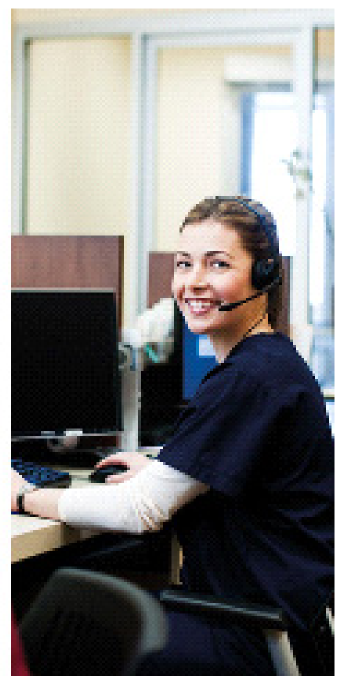
MCKESSON

Medisoft

Release Notes

Business Performance Services
February 2015



Produced in Cork, Ireland

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CONNECTIVITY

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Chapter 1 - Enhancements

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

In this chapter

Medisoft Desktop

After Upgrading from Releases prior to Medisoft 19

Medisoft 19 was the ICD-10 Ready release of Medisoft. Prior to using Medisoft 20, review the Release Notes for Medisoft 19, as they have all of the features that were added to make Medisoft ICD-10 ready. You can find those release notes here: https://socialkb.mckesson.com/var-central/Medisoft%20Product%20Release%20Notes.

Note: You do NOT need to perform the Before or After Install sections in the Medisoft 19 Release Notes.

If you have upgraded from Medisoft 18 or earlier, you must run the Clear ICD-10 utility to ensure that no ICD-9 codes remain in the ICD-10 fields on the Enter Diagnosis screen. For steps to run the utility, see "Running the Clear ICD-10 utility" on page 31.

Patient Intake

Patient Intake is available only in Medisoft Network Professional. You may see an option for this feature in Basic and Advanced but you must have Network Professional to use it.

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 it will be transferred to your core application so that you can update the patient's information.

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

Setting up

Granting permissions

The following permissions are used in the Pending Patient Screen. You must have these permissions to access the Pending Patient screens. If you do not, you will receive a No Access warning and will need to have someone with permission perform a Security Override.

- Patients/Guarantors and Cases - New Patient
- Patients/Guarantors and Cases - Edit Patient
- Patients/Guarantors and Cases - New Case
- Patients/Guarantors and Cases - Edit Case
- Patients/Guarantors and Cases - Copy Case
- Insurance Carrier List - New Insurance Carrier
- Insurance Carrier List - Edit Insurance Carrier
- Addresses - New Address Entry
- Addresses - Edit Address Entry

- Referring Providers - New Referring Provider
- Referring Providers - Edit Referring Provider
- Provider List - New Provider
- Provider List - Edit Provider

If you have your Program Options set to Use Patient Quick Entry for New/Edit, you must have the following permission set to True:

- Patient Quick Entry - New/Edit

To delete a patient from the Pending Patients list, you must have permission to delete patients.

New Menu Option

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

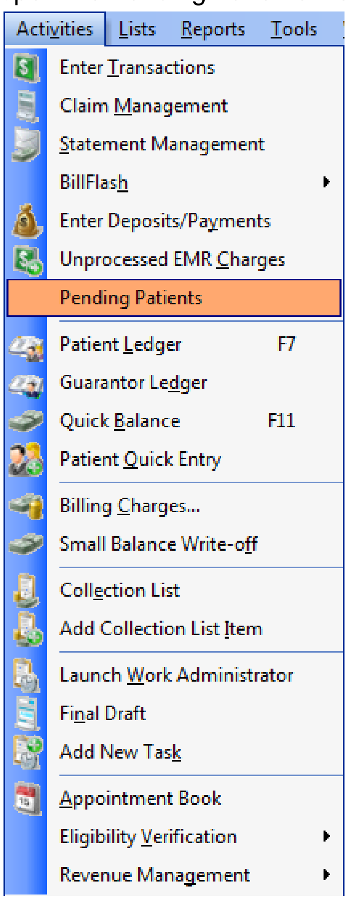


Figure 1. Activities menu

New Pending Patient List

This screen will show you all of the patients who have entered information from a mobile device, and whose information you have not processed. No information is saved on the mobile device.

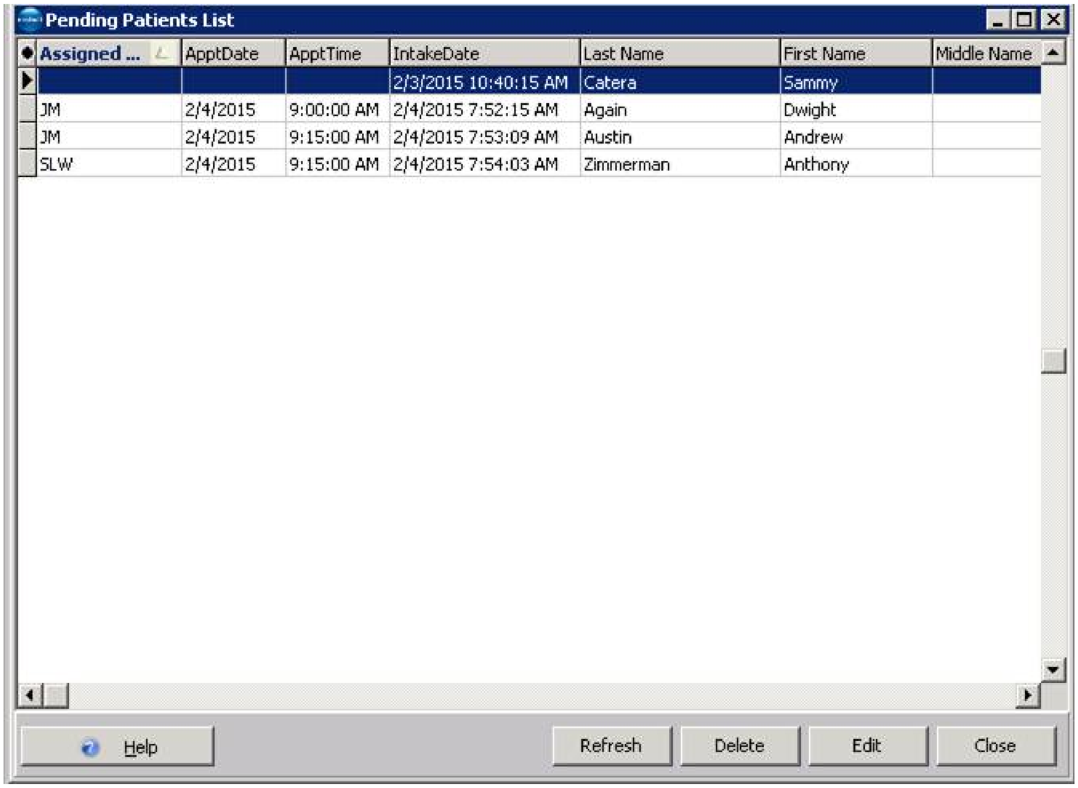


Figure 2. Pending Patients List

Clicking Edit or double-clicking a line item will open the Pending Patients screen. 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.

Note that the provider information that appears is the provider that the patient is scheduled to see, not the assigned provider.

IntakeDate field

An IntakeDate field has been added to the Pending Patient table (MWMPP). It includes the date and time that the intake record was added. This field will not appear on the grid by default.

To add this field to the grid:

1. Click the black dot in the upper left hand corner of the Pending Patient grid. The Grid Columns screen appears.
2. Click the **Add Field** button.
3. Scroll down to IntakeDate and click the **OK** button,
4. Move the field to the place you want it to appear on the grid.

Note: if you are using the Demo version of Medisoft, this screen will not be available.

New Grid Columns screen

The Pending Patient list is customizable. Click the black dot to the left of Assigned Provider in the grid heading to open the Grid Columns screen.

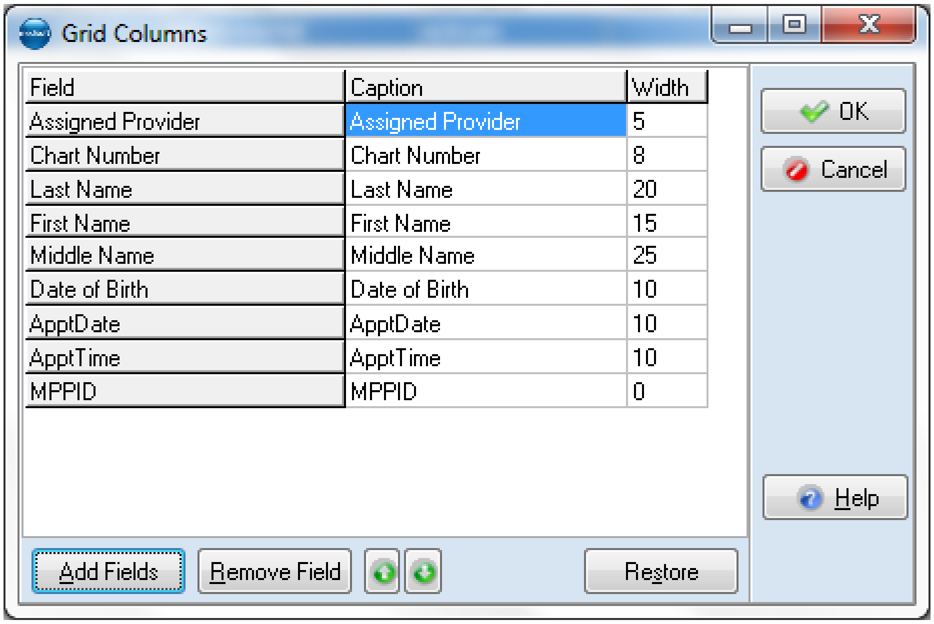


Figure 3. Grid Columns screen

You can use this screen to add or remove columns from the list, as well as change the order of the columns.

New Pending Patients screen

The Pending 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.

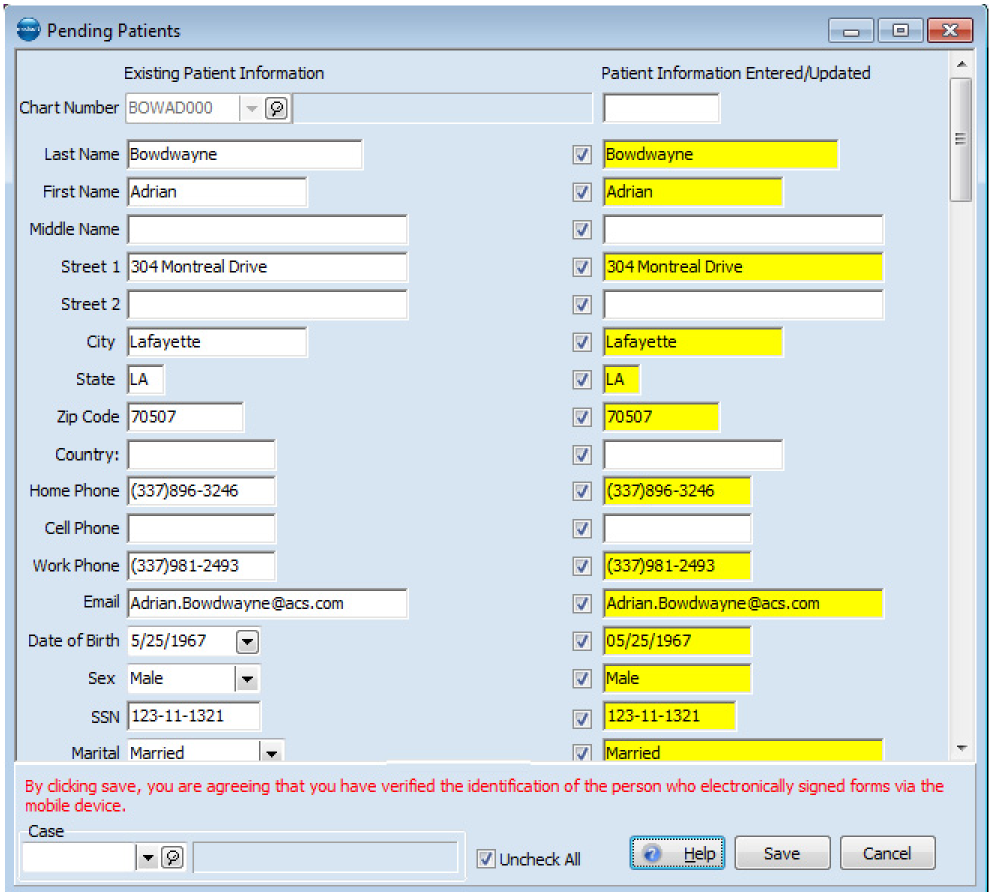
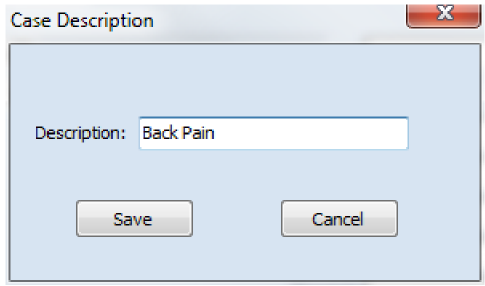


Figure 4. Pending Patients screen

New patients

For new patients, information appears on the screen as follows:

Element	Description
Left-hand column	This column will display all of the information entered by the patient that can be saved in the patient record in Medisoft.
Right-hand column	This column will display all of the information that the patient entered in the mobile application. All fields will be highlighted in yellow to indicate that it is new information for the patient's record. You can use the check boxes to select which information you want to transfer to the patient's permanent record in Medisoft.

Element	Description
Case	The patient information must include a case. To create a new case, right-click on the Case field and select New Case.  *Figure 5. Case Description screen* Enter a description and click Save.

Existing patients

For existing patients, information appears as follows:

Element	Description
Left-hand column	This column shows the information for the patient that currently exists in Medisoft.
Right-hand column	This column shows the information that the patient entered in the mobile application. Fields that are highlighted in yellow are those that differ from what is currently in the patient's record in Medisoft. Select the check boxes for the information that you want to update in Medisoft.
Case	The value in the Case field will default to the value determined by Program Options in Medisoft (Data Entry tab - Case Default field), if the patient has an existing case. You can right-click on the Case field and create a new case or copy an existing case. In addition, you can use the drop-down to select a different case.

When you click Save on the Pending Patients screen, the patient's record will be created or updated and all of this information placed on the New Patient Intake Information screen (see "New Patient Intake Data screen" on page 9).

Some of the information entered by the patient on the mobile device will not be transferred to the left-hand column. This includes

- referring provider
- subscriber
- insurance
- guarantor
- employer

To update Medisoft with this information, you must open that record manually. For example, the patient can enter guarantor information while using the mobile device but this information will not be entered in Medisoft automatically. In the screen sample below (***Figure*** 6 on page 8), note that the right-hand column displays information entered by the patient from the mobile device, but there are no corresponding fields on the left-hand column for Medisoft. The Guarantor information must be updated manually.

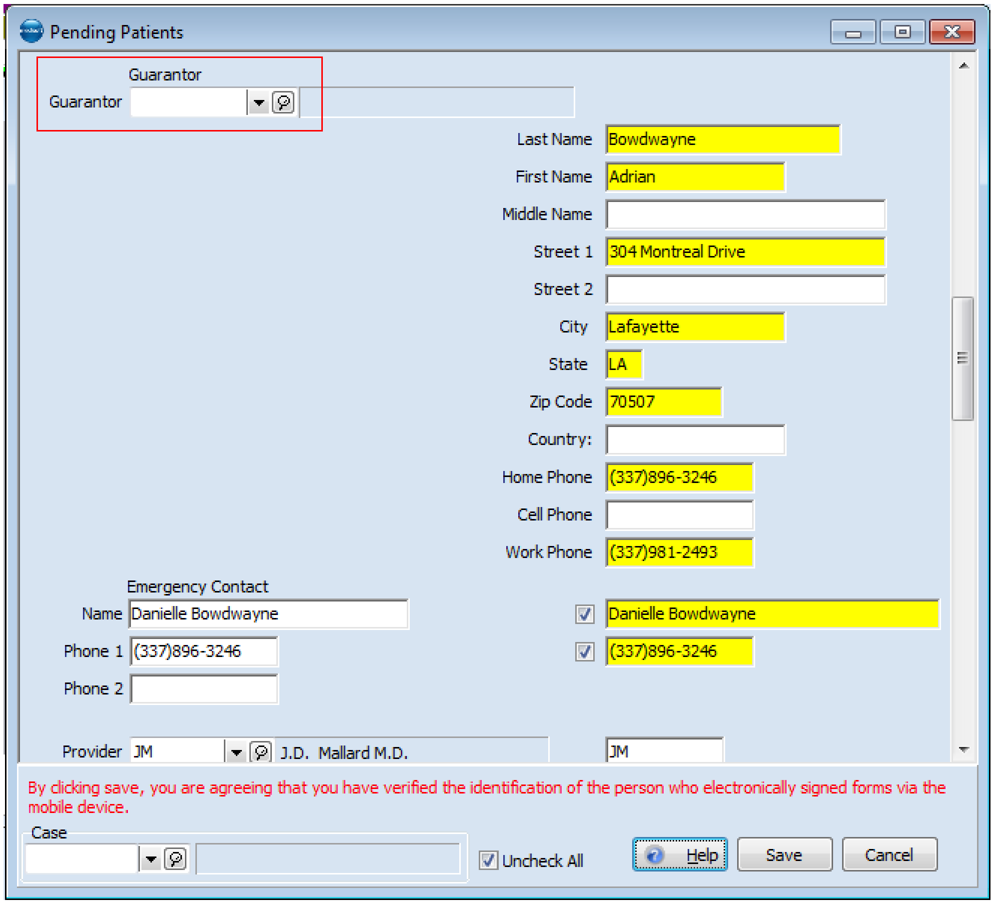


Figure 6. Pending Patients screen

- If there will be a new guarantor, right-click the Guarantor field and select New Guarantor. The Patient/Guarantor screen will appear and you can create a new record using the patient-entered information from the right-hand column.
- If this patient is associated with an existing guarantor, select the existing guarantor from the Guarantor drop-down. Then, if you need to update the guarantor's record, right-click the Guarantor field and select Edit Guarantor.

