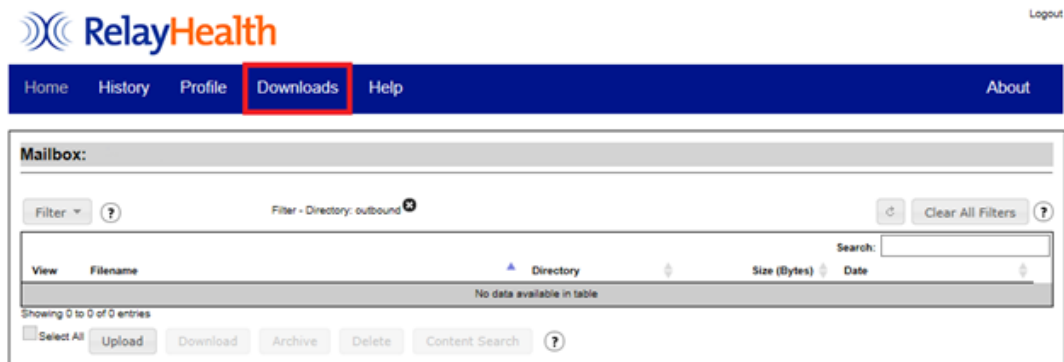3. After logging in, click the "Downloads" section on the top toolbar.

Figure 52. RelayHealth screen

4. On the Downloads screen, click the file labeled "infoExchangeClient.zip" and click the "Download" button.
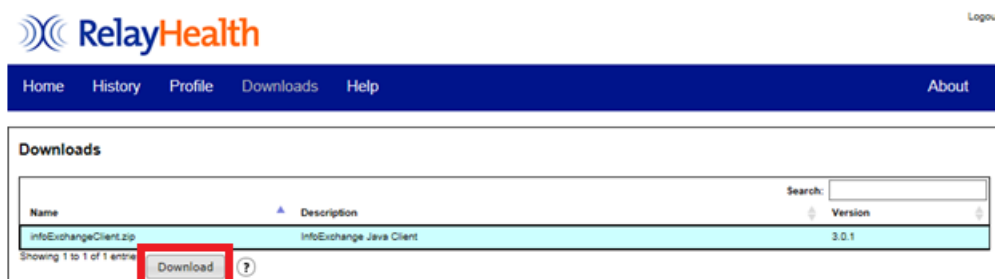

Figure 53. RelayHealth screen

5. Select "Save As" when prompted and save the file somewhere on your local computer.

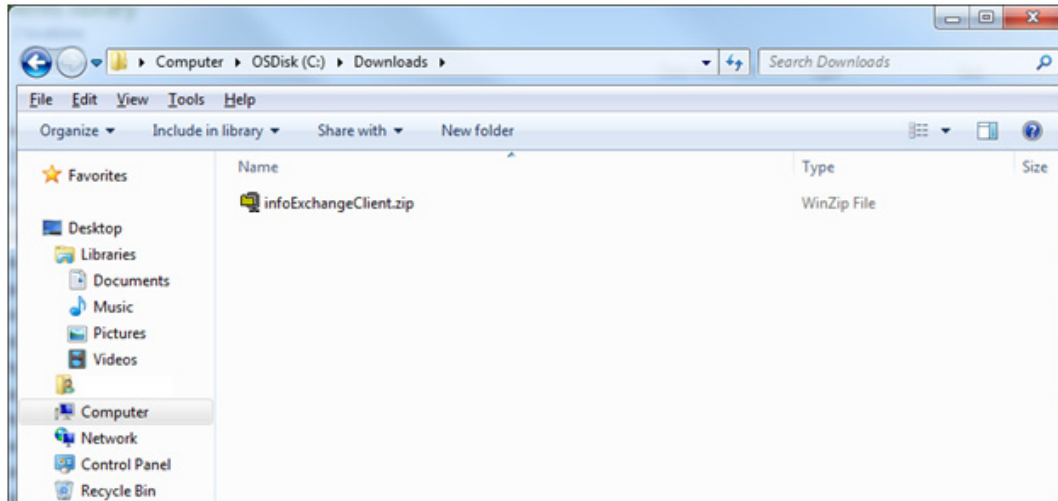6. When the download is finished, browse to the file on your local computer and unzip/extract it.

