

Physician Practice Solutions



**Medisoft 18 Service Pack 2
Release Notes**

Beta Version

March 2013

Produced in Cork, Ireland

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Chapter 1 - Enhancements

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

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Create Patient Statements in Office Hours

You can now create and print patient/guarantor statements in Office Hours. You can use the Quick Balance screen in Office Hours in the same way as you use it in Medisoft, with all of the same functionality.

Quick Balance screen

New Buttons

New buttons on the Quick Balance screen in Office Hours enable you to view statements and print statements with the same functionality as Medisoft.

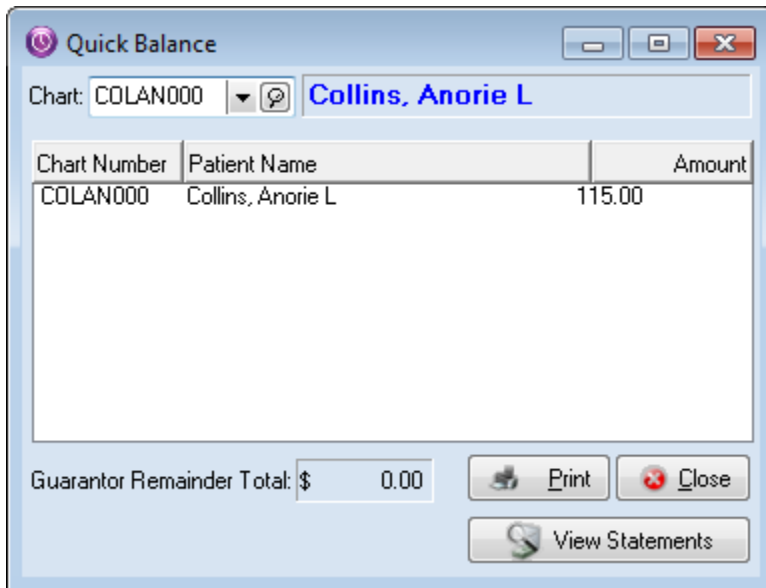


Figure 1. Quick Balance screen

Previously, clicking Print displayed the Open Report screen on which you selected a report format. Now, clicking Print will display the following screens depending on the situation:

Situation	Result
If the patient/guarantor has an existing statement and no new charges	the Print Statement screen appears for the selected patient.
If there are new charges for the patient/guarantor	the Create Statements screen will appear. For more information on this screen, see "Create Statements screen" on page 2.
If the patient/guarantor has no balance or no cases	you will receive a message saying there are no statements to print or there are no cases.

Clicking View Statements will open the BillFlash web page if you are signed up with BillFlash.

Create Statements screen

The Create Statements screen is now available in Office Hours. Previously, it was only available in Medisoft. If the patient/guarantor has charges but no statements, the Create Statements screen will appear when you click Print on the Quick Balance screen. Select your Statement Type and click Create to create a new statement for the selected patient/guarantor.