Note: If you delete a case and the patient has completed a patient intake associated with that case, the patient intake will be deleted.

Updated Case screen

New menu option

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

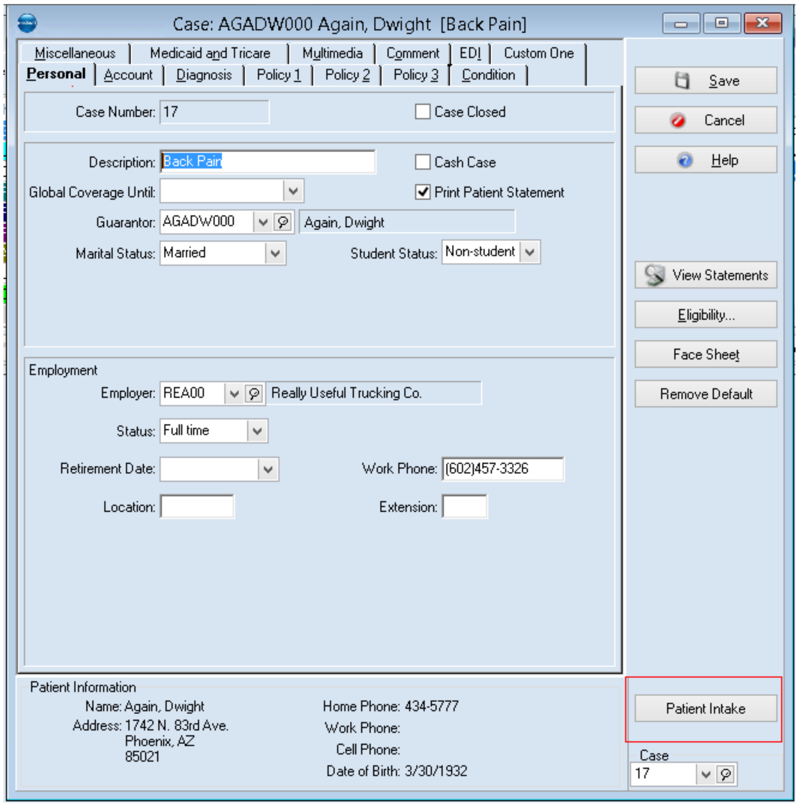


Figure 7. Case screen

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

New Patient Intake Data screen

There is a new screen: Patient Intake Data. This screen will show you the information that the patient entered from the mobile application. Intakes will appear by date. 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.

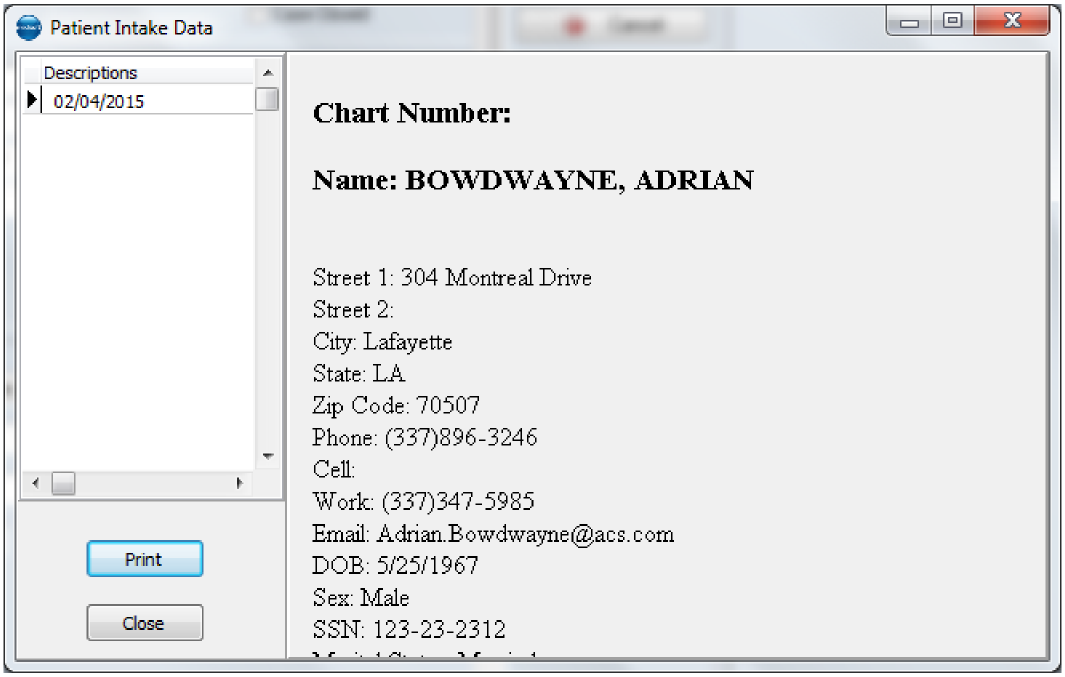


Figure 8. Patient Intake Data screen

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

Additional Medisoft Enhancements

Unprocessed Charges

There are new Date Range fields on the Unprocessed Charges screen.

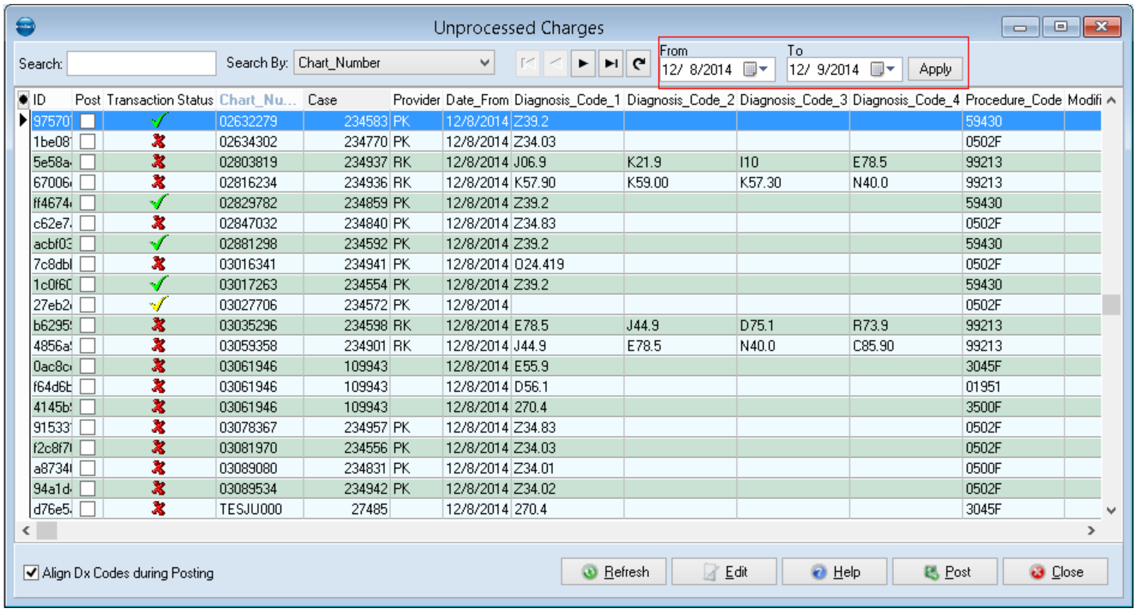


Figure 9. Unprocessed Charges screen

You now have the ability to set a date range in Unprocessed Charges. Setting a date range can improve the performance of processing if you have a large number of charges to process. The default values for both ‘Date From’ and ‘Date To’ will be the current date. If you set the ‘Date To’ to a date prior to the ‘Date From’, you will see charges only for the value in the Date To field.

Once you set your date range, click the Apply button to refresh the screen with the new dates.

Note that performance is degraded when the date range is a large span.

ICD-10 Code Date

The hard-coded value for the date that ICD-10 codes become live has been updated for receipts where there was no insurance carrier or the case was a Cash Case. The new value is 10/1/2015.

Mobile Transactions

The value for Facility selected on the Mobile device superbill will now appear in Unprocessed Transactions. Previously, Medisoft was using the value set up in the case.

Advantage Data Provider

Advantage Data Provider, which Revenue Management uses to communicate with the server, has been updated to version 11.10.

Checksum Removed

MPIC checksum validation has been removed from Medisoft.

Medisoft 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 App Store.
2. Search for Medisoft v20.
3. Download Medisoft v20.

Figure 10. Medisoft Mobile icon

Appointments screen

Updated Appointments screen

The appointments screen allows viewing by providers. You can navigate to view appointments for a single provider or multiple providers. 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.

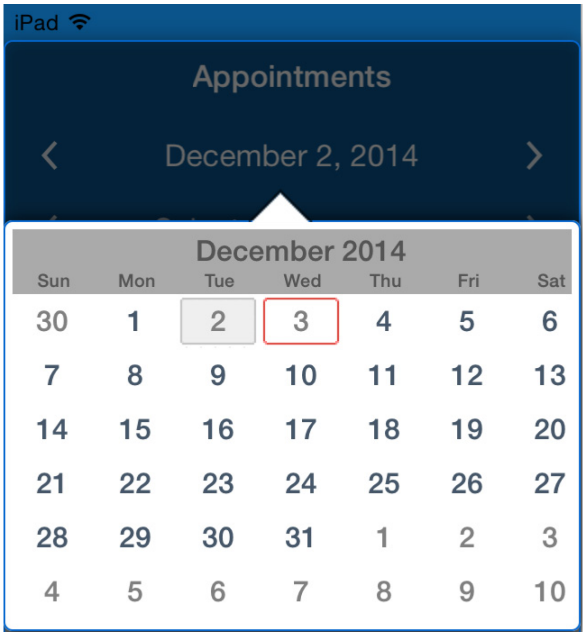


Figure 11. Date selection

Multiple provider selection

Tapping on the Provider name allows you to select a different provider or multiple providers.

- If no providers are selected, the display will show Select Provider.
- If you have a single provider selected, the display will show the provider’s name.
- When you have multiple providers selected, the display will show Selected Providers.

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

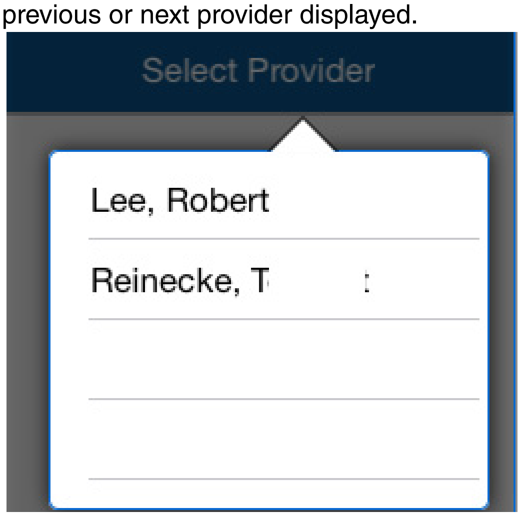


Figure 12. Provider selection

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.

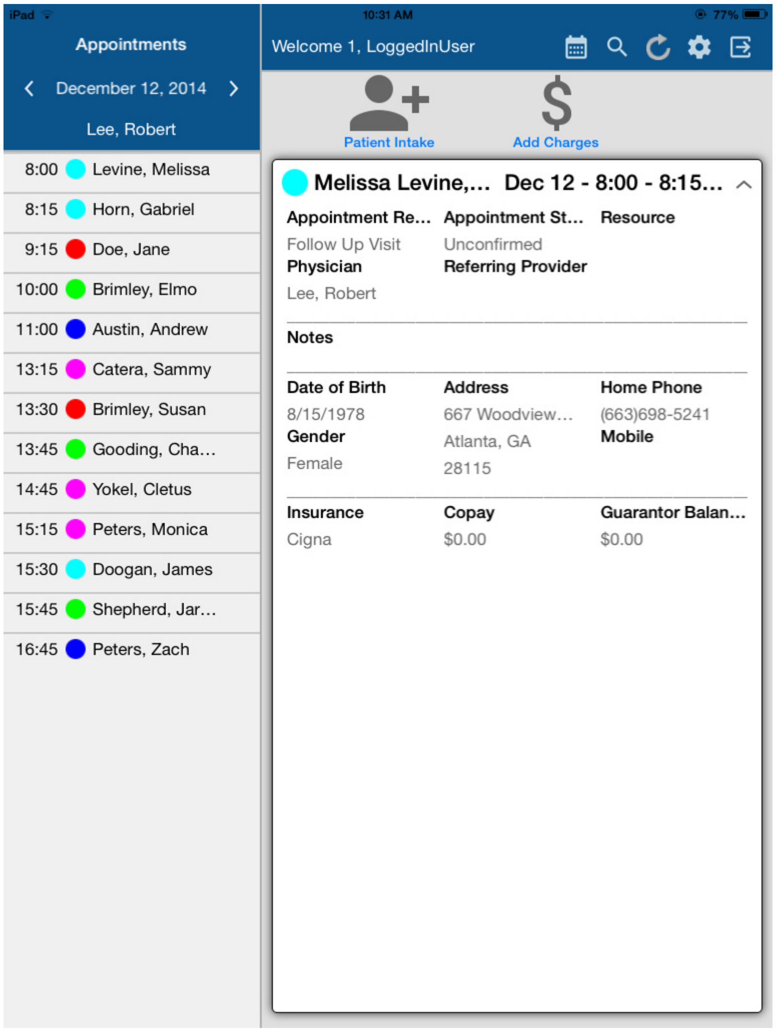


Figure 13. Patient selection

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.

Icon	Description
	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.

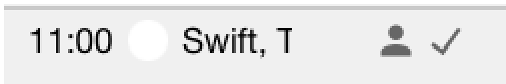


Figure 14. Appointment with icons

Week at a Glance

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

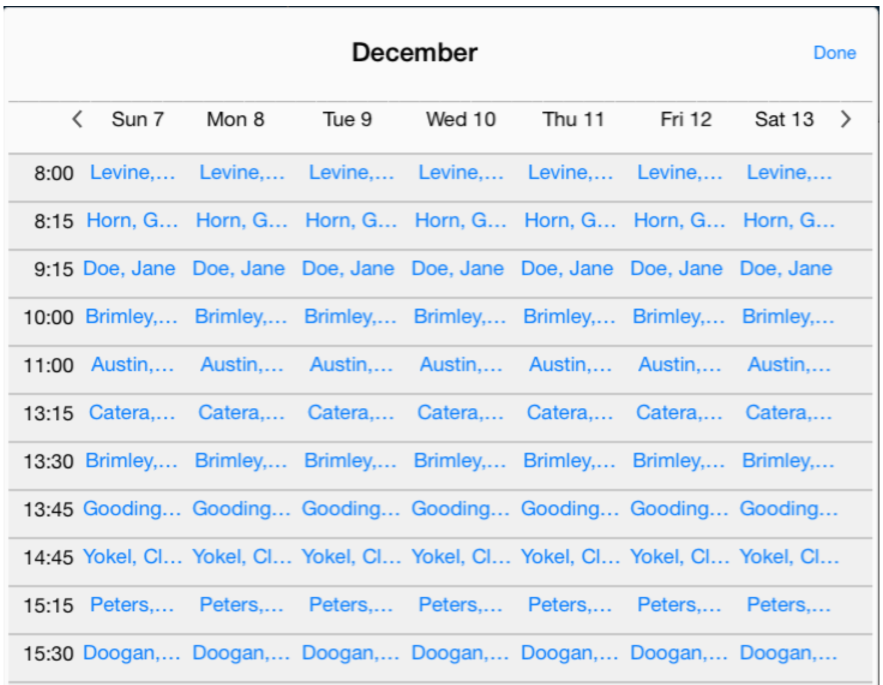


Figure 15. Week at a glance screen

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

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.