Figure 54. My Computer screen

7. After unzipping/extracting the file, open the extracted contents and locate the file labeled "infoExchangeClient.jar." Copy this file.
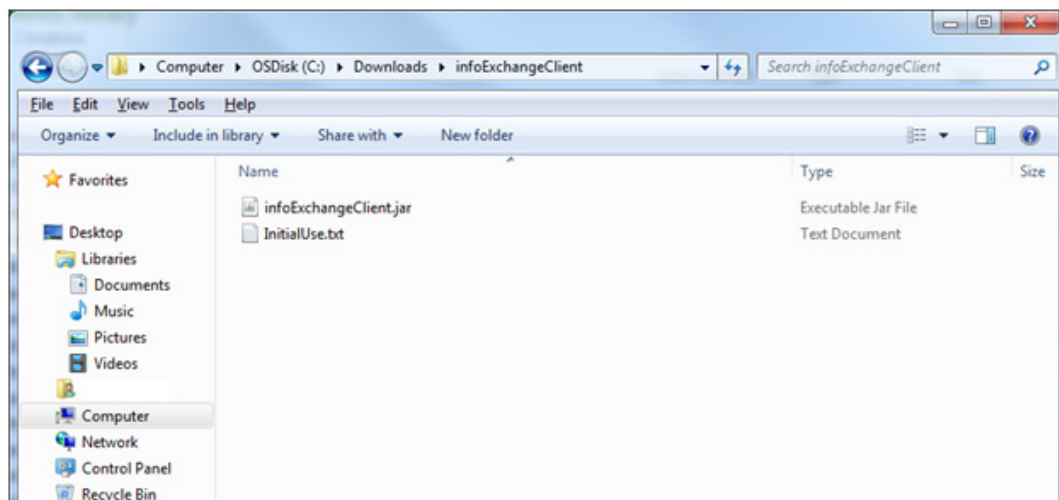

Figure 55. My Computer screen

- For Medisoft users, browse to the following location on your computer:

    C:\Medisoft\Bin\RCM

- For Lytec users, browse to the following location on your computer:

    C:\Program Files (x86)\Lytec 2014\RCM

Note: the above file locations are the default locations. Your files may be located elsewhere.

8. Inside the RCM folder, locate and delete the existing "infoExchangeClient.jar" file in this folder.
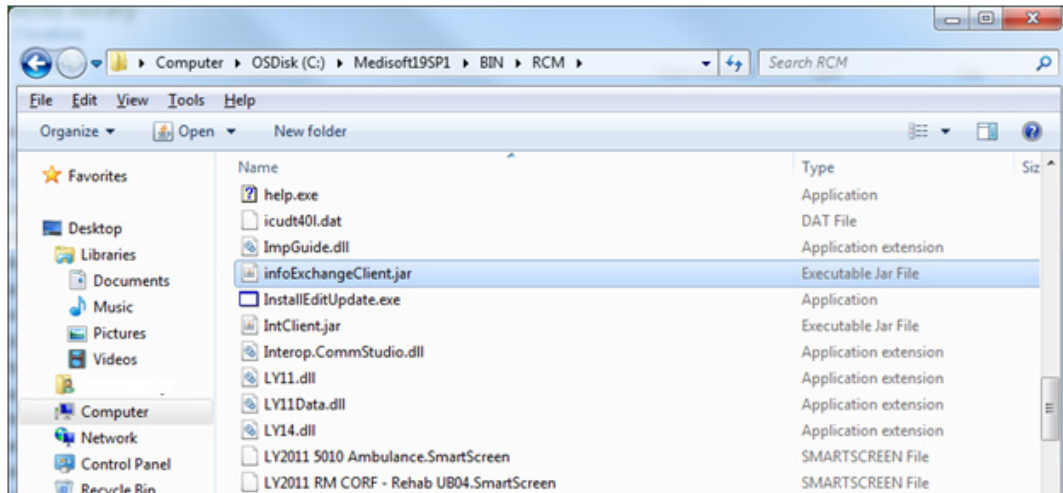