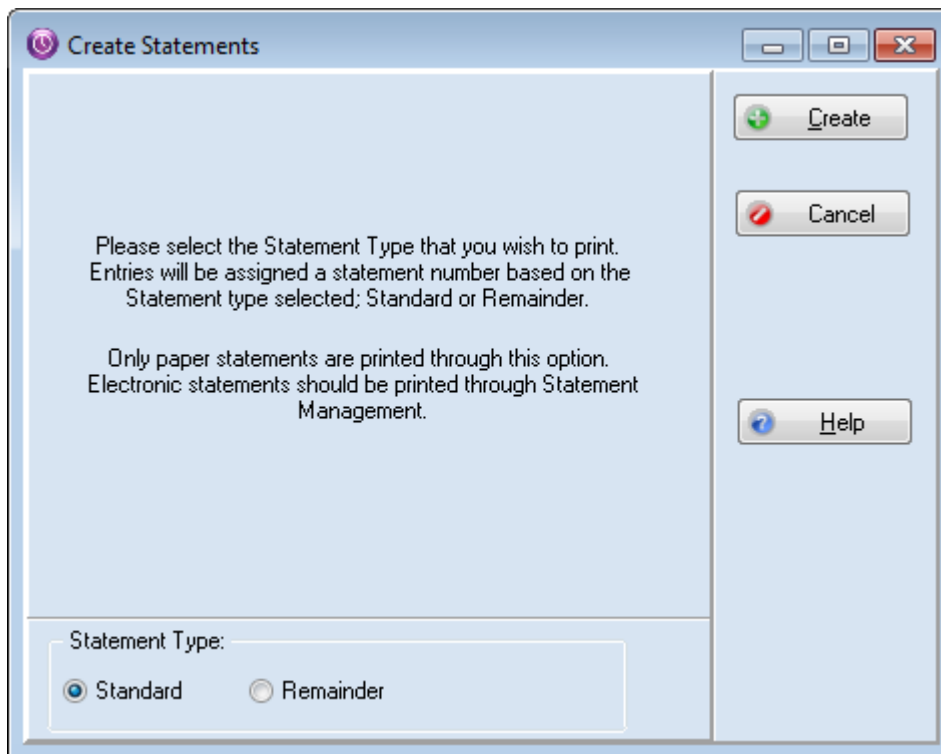


Figure 2. Create Statements screen in Office Hours

Print Statement screen

When a statement exists for a patient/guarantor, clicking the Print button will display the Print Statement screen, just as in Medisoft. The statement method comes from the patient's record and you can select if you want to exclude billed and paid transactions. In addition, select the Update Statement Management check box if you want to update the billing status of the statements that are being printed.

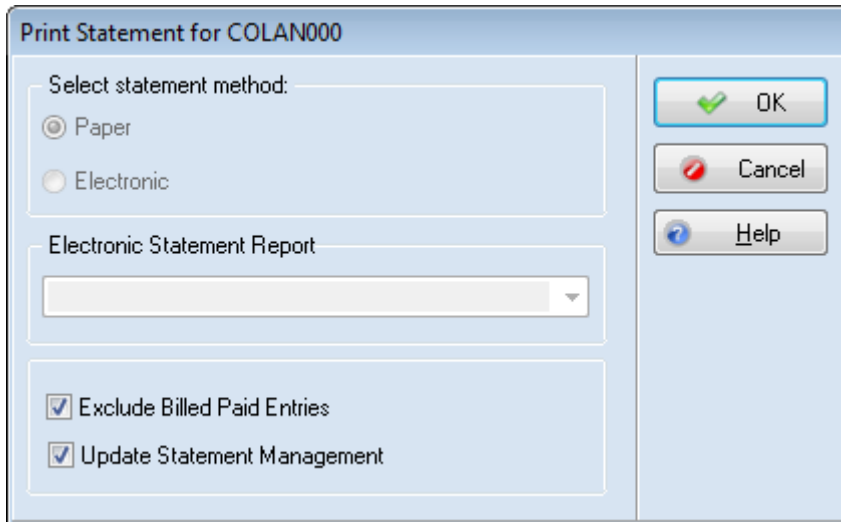


Figure 3. Print statement screen in Office Hours

Patient Payment Plan screen

Clicking SHIFT + F5 with the focus in the Chart field on the Quick Balance screen will display the Patient Payment Plan screen. You can use this screen as a reference to see when the patient should be billed and how much the patient will be billed. Previously, this feature was only available from the Quick Balance screen in Medisoft.

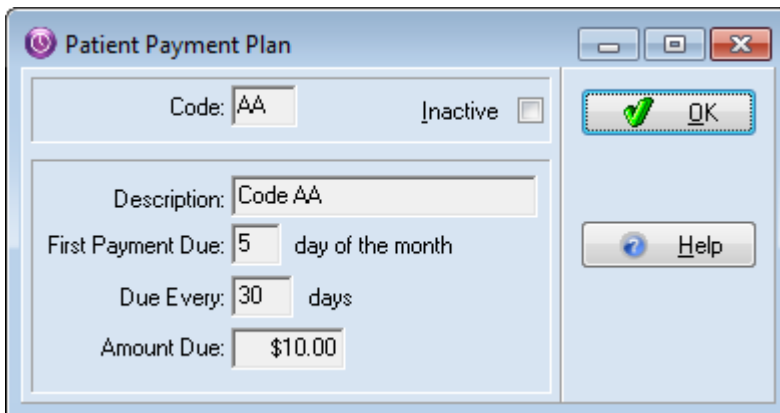


Figure 4. Patient Payment Plan screen in Office Hours

Create Statements for Guarantors with no Case

You can now create and print statements for guarantors who do not have a case associated with their records. Patients with the guarantor assigned will have their accounts printed with the guarantor statement.

Integration with Mobile Devices

This feature is available only for Medisoft Network Professional.

You can integrate mobile devices with Medisoft. From the mobile device, you can view appointments, enter charges, and update superbill templates for use with the Enter Charges feature.