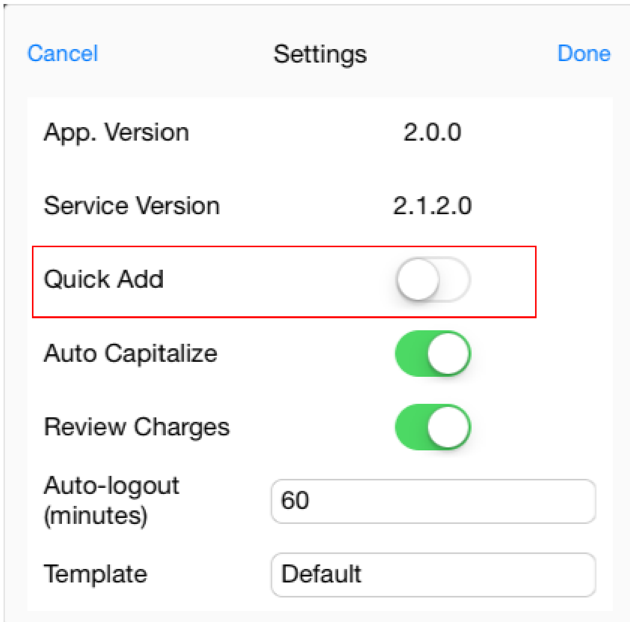


Figure 16. Settings screen

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 19.
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 20.

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.

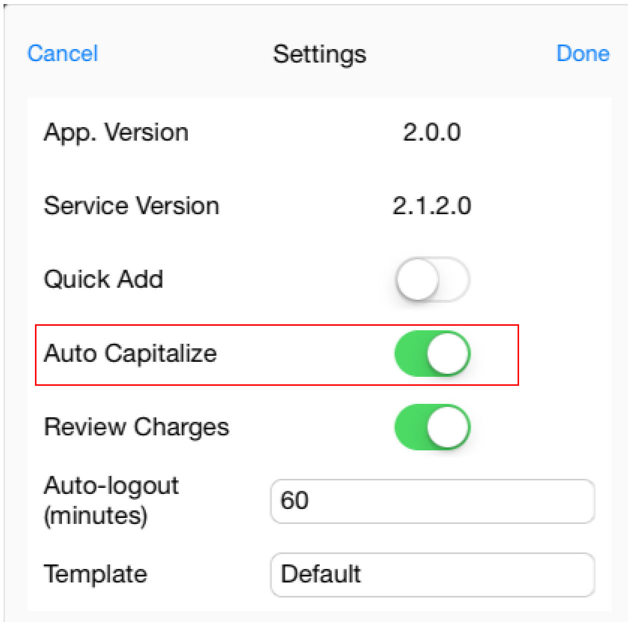


Figure 17. Settings screen

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. This enables a physician to quickly create a new patient record.

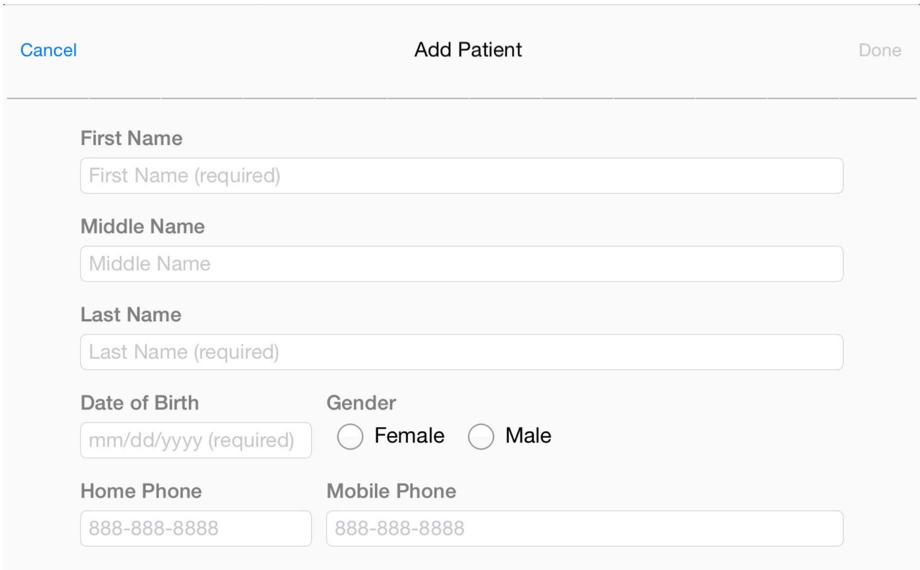


Figure 18. Patient Quick Add screen

Once you tap Done, you can send charges for the patient.

When you send charges for a newly added patient using Patient Quick Add, those charges will appear on the Unprocessed Charges screen with a Case of -1. This informs you that you must complete the remainder of the patient's record and create a case for the patient in Medisoft before you process the 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:

- Home
- Cell phone
- Work

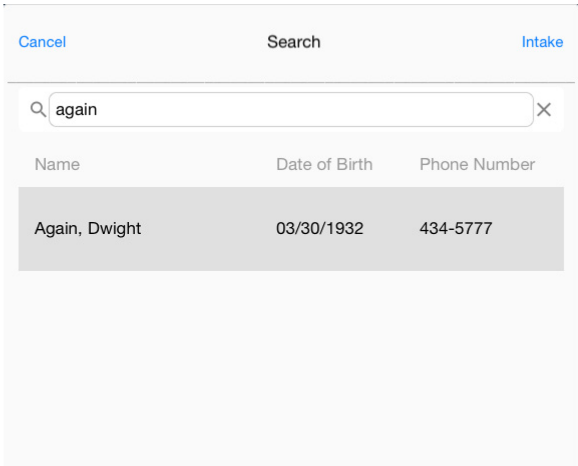


Figure 19. Patient Search screen

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 it is only available for new patients.

Patient Intake

Note: The mobile app is supported on iPads with display dimensions of 9.5 inches or greater; and 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 Medisoft 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 Medisoft 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 Medisoft.

Once the front desk person activates the device, you will be able to enter your information. You then tap in the field and type in your information.

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.

Required fields

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

New menu option

There is a new menu option on the main screen: Patient Intake. Once you select an appointment or select a patient on 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.

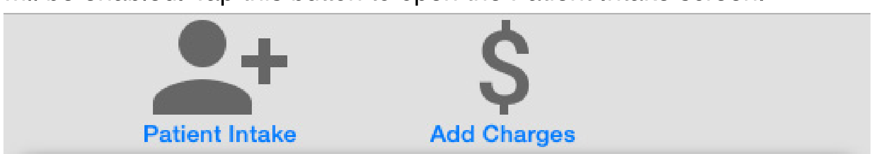


Figure 20. Mobile app screen

Patient Intake lockdown

Once you tap Patient Intake, the Medisoft 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 any menu item to open the corresponding page.

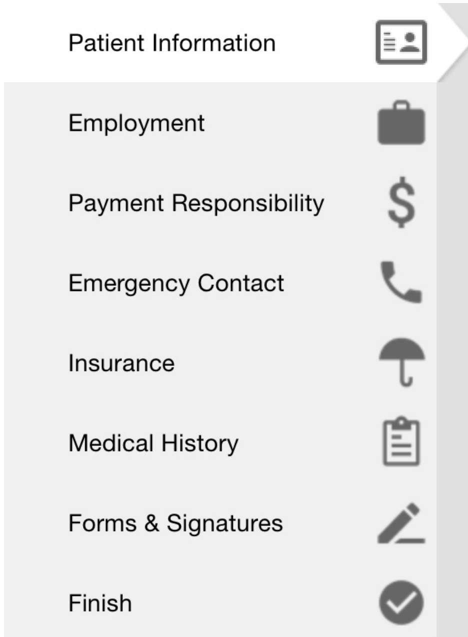


Figure 21. Patient Intake left menu

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

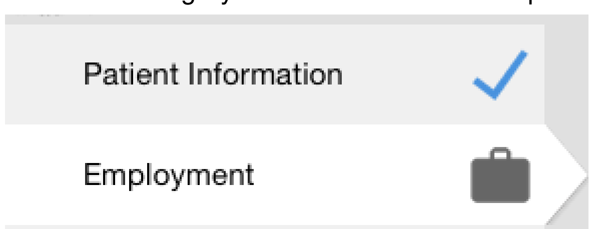


Figure 22. Patient Intake menu

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 type.

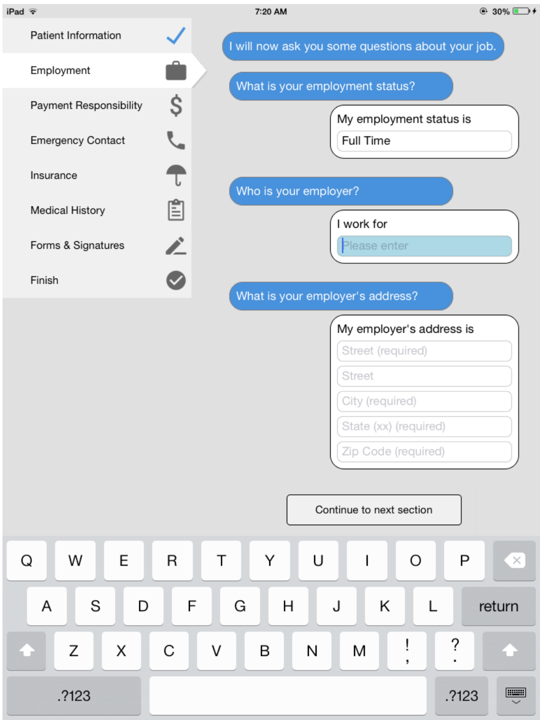


Figure 23. Keyboard control

Picker

Use the picker to select a value from a drop-down menu. Tap in a field that is not a free text field. Tap the value you want at the bottom of the screen (you may need to scroll to find the value you want). Then, tap Done.

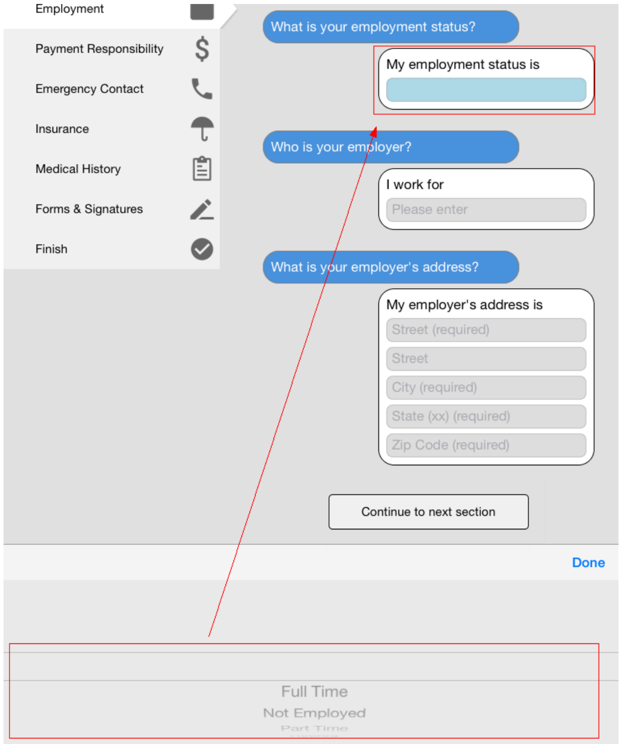


Figure 24. Picker control

Switch

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

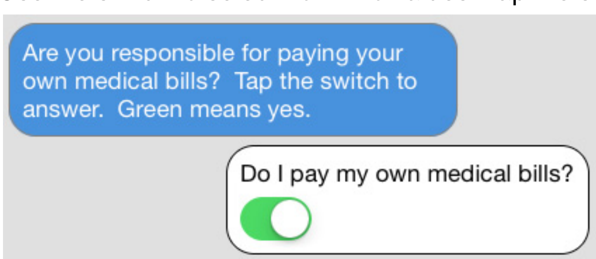


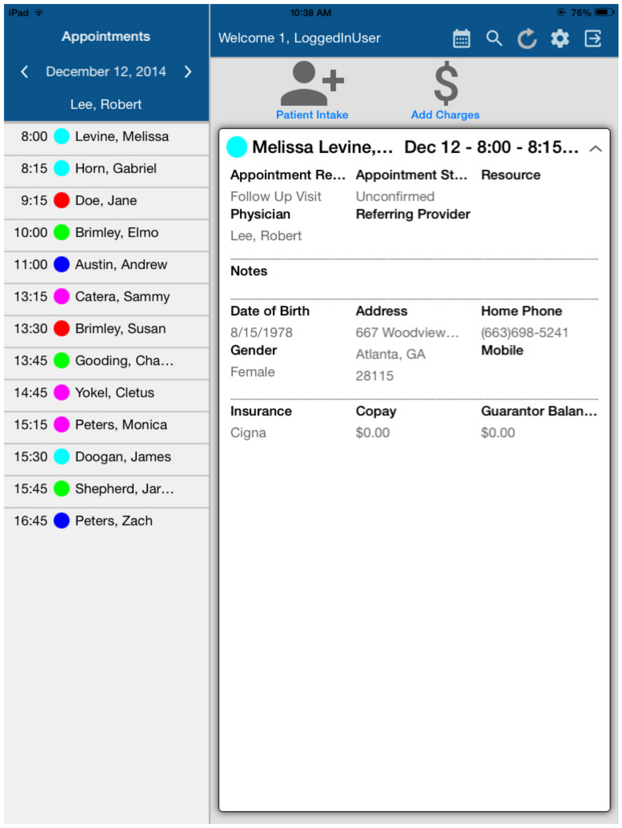
Figure 25. Switch control

Workflow for Patient Intake

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

1. Start the Medisoft Mobile app on the device.

2. Open the Search screen or choose the patient from the schedule.



3. Tap Patient Intake; or Intake from the Search screen.

4. You are ready to hand the device to the patient when the screen looks like this:

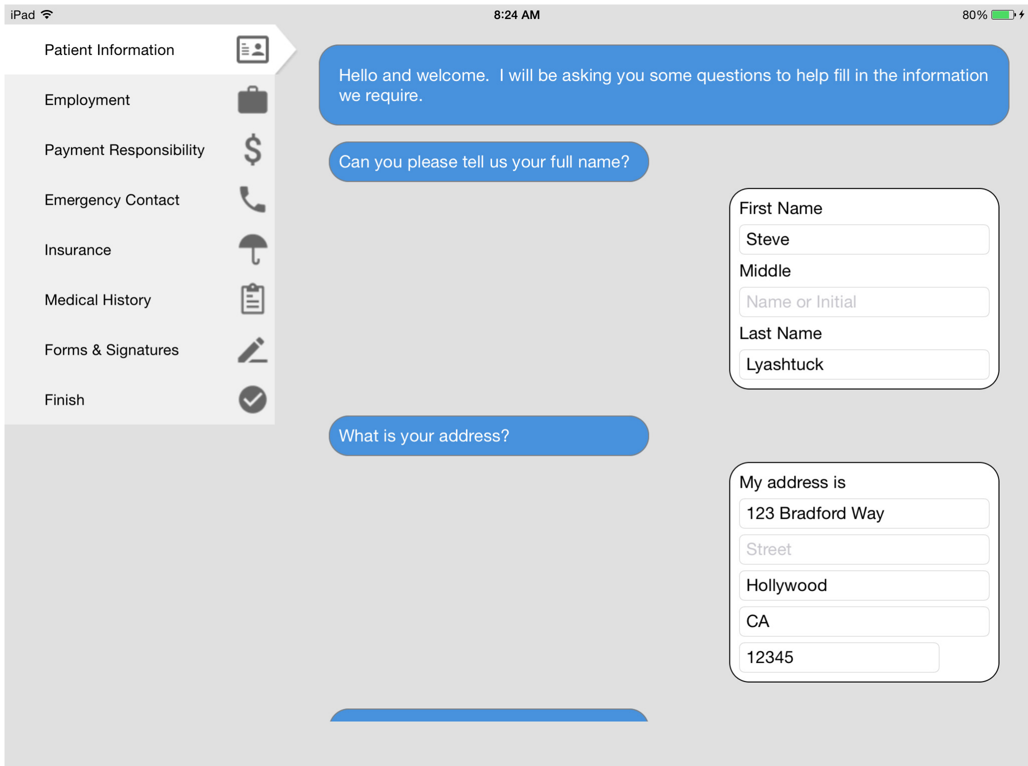


Figure 26. Mobile app ready for patient

NOTE: existing patient information will be populated automatically.

5. Give the device to the patient.
6. When you receive the device from the patient, verify that the screen looks like this:. If not, they have not yet tapped I am Finished.