Figure 56. My Computer screen

9. Paste the new "infoExchangeClient.jar" you copied earlier into the RCM folder.

10. The new and updated infoExchangeClient.jar file is ready for use by Revenue Management.

Adding the new EMF mailbox URL to Revenue Management

1. Open Revenue Management from inside Medisoft or Lytec.

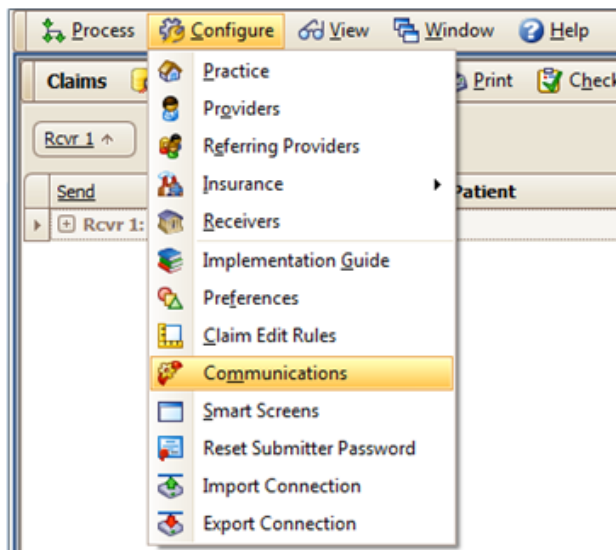2. Click "Configure" > "Communications" in the top toolbar.

Figure 57. Configure menu

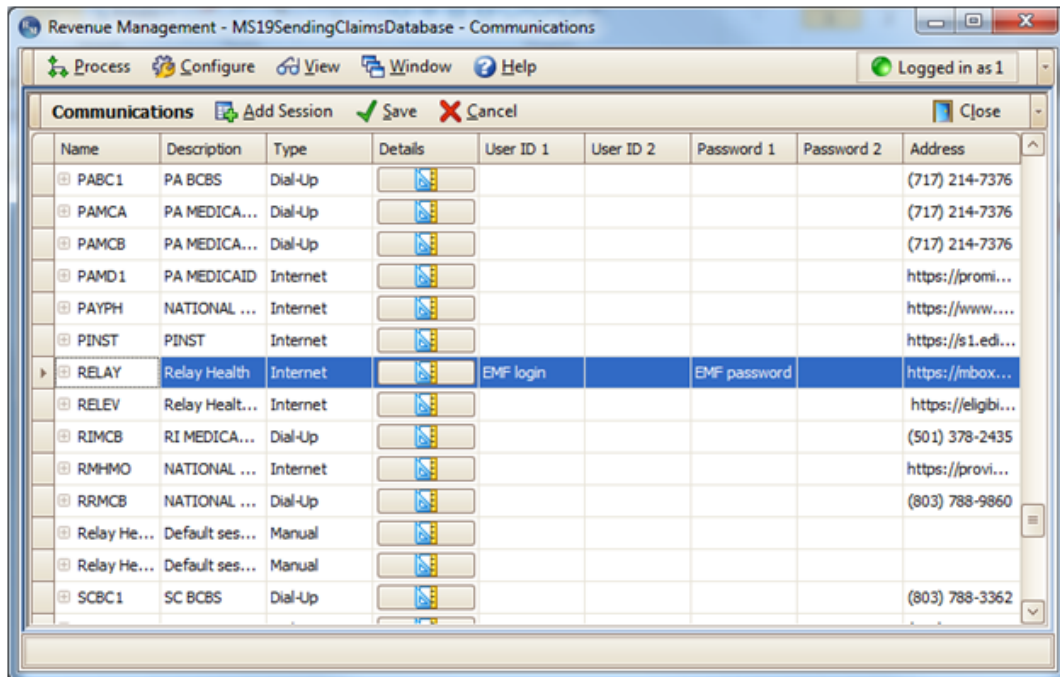3. Locate the communication session labeled "RELAY."