Features of the Mobile Application

Using the mobile application, you can

- View appointments. Tapping the Schedule icon will show you a list of appointments. You can select a day or a week. Tapping an appointment will show you patient detail, including patient balances. You can also see multiple providers in a single view. However, you will be able to see a Day view only.
- Enter charges. Tapping Charges will show you a list of procedures and diagnosis codes. You can select a patient and facility, specify if it is a new or existing appointment, specify the procedures and diagnosis codes, and submit the charges. You can also enter notes for the charges from your mobile device. In Medisoft, these charges will appear in Unprocessed EMR Charges.

The green check mark that appears next to the patient's name for their appointment on the Schedule page after you submit charges is device-specific. That is, it will appear only on the device where the charges were submitted, even if you are logged in as the same provider on both devices.

- Update Superbill Templates. Tapping Setup will allow you to update the template you use for entering charges on your mobile device. You can create multiple templates and decide if the superbill should be viewed in Portrait or Landscape on your mobile device.

Supported Mobile Devices

You can use the following devices for integration with Medisoft:

- iPad (with iOS 5 and above)
- iPhone 4 (with iOS 5 and above)
- iPod Touch (with iOS 5 and above)
- iPad Mini

Here is a sample of the Scheduling screen from an iPad:

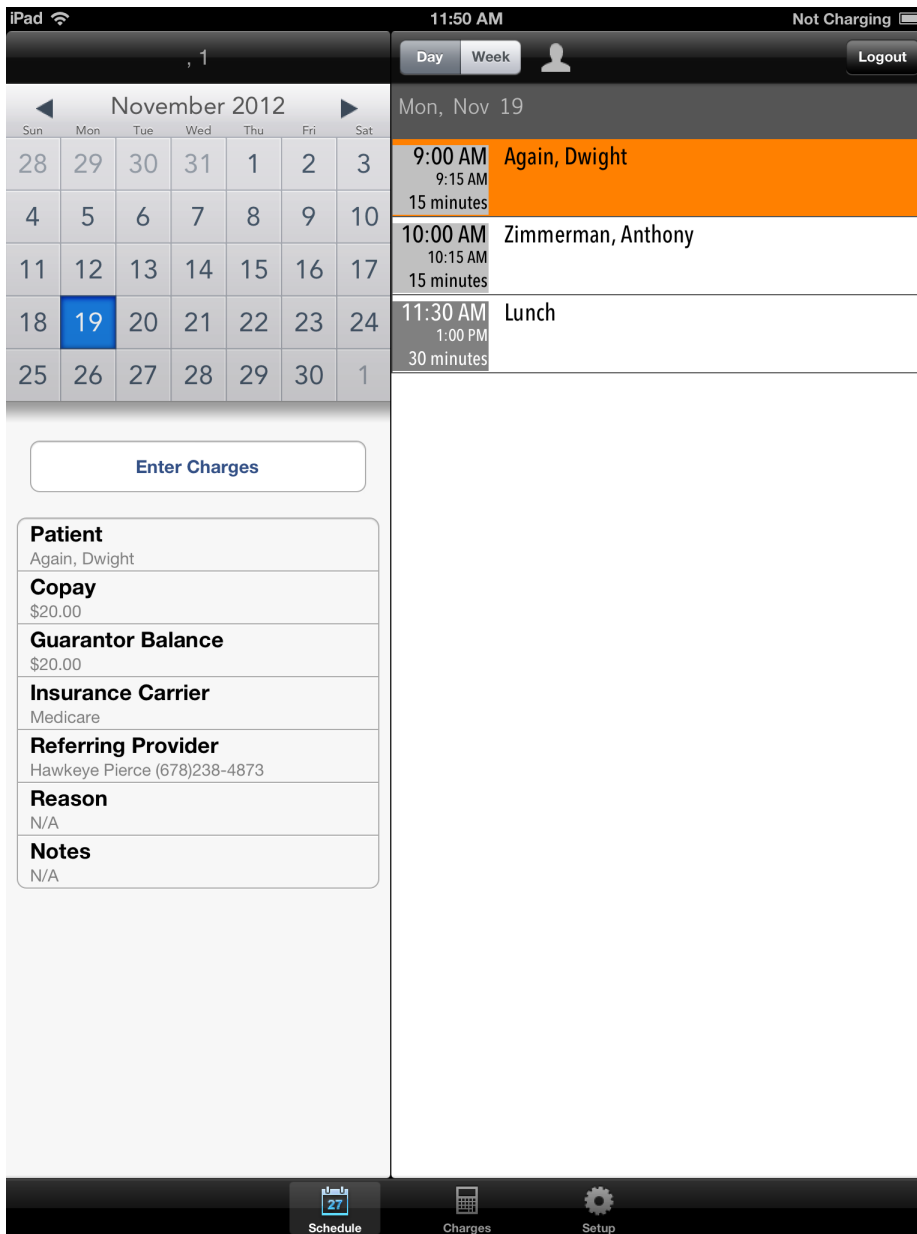


Figure 5. Scheduling screen on an iPad

Here is a sample of the Scheduling screen on an iPhone.