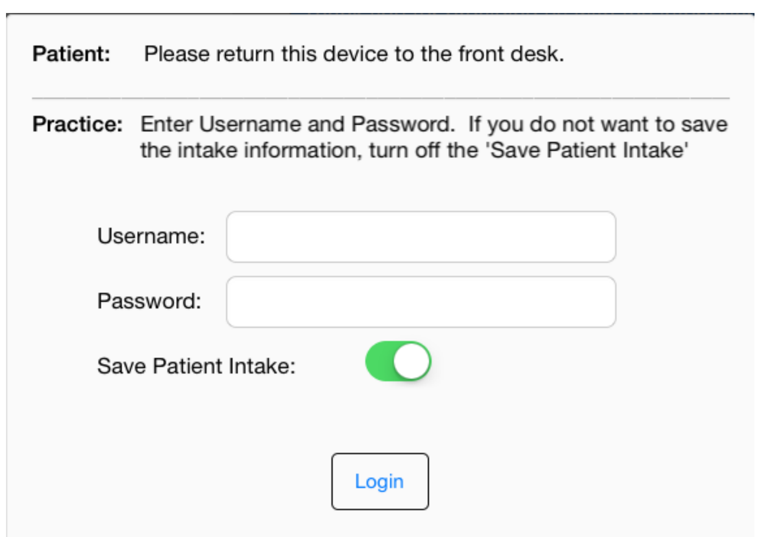


Figure 27. Mobile app when received from patient

7. Enter your Username and Password. If you want to save the patient's information, set Save Patient Intake to On (green).
8. Click Login.
9. Use Pending Patients in Medisoft to update the patient record in Medisoft.

Revenue Management

For Revenue Management, an updated version of the “InfoExchangeClient.jar” file has been included in the Medisoft 20 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 55.

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 Medisoft. 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.

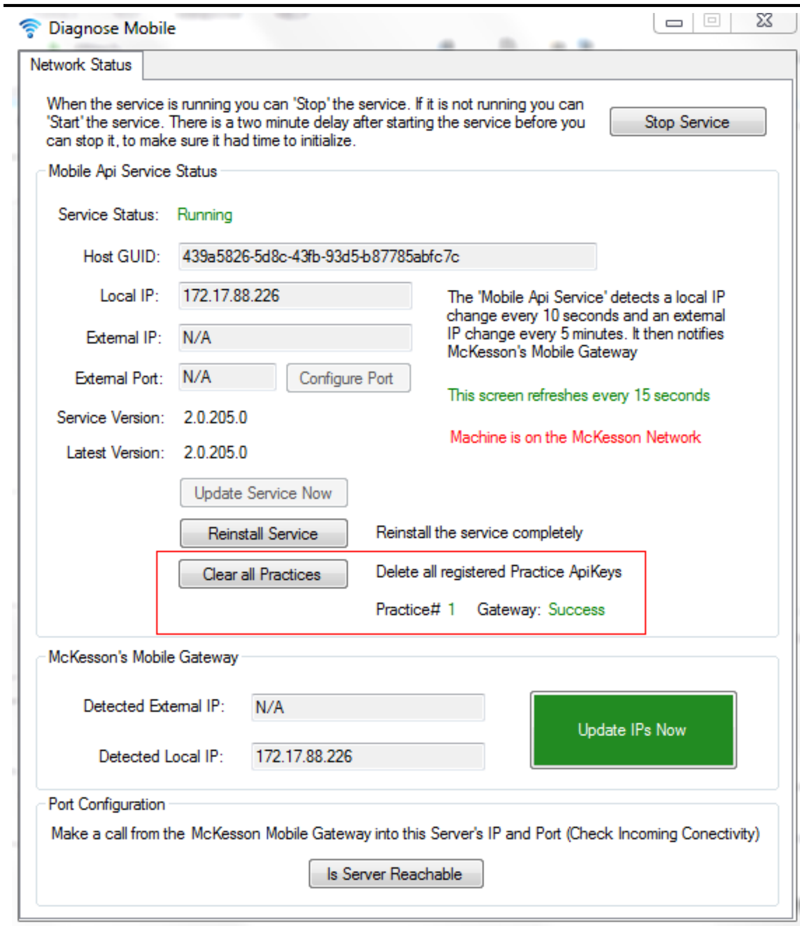


Figure 28. Diagnose Mobile screen

Configure Port button

Use the Configure Port button to manually change the port that the mobile service uses.

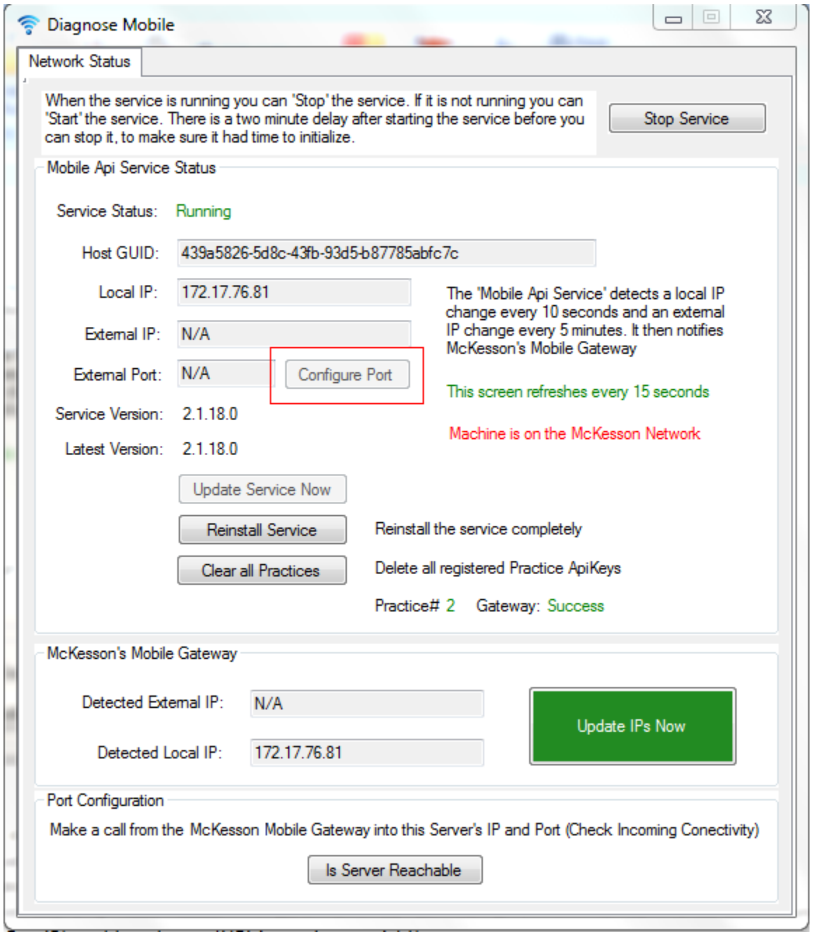


Figure 29. Diagnose Mobile screen

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

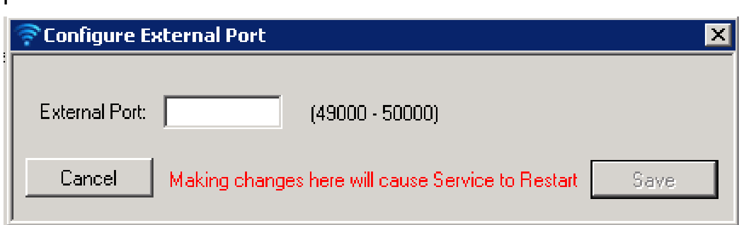


Figure 30. Configure External Port screen

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.

Running the Clear ICD-10 utility

This utility clears your diagnosis table of ICD-9 codes that appear in the ICD-10 Code field and description. Use this utility ONLY if you are upgrading from version 18 or earlier.

1. Navigate to the Bin directory in your Medisoft folder.
2. Double-click ClearICD10utility.exe. The Open Practice screen appears.

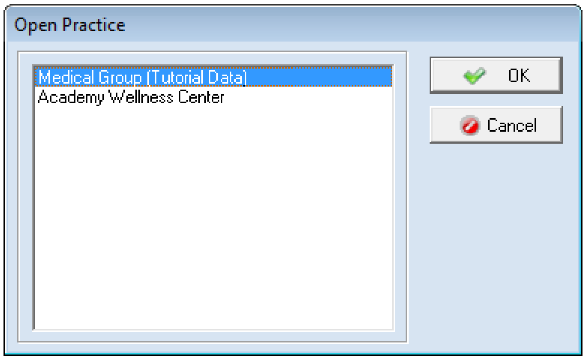


Figure 31. Open Practice screen

3. Select your practice and click the **OK** button.
4. If your practice has login security, enter your Login Name and Password. Then, click the **OK** button.

If...	Then...
an Information screen appears telling you there are no matching codes,	Click the **OK** button. You do not need to run this utility.
the Clear ICD-10 Utility screen appears,	Continue this procedure with step 5.

5. On the Clear ICD-10 Utility screen you will see a grid of matching codes. In the example shown in ***Figure*** 32 on page 32, notice that the values in the ICD-9 and ICD-10 columns are the same. The values in the ICD-10 columns must be cleared.

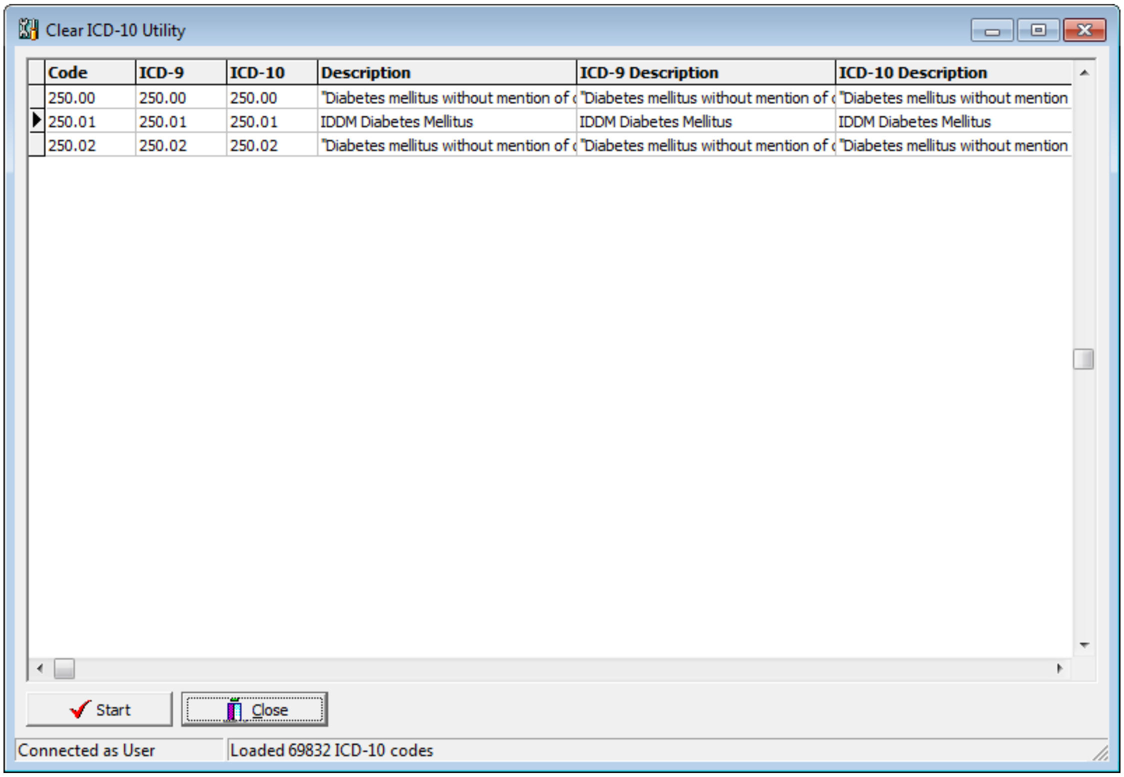


Figure 32. Clear ICD-10 Utility screen

6. Click the **Start** button. You will see a progress bar and then a warning screen appears.

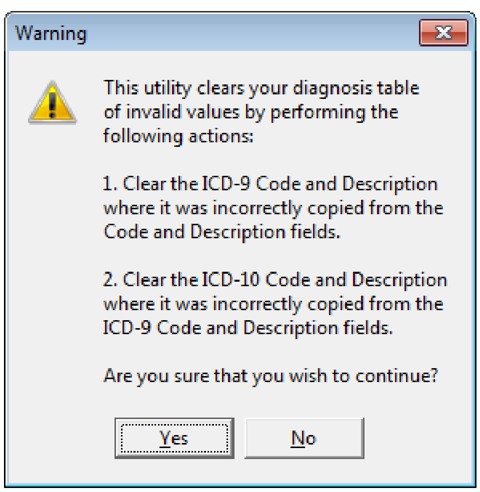


*Figure 33. Warning screen**

*Note: This is a preexisting utility. All it will do is clear the ICD-10 field when the value is the same as the ICD-9 field. No information was copied incorrectly, as indicated by the Warning screen.

7. Click the **Yes** button. The Clear ICD-10 Utility screen appears when the process is complete.

   In the example (***Figure*** 34 on page 33), all of the values have been cleared.

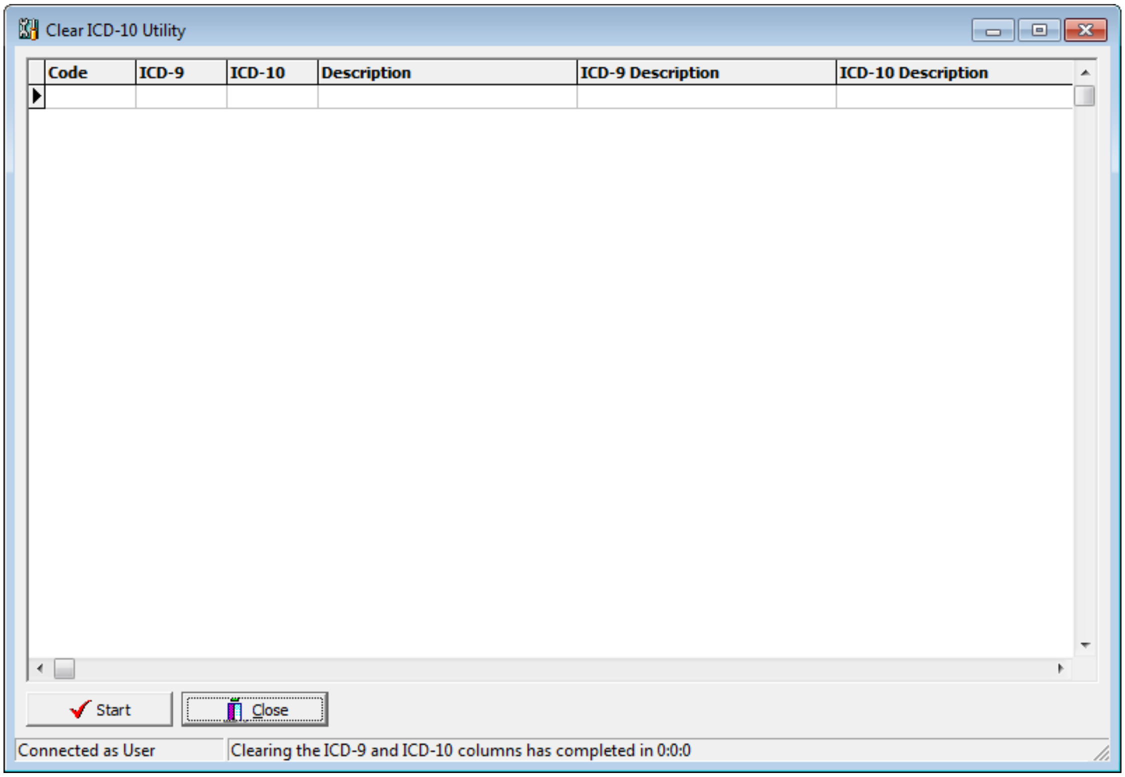


Figure 34. Clear ICD-10 Utility screen

8. Click the **Close** button.

Chapter 2 - Resolved Issues

The following issues were resolved with Medisoft Release 20.

TD	Application	Description
22061	Settings	If a password expires and a new password is set for the user, you can now launch Revenue Management without logging in. Previously, the system would not let you log into Revenue Management with the new password. Steps to recreate 1. Allow a password for a user to expire in Medisoft. 2. Assign a new password for that user. 3. Log into Medisoft using that user's login and password. 4. On the Activities menu, select Revenue Management. 5. Verify that you are able to use Revenue Management.
24017	Unprocessed Transactions	Viewing and editing unprocessed transactions has been improved for speed. Steps to recreate 1. Create transactions in Medisoft Clinical or a mobile device and send them to Medisoft. 2. On the Activities menu in Medisoft, select Unprocessed Transactions. The Unprocessed Charges screen appears. 3. Verify that the list of unprocessed transactions appears more quickly that it previously did. 4. Select a transaction and click the Edit button. The Unprocessed Transactions Edit screen appears. 5. Make changes and save. Verify that you can edit transactions more quickly than before. NOTE: You must now manually validate diagnosis codes on the Unprocessed Charges screen. To do so, 1. Select the check boxes in the Post column for the transactions you want to verify. 2. Right-click and select Validate Dx Codes. In addition, a new date range filter has been added to the Unprocessed Charges screen to allow you to filter charges by date. For more information, see "Unprocessed Charges" on page 11.