Figure 58. Communications screen

4. Click the "Details" button (Blue triangle with ruler).

5. Delete the existing URL that's entered for the RELAY session and enter the new URL:

https://infoexchange.relayhealth.com

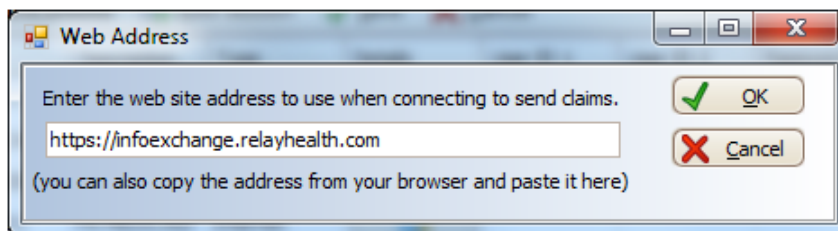IMPORTANT: You must use "https"! "Http" alone will not work.

Figure 59. Web Address screen

6. Click the "OK" button to store your newly changed URL for your RELAY session.

7. Click the "Save" button near the top to save your communication session changes.
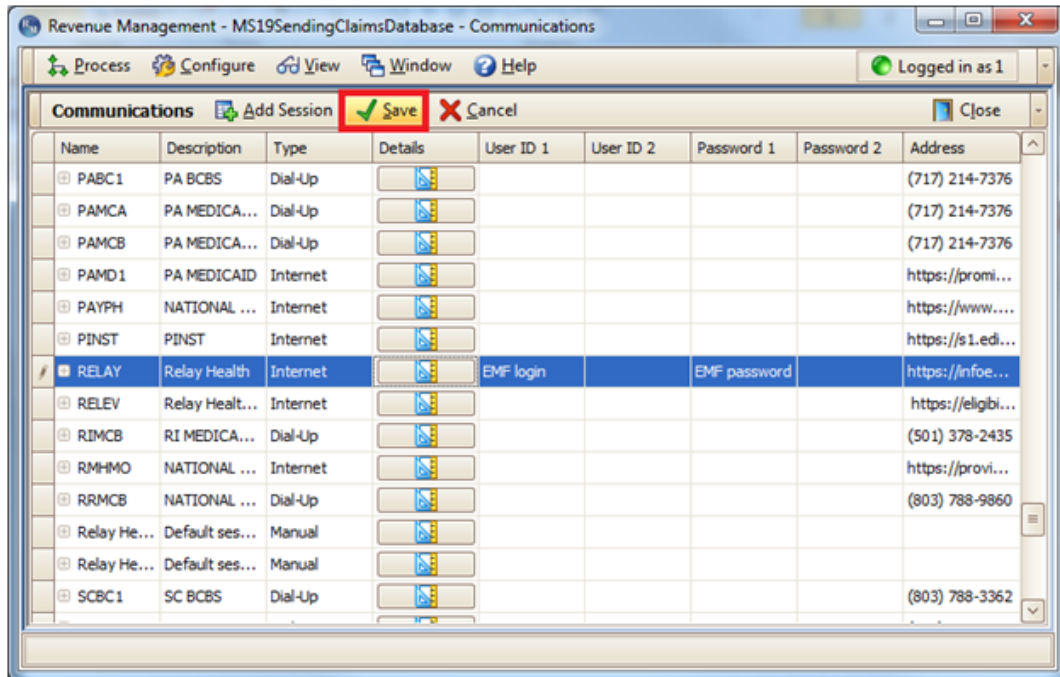

Figure 60. Communications screen

If you have more than one RELAY session (E.g.: Multiple practices, billing services, etc.), you will need to make the same URL change to **ALL** of your RELAY sessions.

Your RELAY communication session is now ready for use by Revenue Management.