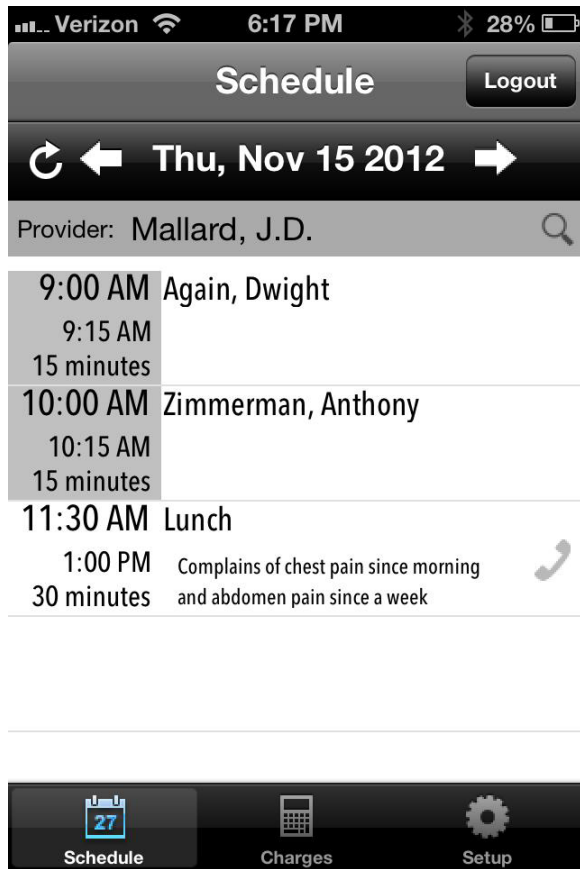


Figure 6. Scheduling screen on an iPhone

Installation

All of the files and programs for the mobile service were installed automatically on your desktop when you installed Medisoft. These files and programs make it possible for a mobile device to access your practice data.

Configuring the Mobile Device

Configure your mobile device before you use it to access information from your practice. Steps for configuring your mobile device are found in the Medisoft Installation Guide available on your Medisoft DVD. You can also find the Installation guides here

For Customers	https://mckwiki.mckesson.com/pps-customer-central/Medisoft%20Documentation
For Value-Added Resellers	https://mckwiki.mckesson.com/pps-var-central/Medisoft%20Documentation

Select the link for Medisoft 18 SP2 documentation.

For each practice that you have, you will need to configure the device separately, since the API key and API Code are different for each practice.

New Menu Option

On the Help menu in Medisoft, there is a new option: Mobile. Selecting this option will show you the User API Key and API Code assigned when you installed Medisoft. You will use these to link your mobile device to Medisoft after you download and install the mobile application from the Apple App Store.

You can check the connection to the server by clicking Check Access.

This screen will also show the Mobile PIN number of the logged in user. For more information on the Mobile PIN number, see [“Unprocessed Transactions Edit screen” on page 9](#).

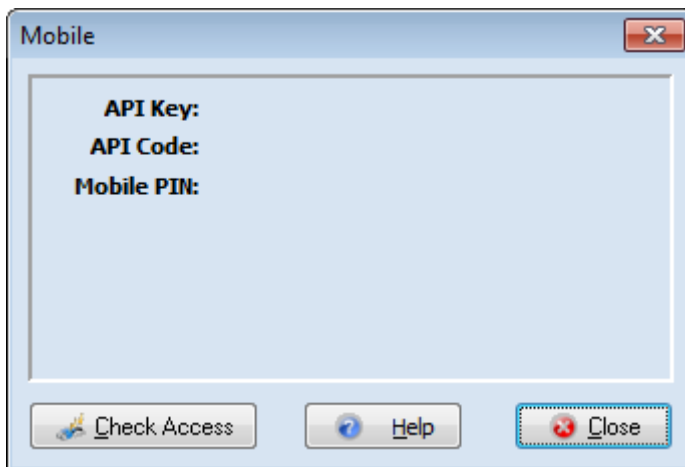


Figure 7. Mobile screen

New Security Option

You can control which users have access to mobile functionality with a new security permission. The default is set to Level 1 so only the system administrator or other Level 1 users can log in from

a mobile device. If you want other users to be able to log in from a mobile device, adjust their personal access level or change this security permission to include other levels.