<table>
<tr><td>24020</td><td>Transactions</td><td>You will no longer incorrectly receive the message "Chart number: XXX has one or more diagnosis codes in the status of Diagnosis Error. These diagnosis codes will not appear on your document" when you print a receipt in Transaction Entry. You would receive this message when you tried to print a receipt for a charge entered and a Cash Only case was selected.

<u>Steps to recreate</u>
1. Create a patient and create a case for that patient marked as Cash Only.
2. On the Activities menu, select Enter Transactions. The Transaction Entry screen appears.
3. Select that patient and enter a charge.
4. Click the Save button.
5. Click the Print Receipt button.
6. Verify that you do not see this message.</td></tr>
<tr><td>24056</td><td>Insurance Carriers</td><td>You will no longer receive an error 5101 if you type too quickly in the Search for field on the Insurance Carrier List screen.

<u>Steps to recreate</u>
1. On the Lists menu, point to Insurance, and select Carriers. The Insurance Carrier List screen appears.
2. In the Search for field, quickly type characters that will NOT match an carrier in the system.
3. Verify that there is no error.</td></tr>
</table>

Chapter 3 - General Guidelines for Customizable Forms for Patient Intake

Below are some general guidelines for the customizable forms that are part of the Patient Intake feature on the Medisoft 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\

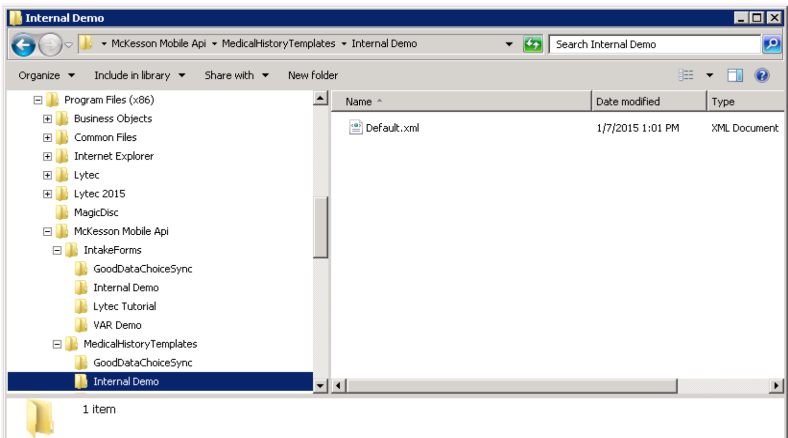


Figure 35. My Computer screen

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\

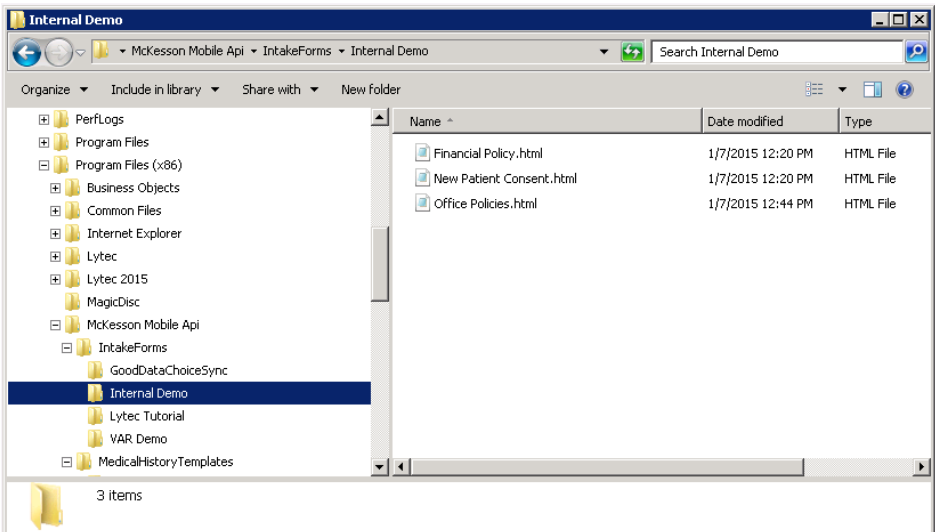


Figure 36. My Computer screen

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>,
, <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 Medisoft. 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 Medisoft 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:

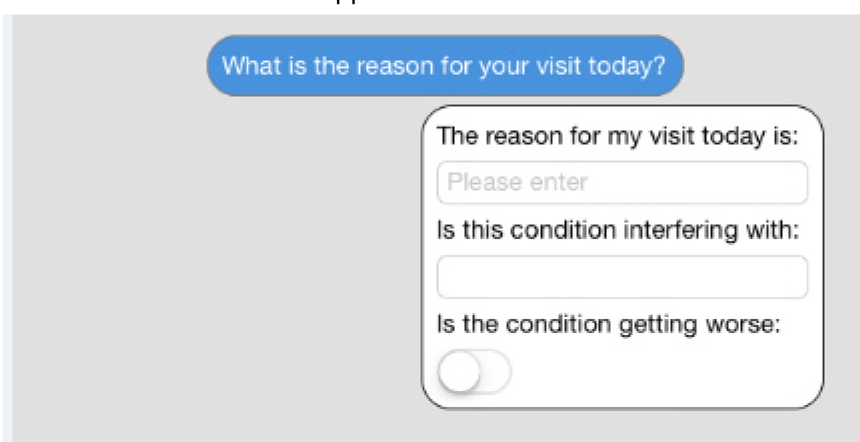


Figure 37. Form appearance

Below is the picklist displayed:

.

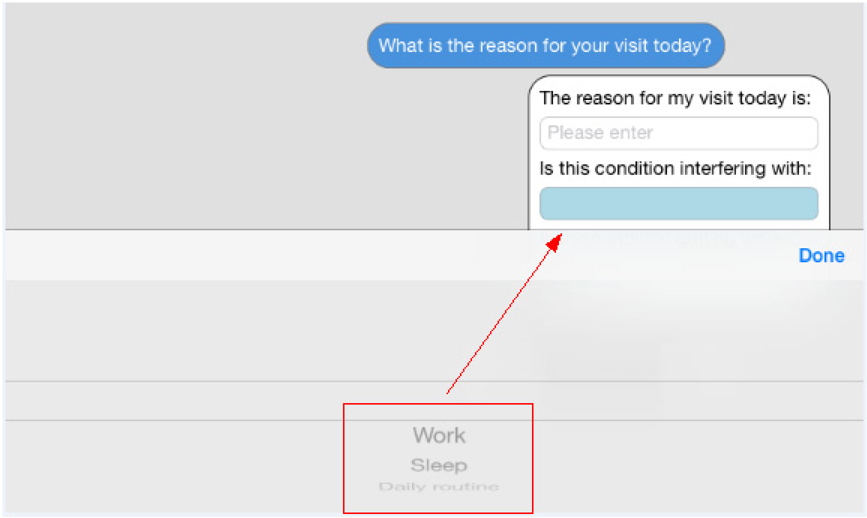


Figure 38. Picklist

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>
```

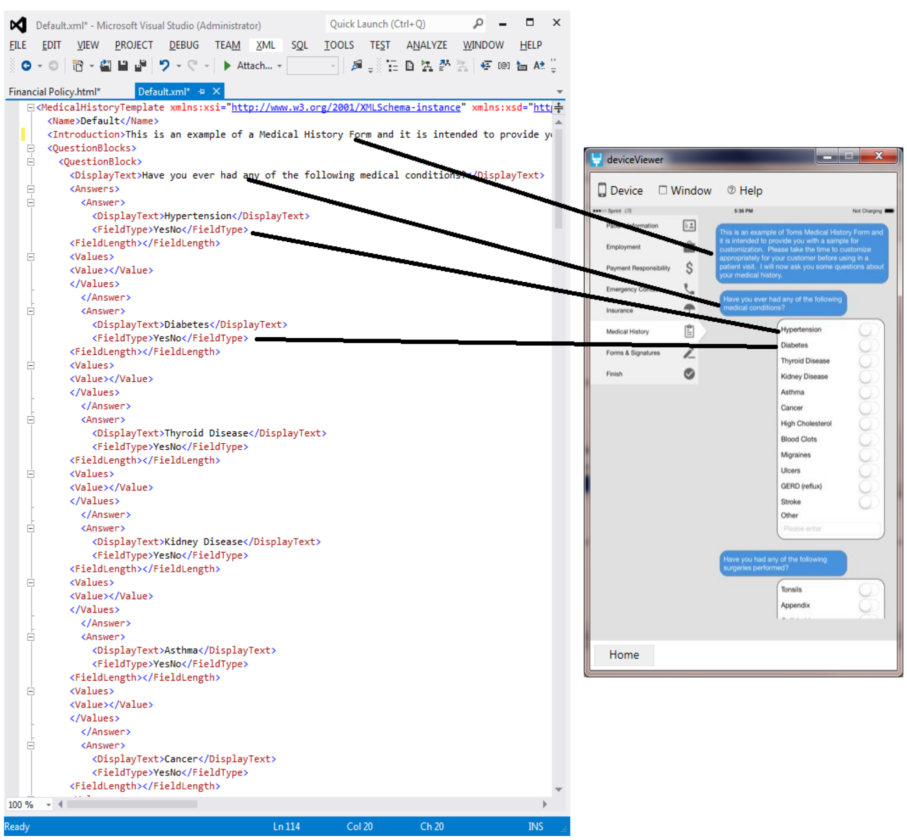


Figure 39. Code example

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

```
<QuestionBlock>
        Blah blah blah
</QuestionBlock>
```

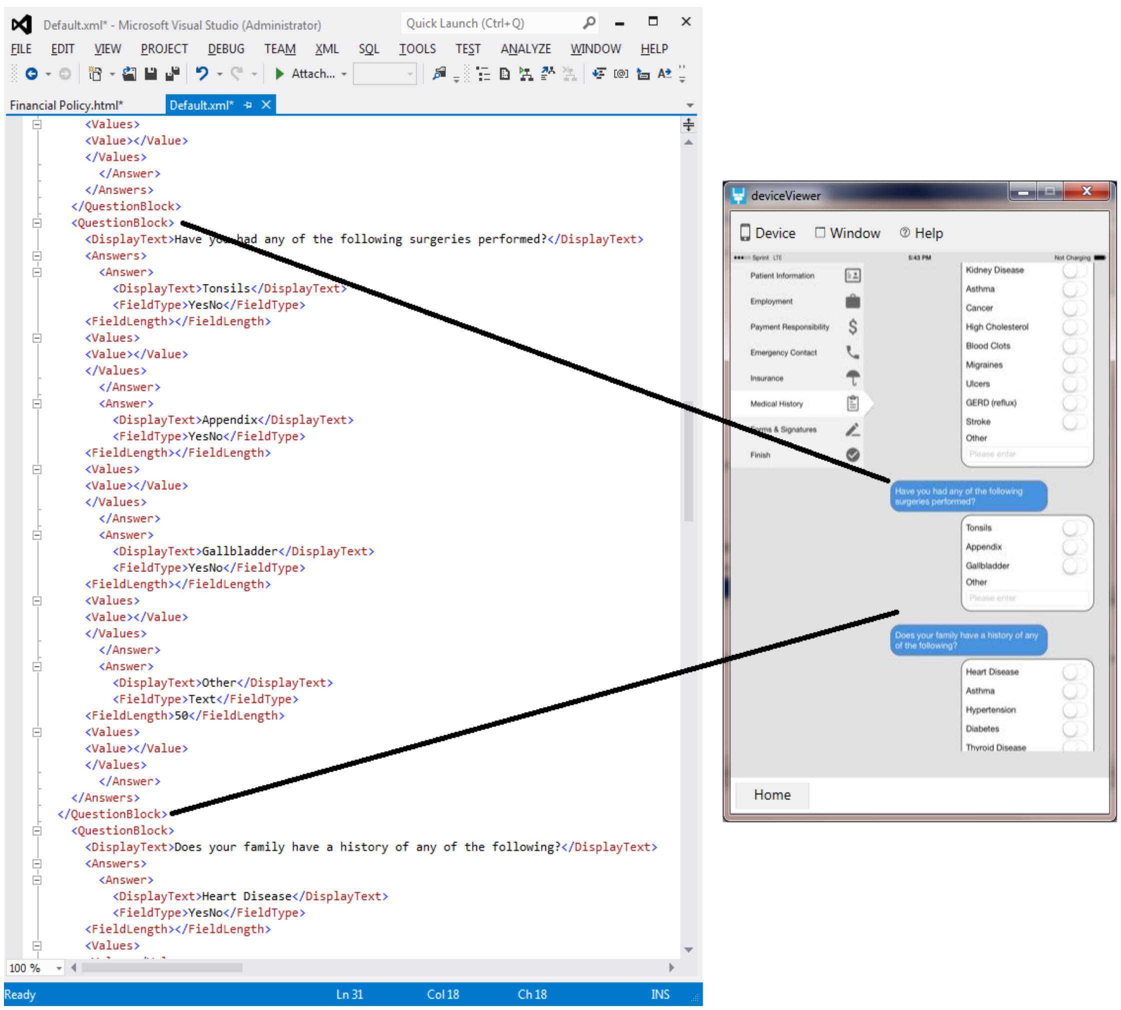


Figure 40. Code example

Free form text field:

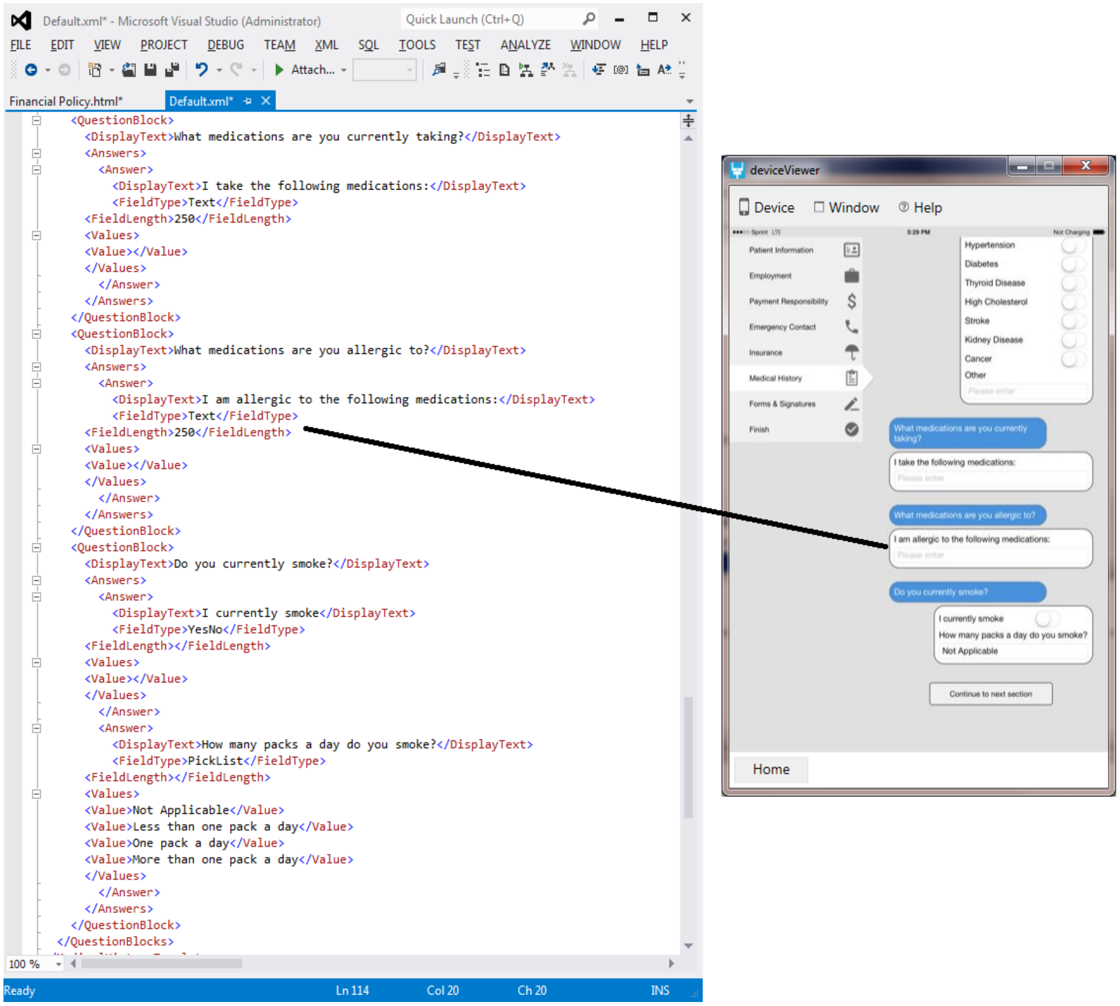


Figure 41. Code example - free form text

Yes/no answer field:

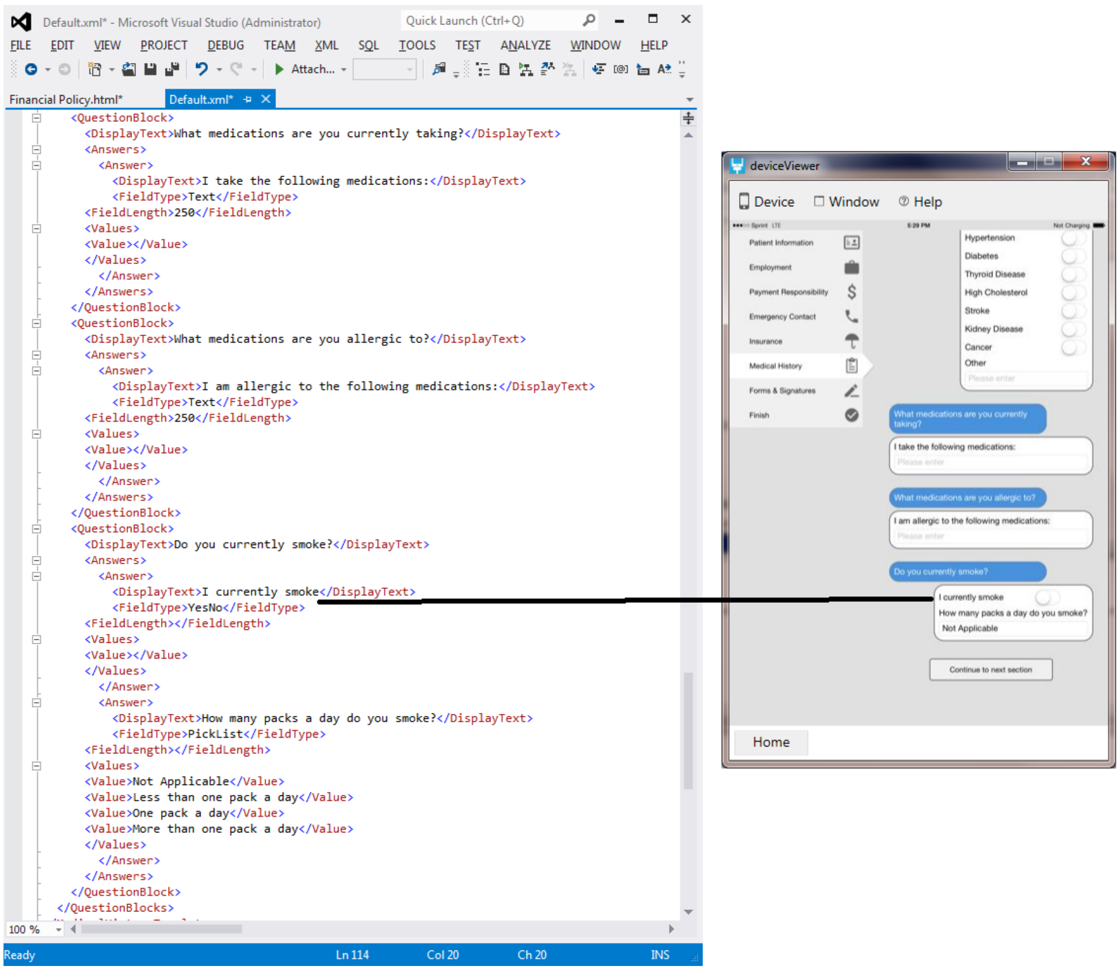
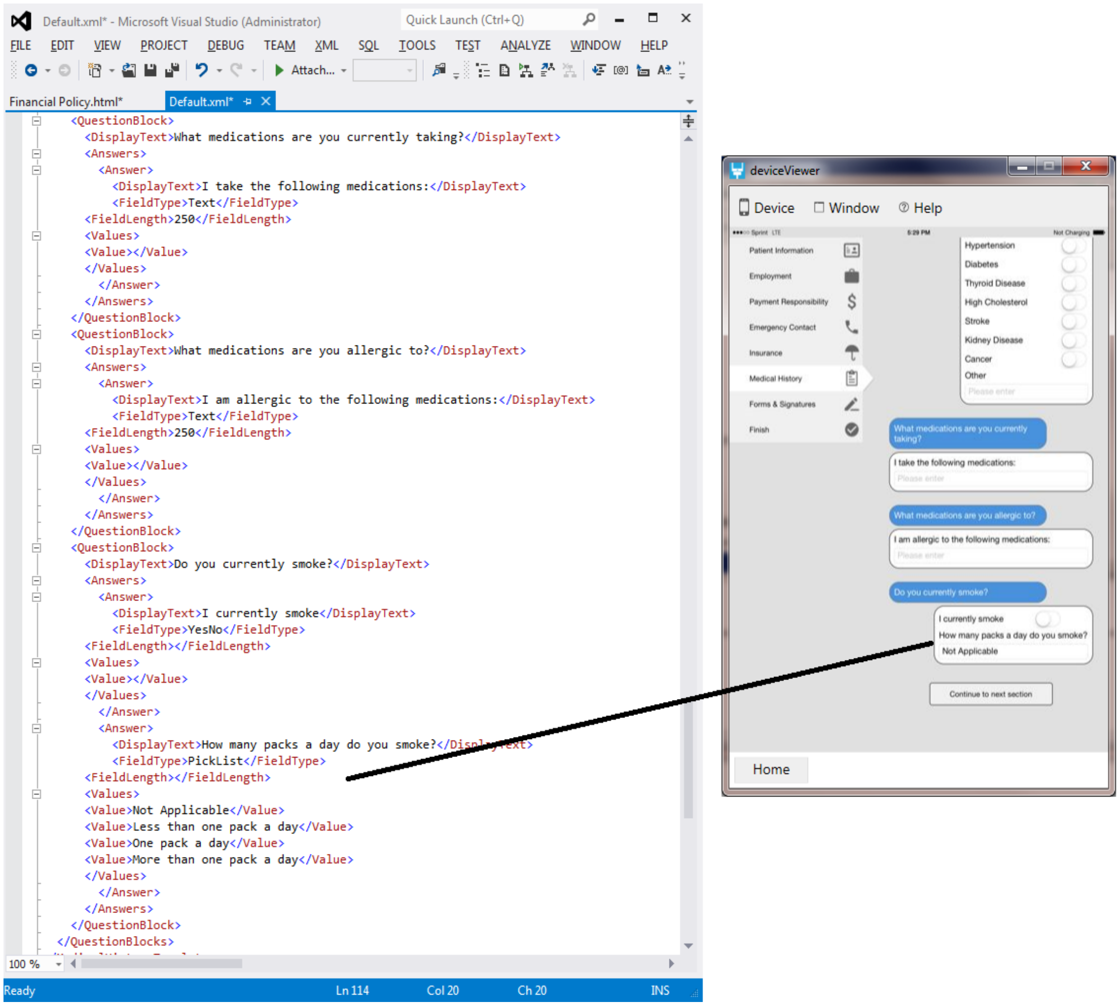


Figure 42. Code example - Yes/No Answer

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>
```