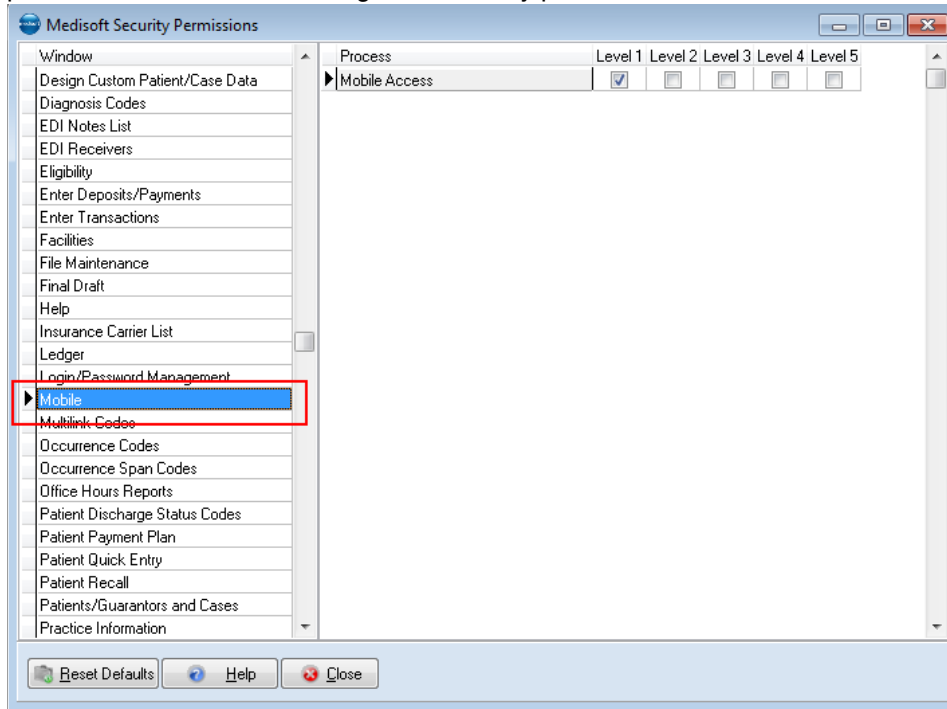


Figure 8. Medisoft Security Permissions screen

Unprocessed Charges screen

New Column

A new, unlabeled column (Mobile Notes) on the Unprocessed Charges screen shows if the charges that were sent from your mobile device have notes/text attached to them. An icon in the column shows if there is a note. This column functions in the same manner as the corresponding column in Transaction Entry. Text notes that come from the mobile device will appear in the first

transaction line, with multiple notes part of the same line. You can view these notes from the Unprocessed Charged Edit screen.

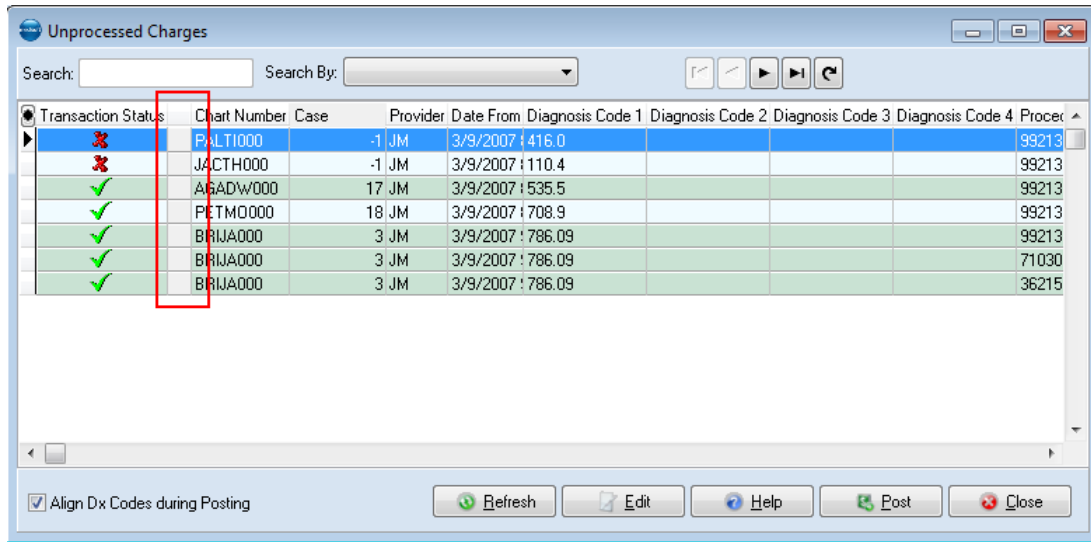


Figure 9. Unprocessed Charges screen with Note column

Note: if a note arrives in Unprocessed Charges without a procedure code, you must add one to the transaction before you can post it.

You can access and view notes that come from your mobile device on the Unprocessed Transactions Edit screen. The paper icon in the column indicates that a note exists. Click Note to view the message.

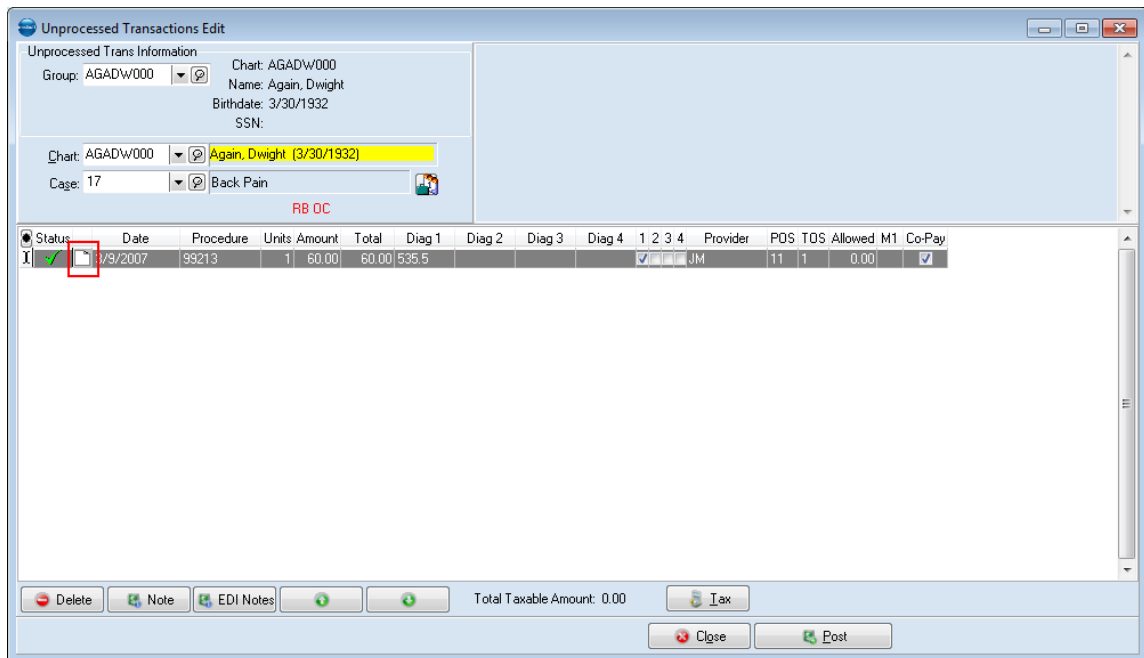
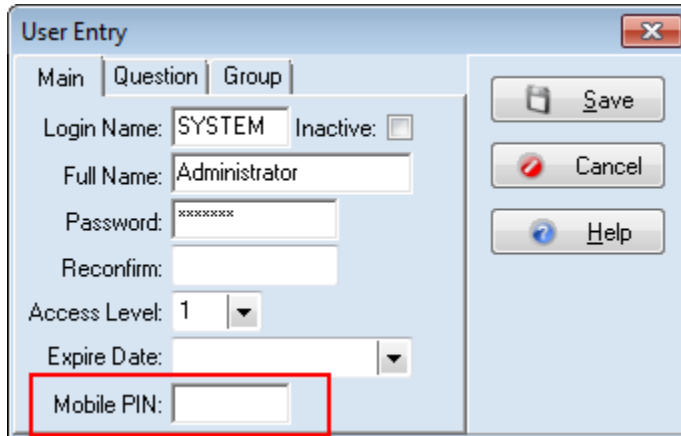


Figure 10. Unprocessed Transactions Edit screen

Security Setup System screen

New Field

There is a new field on the Security Setup System screen for a PIN number. You can create the Mobile PIN number here or create it the first time you log into the practice from the mobile device. You'll use the Mobile PIN number to access the practice from the mobile device if the application gets locked on the mobile device.