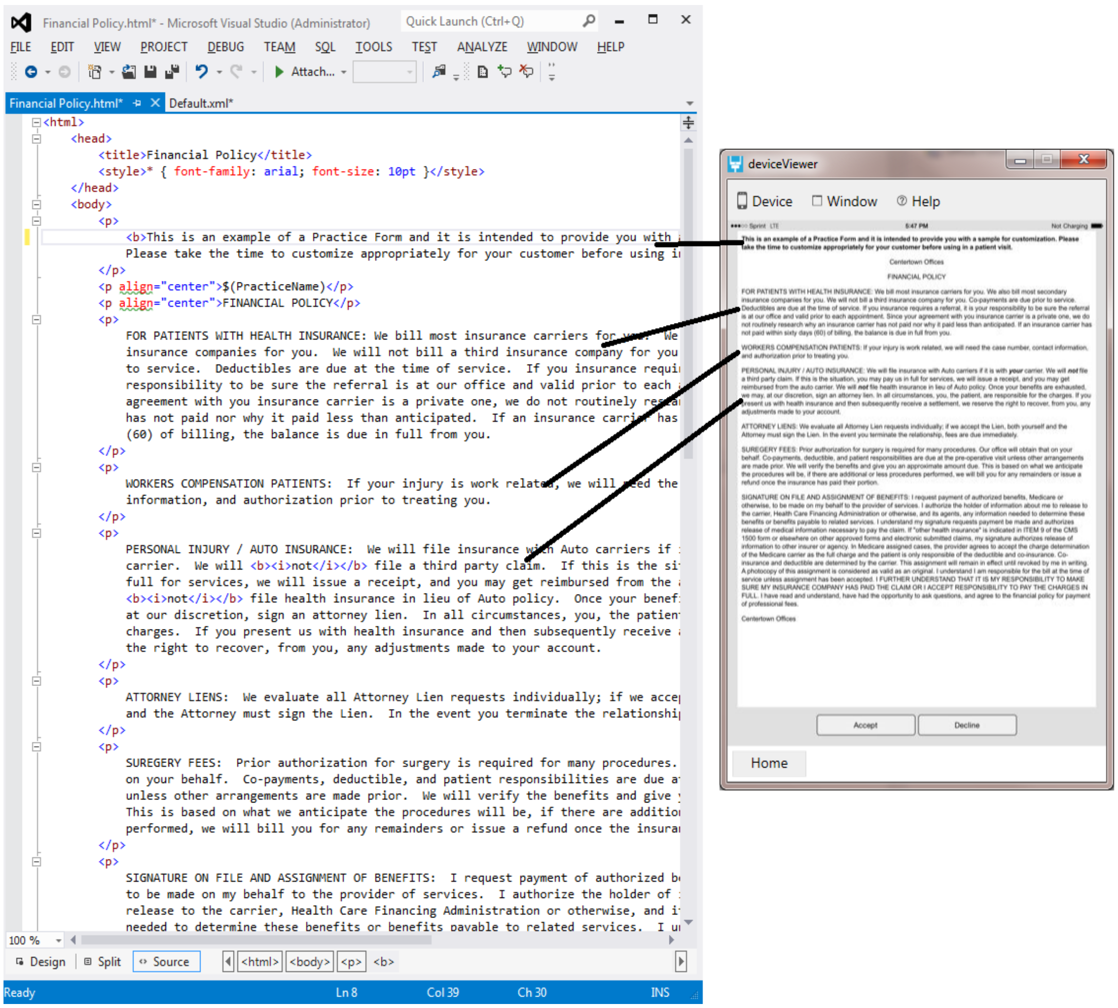


Figure 43. Paragraph example

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>
```

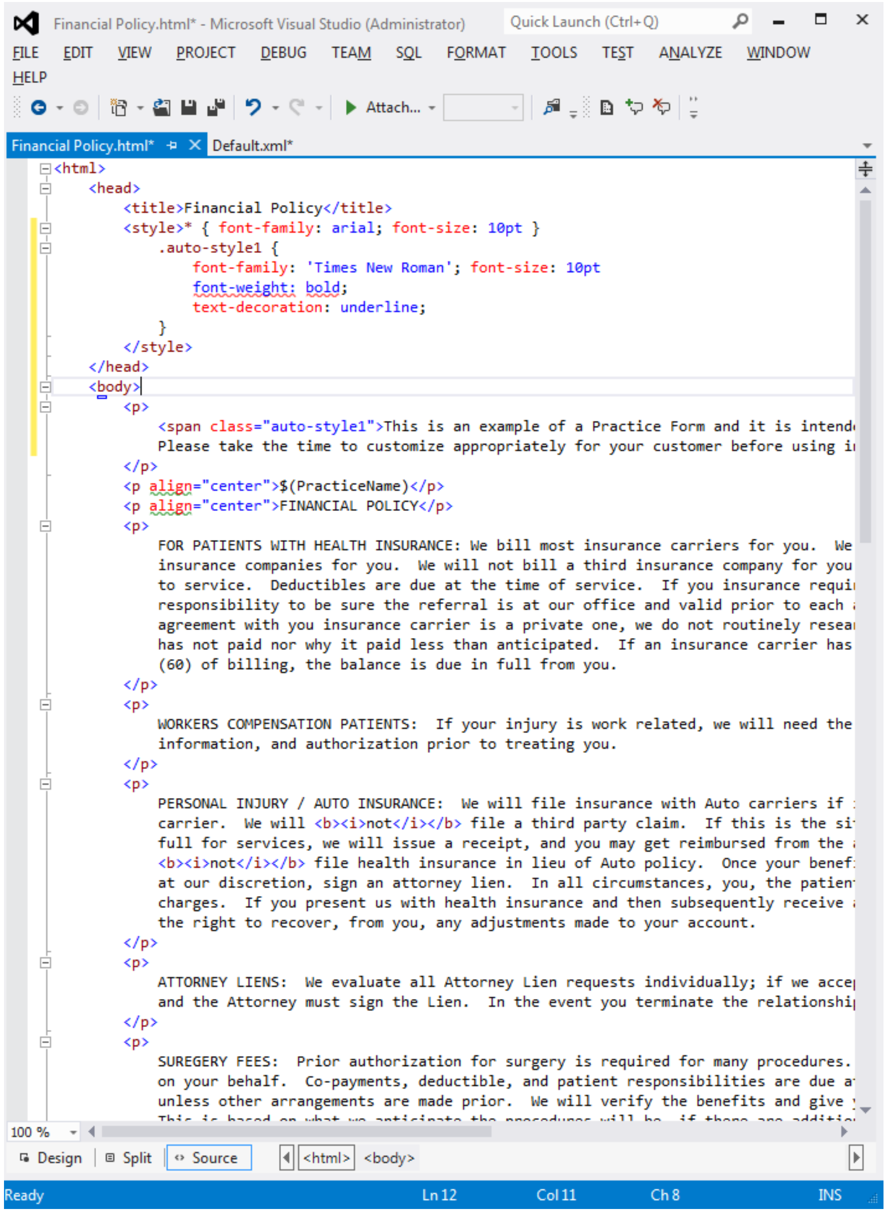


Figure 44. Special attributes example

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 Medisoft. 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 Medisoft desktop application.

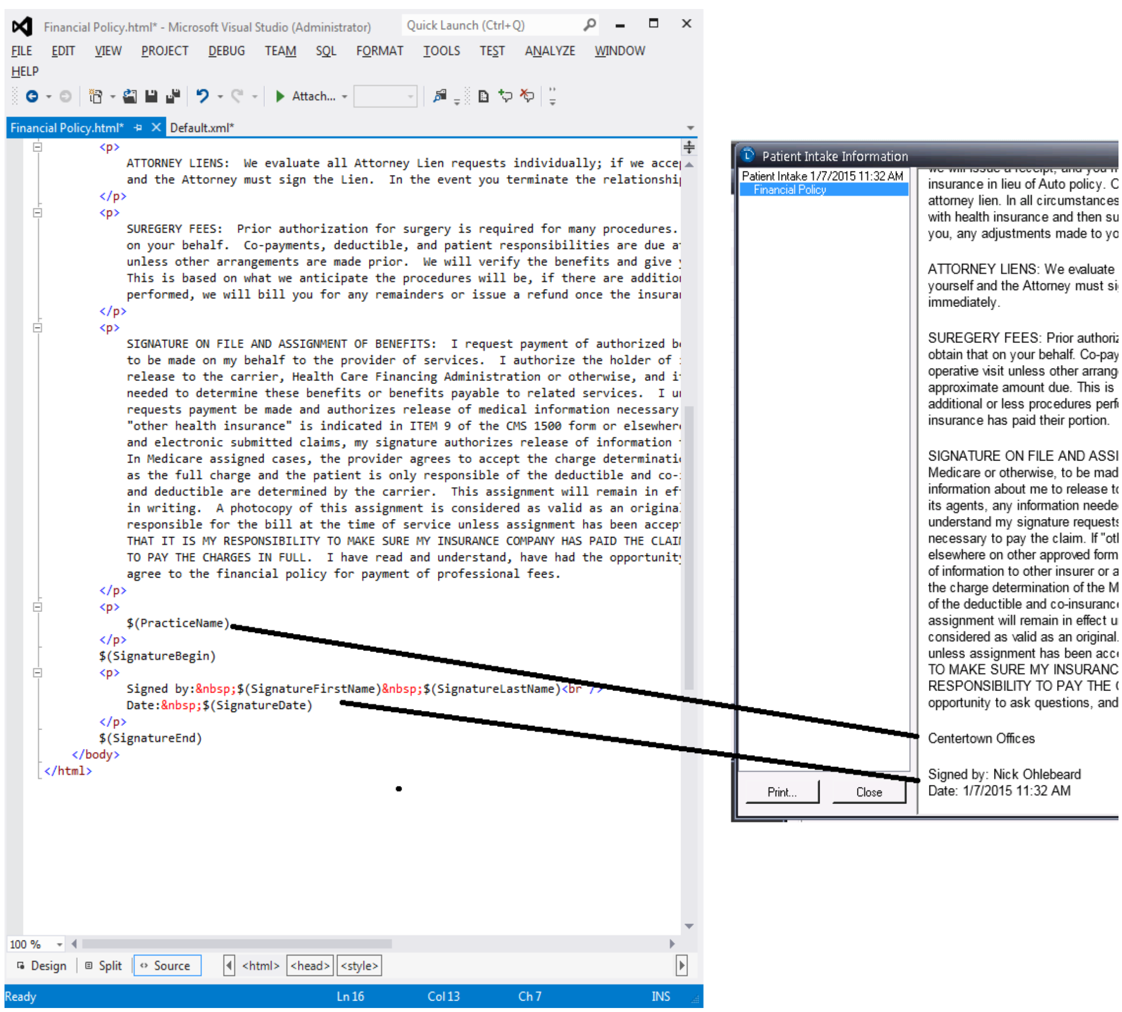


Figure 45. Special tags example

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 56)
  - If it is after March 2, 2015, see "Downloading the new .jar file after March 2, 2015" on page 61.

- 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 61.

1. Open an Internet browser and go to https://infoexchange.relayhealth.com.
2. Log in using your RelayHealth EMF login and password.

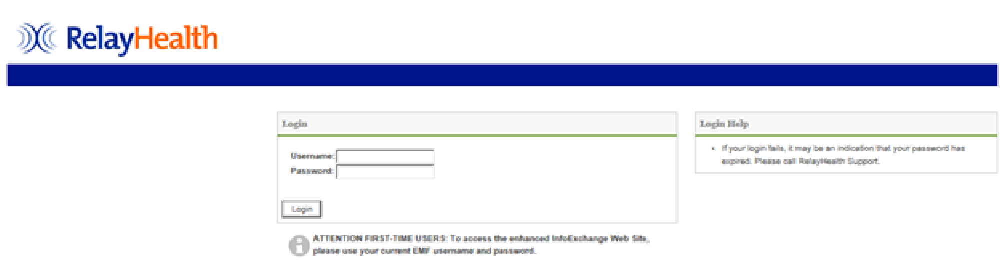


Figure 46. RelayHealth Login screen

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

Figure 47. Migration Status

4. Click Complete Migration and confirm.

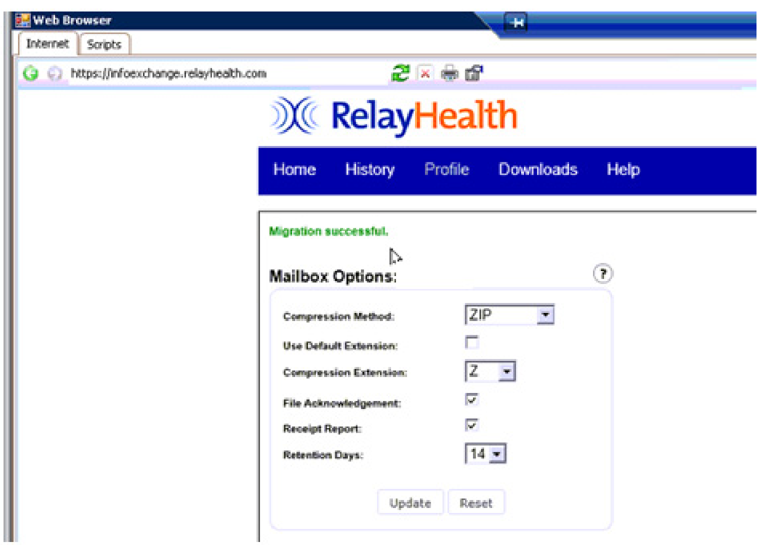


Figure 48. Migration confirmed

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

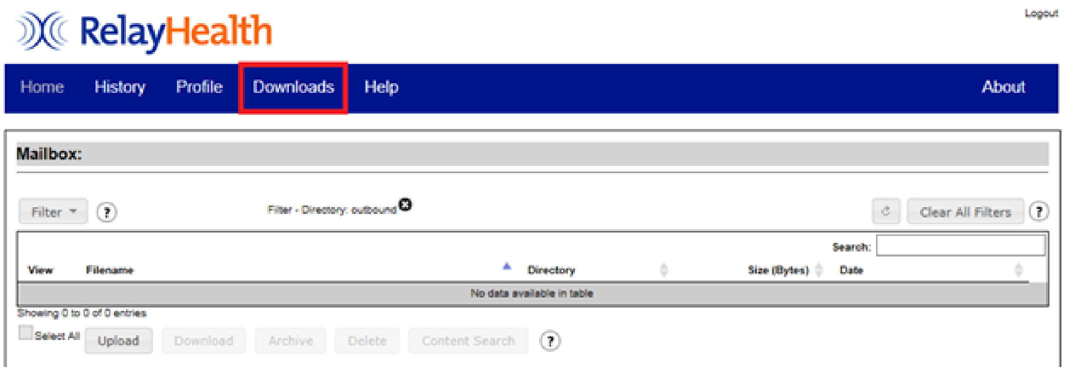


Figure 49. RelayHealth screen