The image shows a 'User Entry' dialog box with a light blue background. It has three tabs: 'Main', 'Question', and 'Group'. The 'Main' tab is selected. On the right side, there are three buttons: 'Save', 'Cancel', and 'Help'. The form fields are as follows: 'Login Name' is 'SYSTEM' with an 'Inactive' checkbox; 'Full Name' is 'Administrator'; 'Password' is masked with asterisks; 'Reconfirm' is empty; 'Access Level' is a dropdown menu set to '1'; 'Expire Date' is a date picker; and 'Mobile PIN' is an empty text field highlighted with a red rectangular border.

Figure 11. Security Setup System screen

Depending on the user's security level, this field may be disabled.

The Mobile PIN number must be four digits.

New Diagnose Mobile screen

The Diagnose Mobile screen gives you information on the status of the Mobile Service, as well as information for the ports that it is using to communicate. In addition, you can see the version of the service. If you are having trouble with your mobile device, use this screen to help identify the issue.

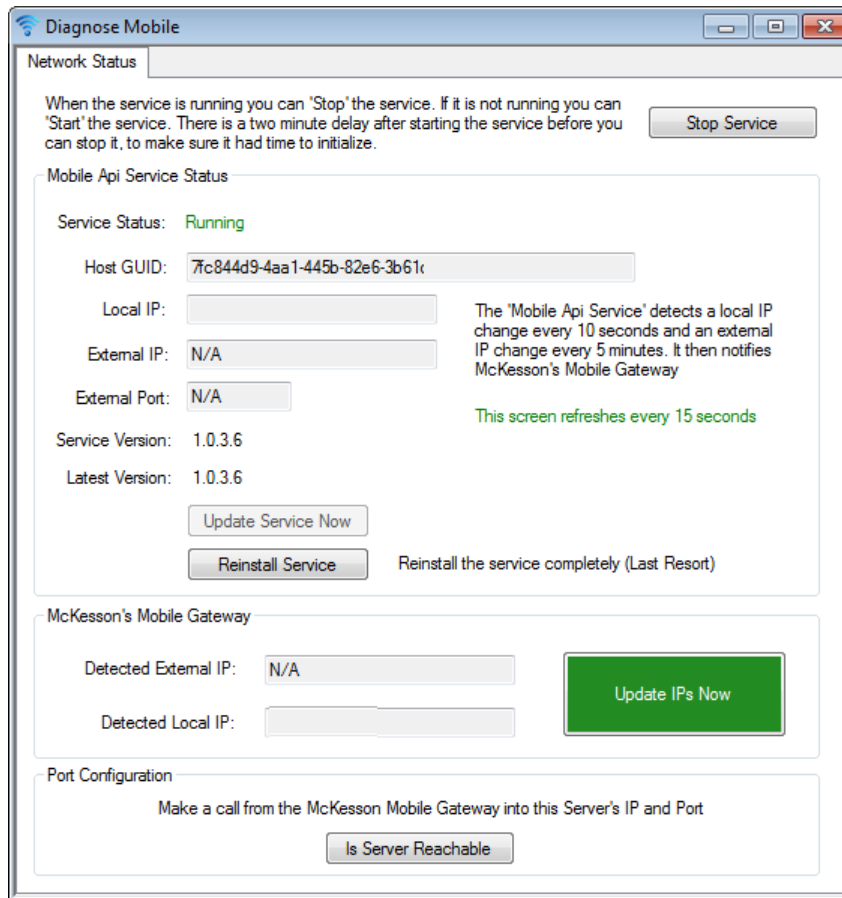


Figure 12. Diagnose Mobile screen

Chapter 2 - Resolved Issues

The following issues were resolved with Medisoft Release 18 SP2.

TD	Application	Description
22961	Core	<p>You can now restore a backup that was password protected. Previously, Medisoft would not restore any backup that was password protected.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none">1. In Medisoft, on the File menu, point to Backup, and click Backup Data.2. Click OK on the warning screen. The Medisoft Backup screen appears.3. Enter a name and location for the backup.4. Enter a password.5. Click OK.6. Re-enter the password and click OK.7. Click Start Backup.8. Click OK on the message that the backup is complete.9. Close the Medisoft Backup screen.10. On the File menu, point to Restore, and click Restore Data.11. Click OK on the warning message. The Medisoft Restore screen appears.12. Select the backup you just created.13. Enter the password.14. Click Start Restore.15. Verify that the backup is restored without any errors.