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

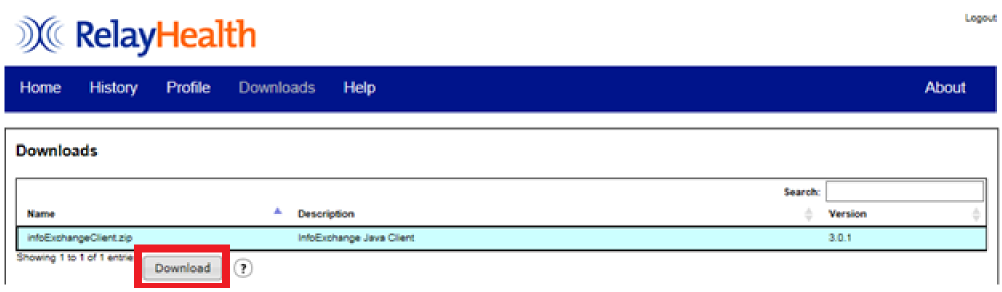


Figure 50. RelayHealth screen

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.

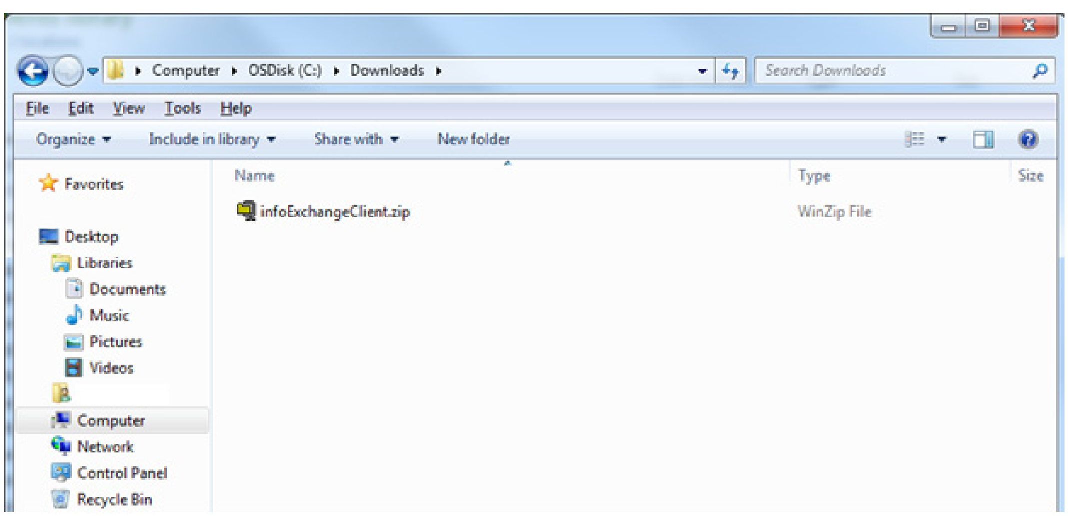


Figure 51. My Computer screen

9. After unzipping/extracting the file, open the extracted contents and locate the file labeled “infoExchangeClient.jar.” Copy this file.

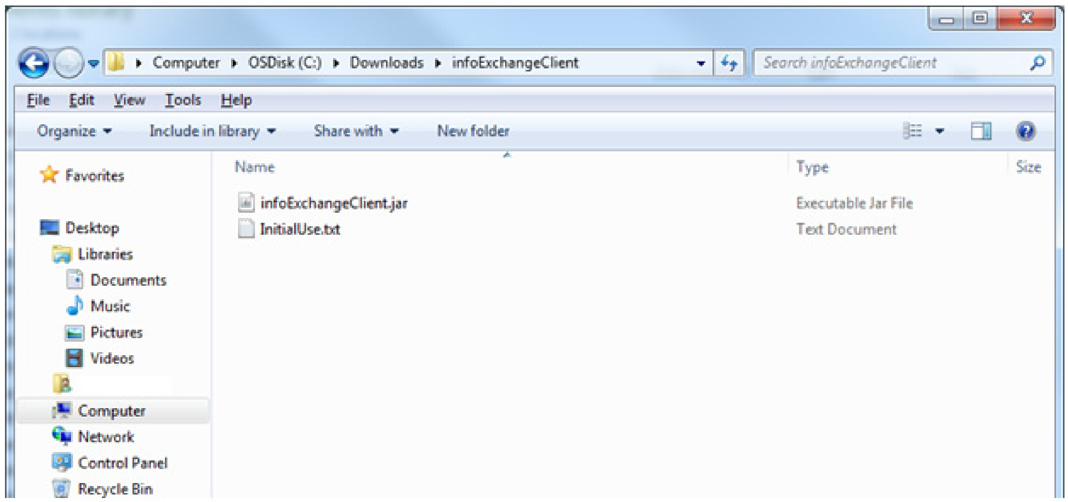


Figure 52. My Computer screen

- 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.

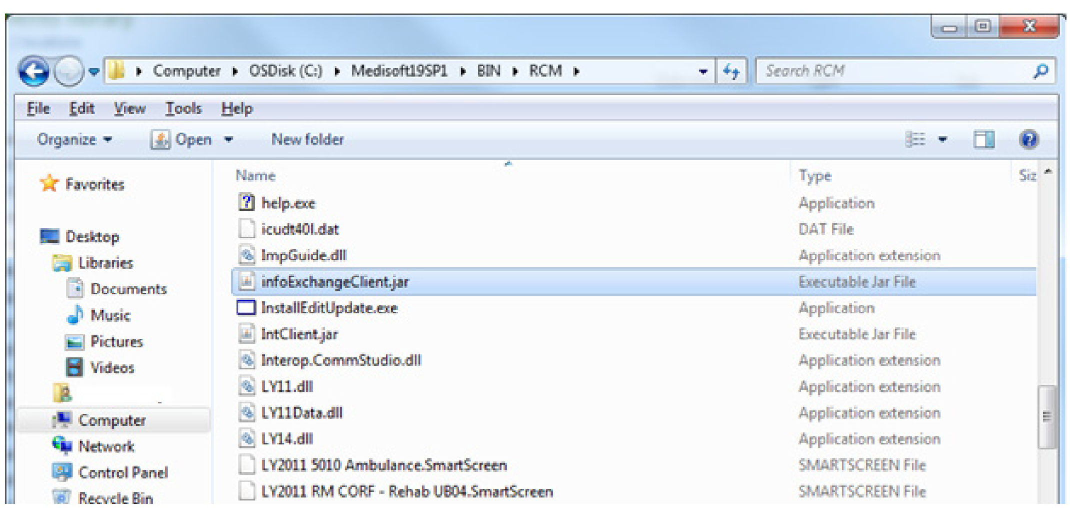


Figure 53. My Computer screen

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.

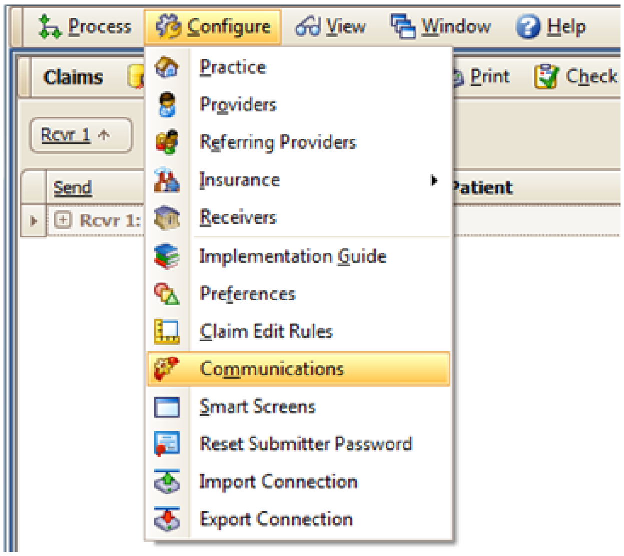


Figure 54. Configure menu

3. Locate the communication session labeled “RELAY.”

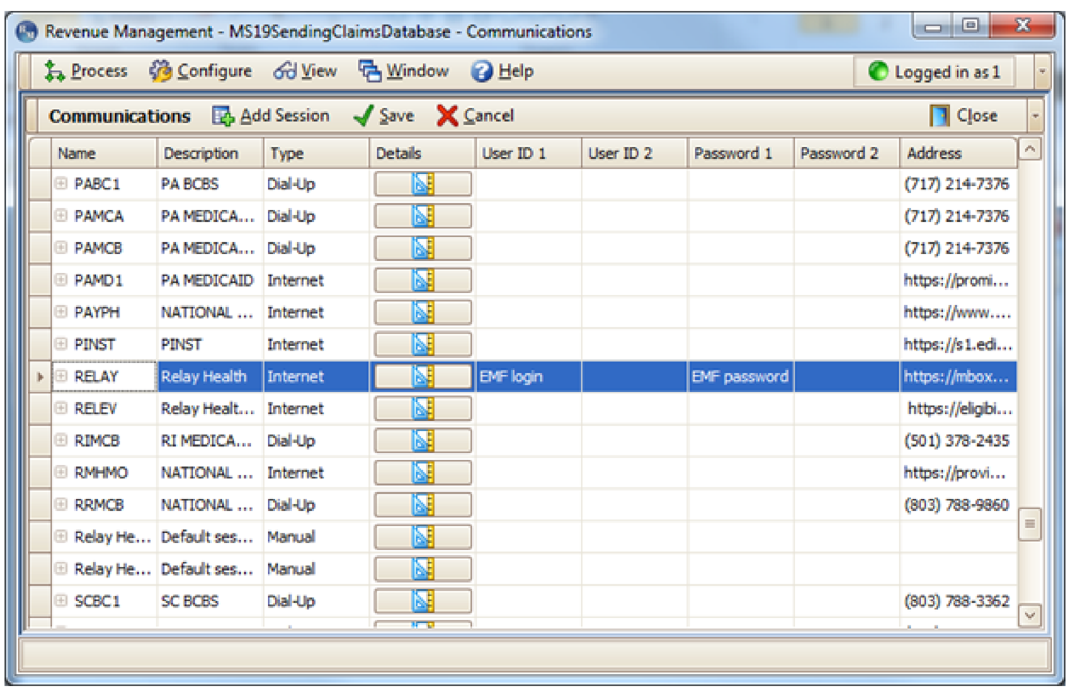


Figure 55. Communications screen

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

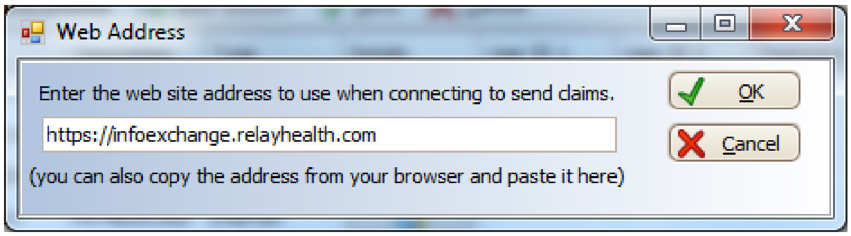


Figure 56. Web Address screen

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.

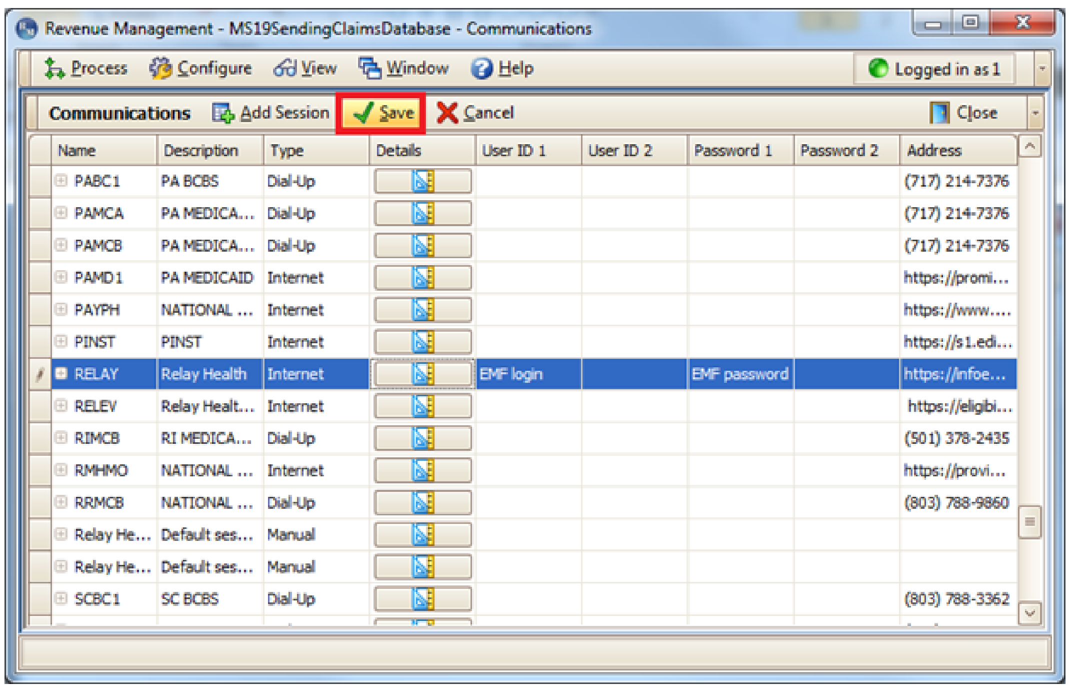


Figure 57. Communications screen

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.

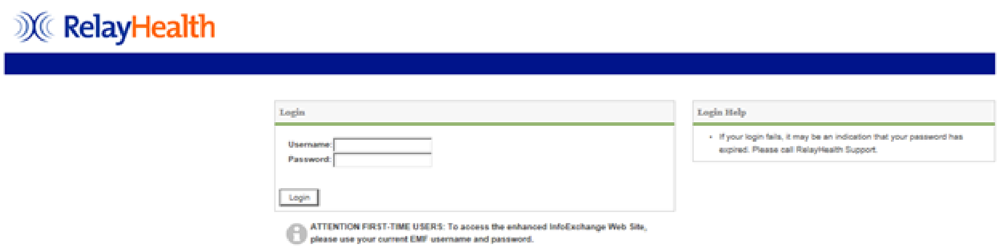


Figure 58. RelayHealth Login screen