22976	Core	<p>The balance on the Quick Balance screen will now correctly include Copays and show the correct balance. Previously, in certain situations, such as a partial insurance payment and a copay, the balance would be incorrect.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none">1. On the File menu in Medisoft, click Program Options. The Program Options screen appears.2. Select the Billing tab.3. Select the Add Copay's to Remainder Statements check box.4. Click Save.5. Create a new patient and a new case for the patient.6. Select an insurance carrier on the Policy 1 tab in case entry.7. Select the Assignment of Benefits/Accept Assignment check box.8. Enter an amount in the Copay Amount field.9. Enter a transaction for the patient and case and pay the copay. Note the amount of the charge.10. Post a payment from the insurance carrier and leave a balance for the patient.11. On the Activities menu, click Quick Balance. The Quick Balance screen appears.12. Select the patient.13. Verify that the balance is correct. The copay and insurance amount paid are subtracted from the charge.
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23016	Core	<p>You will no longer receive an error when you enter additional charges for a patient who has a printed superbill and both Force Document Number and User Serialized Superbills selected in Program Options.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. On the File menu in Medisoft, click Program Options. The Program Options screen appears. 2. Click Data Entry. 3. Select the check boxes for Force Document Number and Use Serialized Superbills. 4. Click Save. 5. On the Activities menu, click Appointment Book. The Appointment grid appears. 6. Right-click an appointment and click Print Superbills. The Open Report screen appears. 7. Click OK. 8. Select either the preview option or the print option. 9. Click Start. The Data Selection Questions screen appears. 10. Make your selections and click OK. 11. On the Activities menu in Medisoft, click Enter Transactions. 12. Select a patient who had a superbill printed. 13. Verify that the superbill number appears in the Superbill field. 14. Click the New button to begin entering a new transaction. 15. Verify that you can enter new transactions without any error message.
23017	Core	<p>Tabbing out of the Transaction Entry grid will no longer cause unsaved transaction lines to clear.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. On the Activities menu, click Enter Transactions. 2. Select a Chart and Case. 3. In the Charges section, click New. 4. Enter transaction lines. 5. Press Tab until the focus is no longer on the grid. 6. Verify that the unsaved transaction lines are still present.

23020	Office Hours	<p>Office Hours will no longer display a list of all cases for all patients after the following steps are taken: click the magnifying glass on the Case field of the New or Edit Appointment screen and click Cancel on the Case Search Window screen.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. On the Activities menu in Medisoft, click Appointment Book. The Appointment grid appears. 2. Highlight an appointment and right-click. 3. Click Edit. The Edit Appointment screen appears. 4. Click the magnifying glass on the Case field. The Case Search Window screen appears. 5. Click Cancel. 6. Click the drop-down arrow on the Case field. 7. Verify that only cases for the selected patient appear.
23028	Core	<p>Medisoft will no longer create two lines on a statement when you have a dependent and a guarantor with balances and create a statement.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. Create a patient and guarantor for the patient. 2. Create a case and enter transactions for the patient. 3. Press F11. The Quick Balance screen appears. 4. Select the patient. 5. Follow the steps to print a statement. 6. Verify that there is only one line of information.
23033	Office Hours	<p>Superbills will no longer duplicate with the same number. Previously, you could get duplicate superbill numbers if more than one workstation was used to print superbills.</p> <p><u>Steps to recreate</u></p> <p>In Office Hours, have two users attempt to print superbills at the same time, using these steps:</p> <ol style="list-style-type: none"> 1. On the Appointment grid, right-click and select Print Superbills. 2. Follow the steps to print the superbills. 3. Verify that the superbill numbers are different.

23134	Core	<p>You will no longer receive an error 5177 when removing any custom patient or case fields from the Custom Data Field List when auditing is enabled for custom patient or custom case data.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. On the File menu, select Program Options. The Program Options screen appears. 2. Click the Audit tab. The Audit tab appears. 3. Select Check All. 4. Click Save. 5. On the Tools menu, click Design Custom Patient Data. The Custom Patient Designer appears. 6. On the View menu, click Custom Datafield List. The Custom Data Field List appears. 7. Highlight TPLB. 8. Click Delete. 9. Click Yes on the warning message. 10. Click Close. 11. Verify that there is no error.
23137	Core	<p>Quick Balance will now calculate balances correctly for patients with multiple cases and different guarantors. Previously, the balances would be incorrect.</p> <p><u>Steps to recreate</u></p> <ol style="list-style-type: none"> 1. In Medisoft, create a patient and create different cases with different guarantors. 2. Enter transactions for the patient for each case. 3. On the Activities menu, click Quick Balance. 4. Select the patient. 5. Select the appropriate case. 6. Verify that the balance is correct. 7. Select the other case. 8. Verify that the balance for that guarantor is correct.

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