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

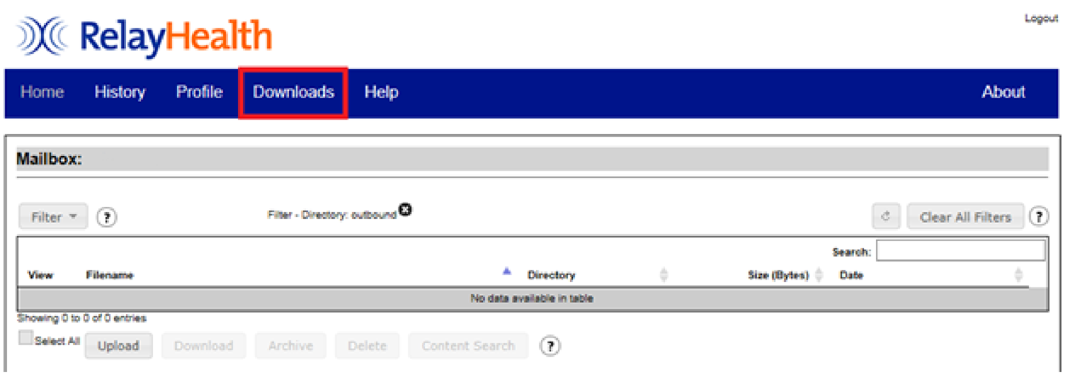


Figure 59. RelayHealth screen

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

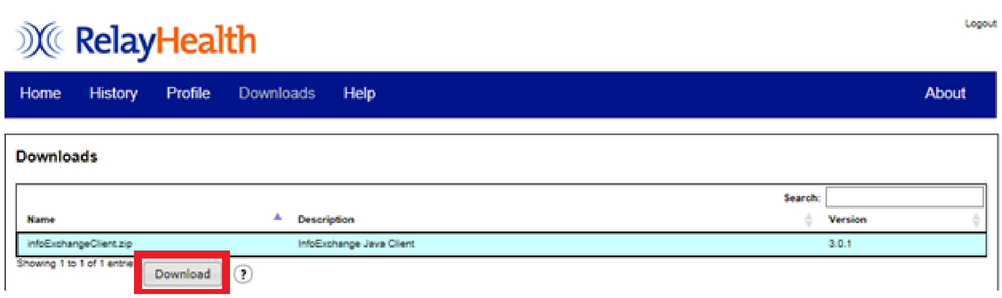


Figure 60. RelayHealth screen

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.

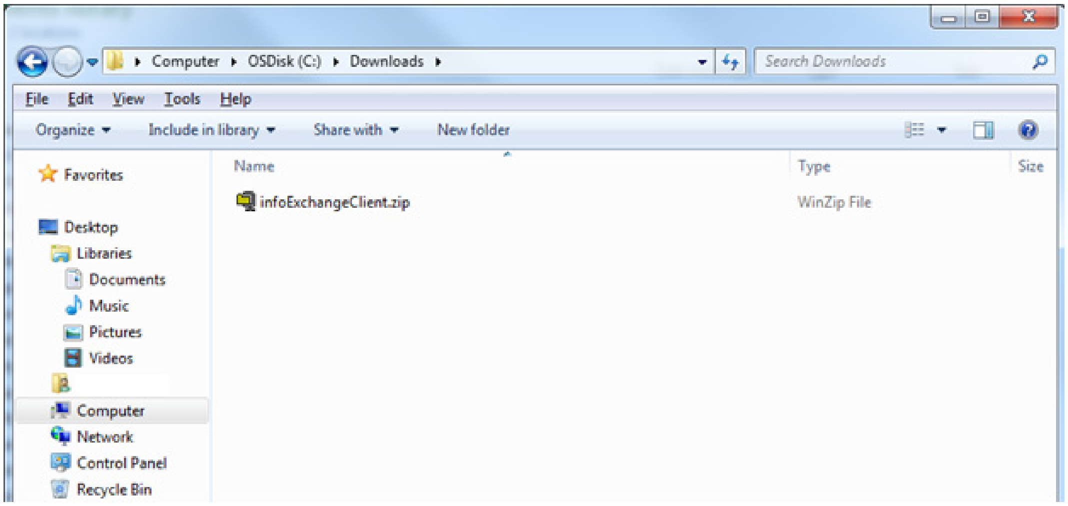


Figure 61. My Computer screen

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

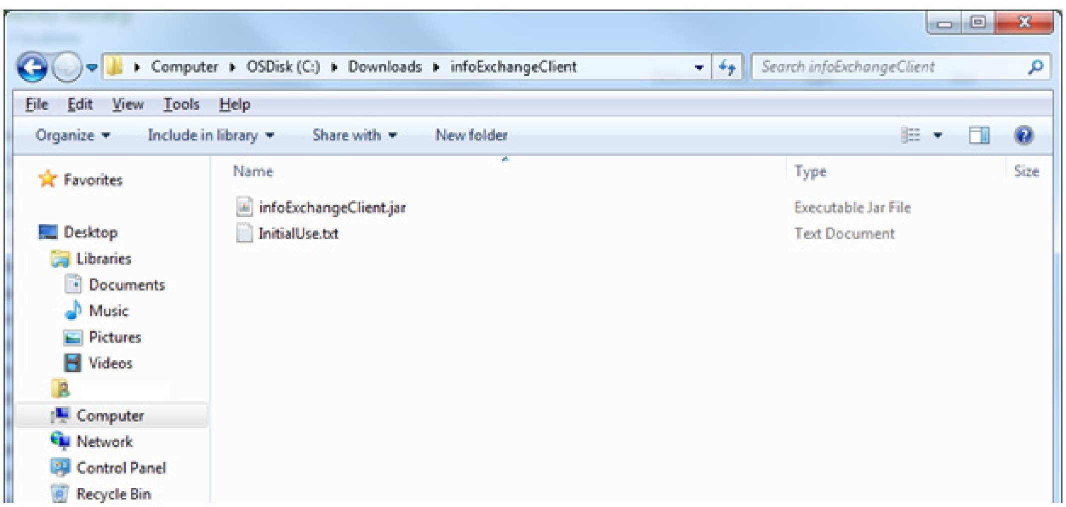


Figure 62. My Computer screen

- 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.

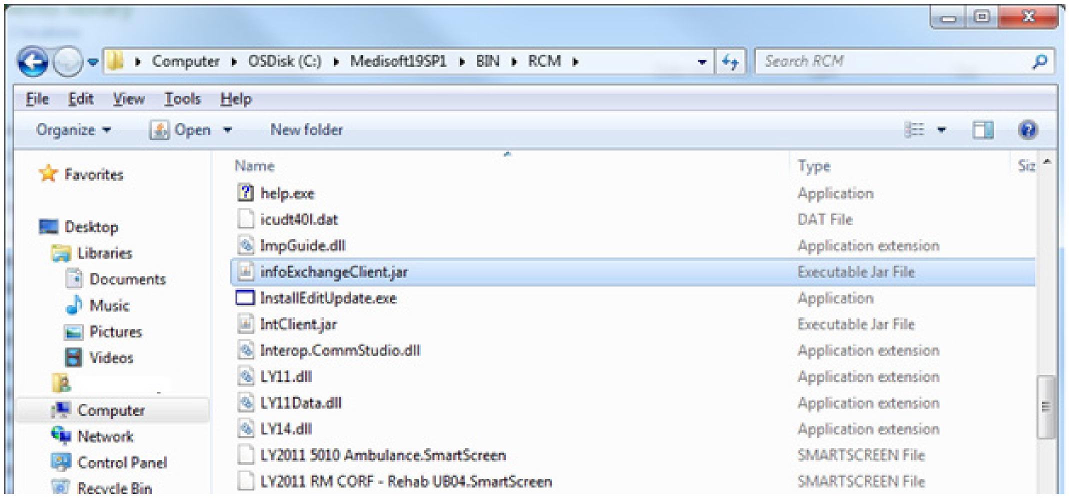


Figure 63. My Computer screen

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.

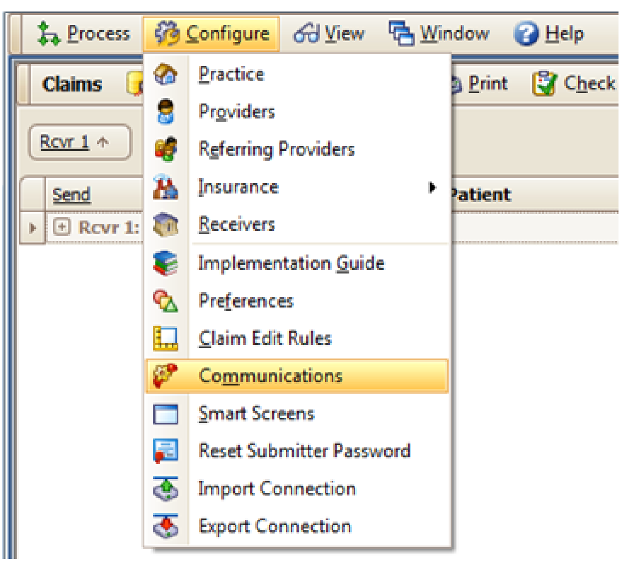


Figure 64. Configure menu

3. Locate the communication session labeled “RELAY.”

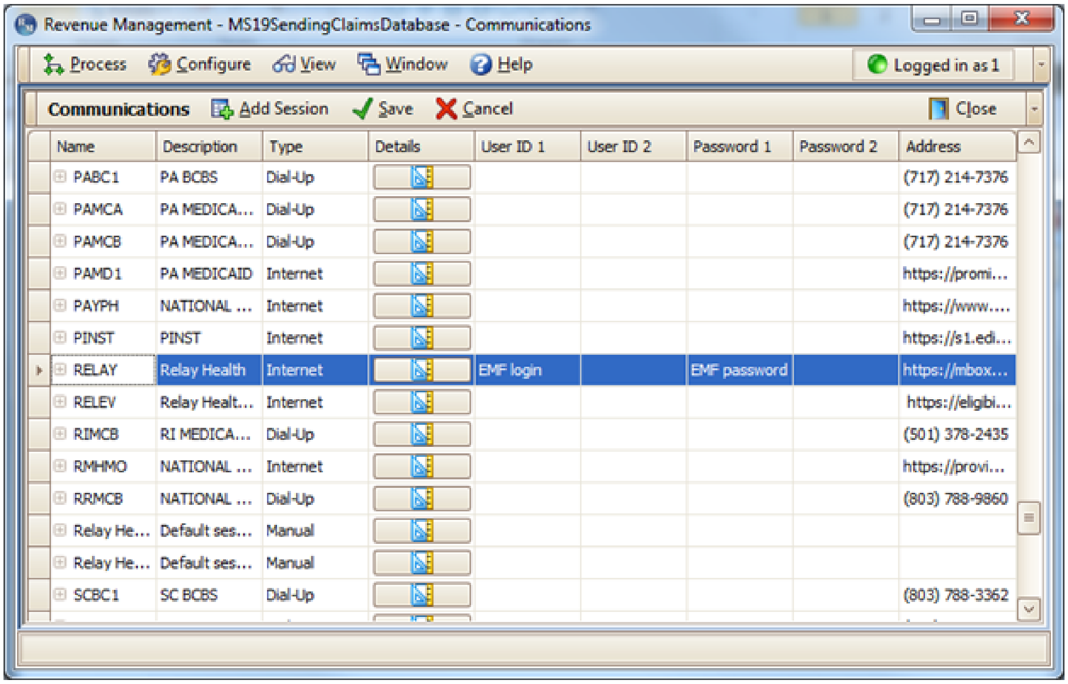


Figure 65. Communications screen

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

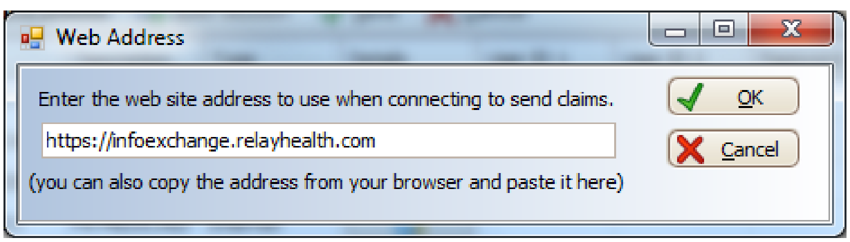


Figure 66. Web Address screen

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.

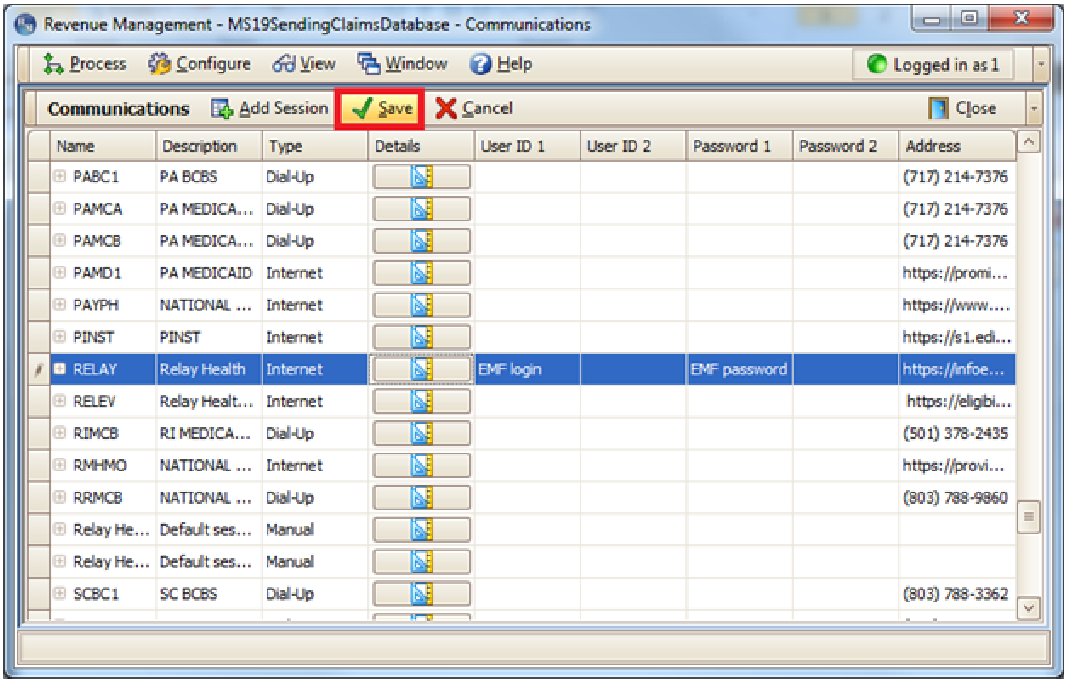


Figure 67. Communications screen

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.