

EHR System Updates

Production Release December 2022

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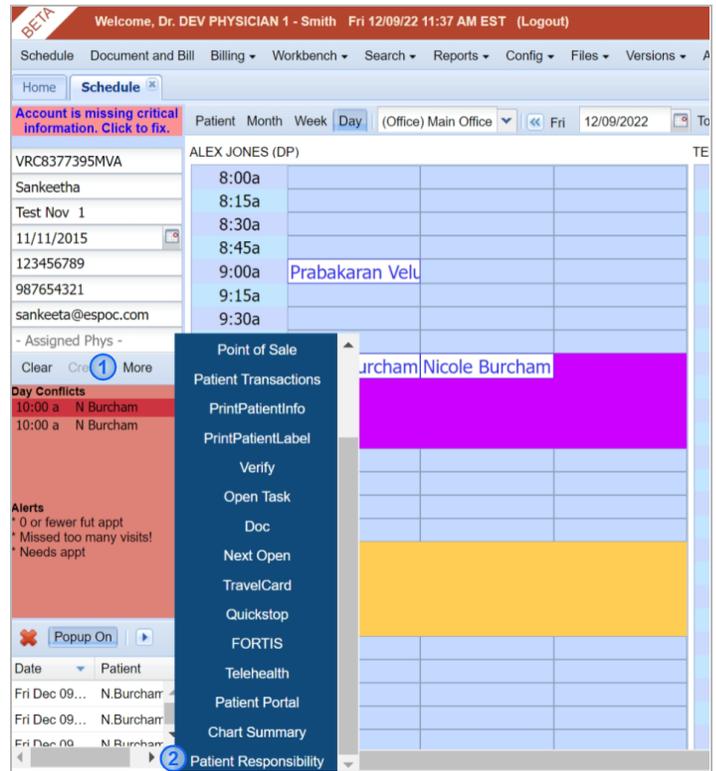
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Patient Responsibility Estimator

This new feature allows the practice to view estimated patient responsibility from the scheduler.

To view the Estimated Patient Responsibility window:

1. Click the More button
2. Then click Patient Responsibility



A pop-up will appear that shows the estimated responsibility of the patient.



The window displays the amount of money that needs to be collected from the patient, the estimated patient responsibility, estimated patient responsibility for that day, patient balance from past visits, and the detailed information of all the transactions with that patient.

This can be used by the practice to view, in advance, the estimated balance and responsibility of the patient so that they will be ready to charge or inform the patient.

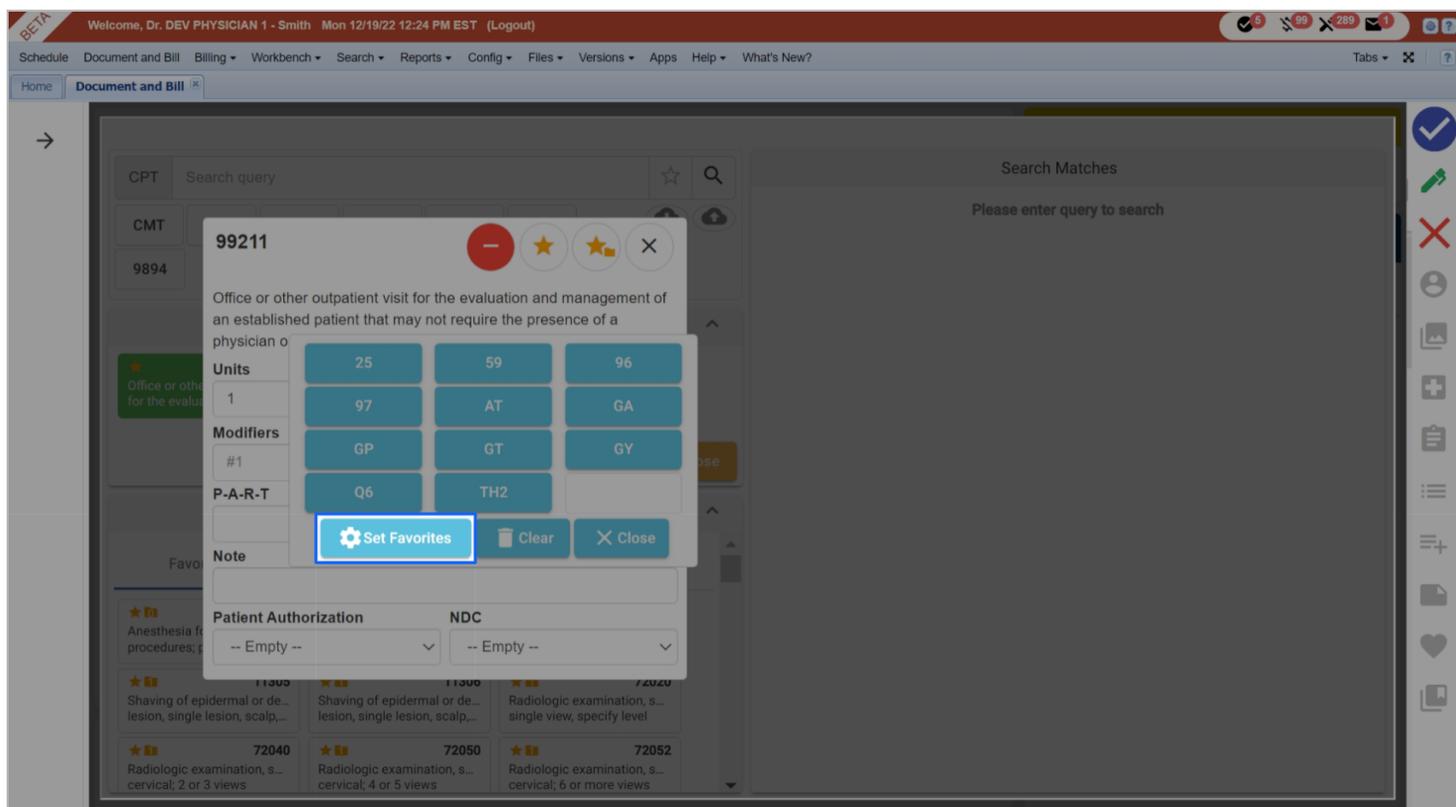
Billing Widget Update

Modifiers can now be set as favorite

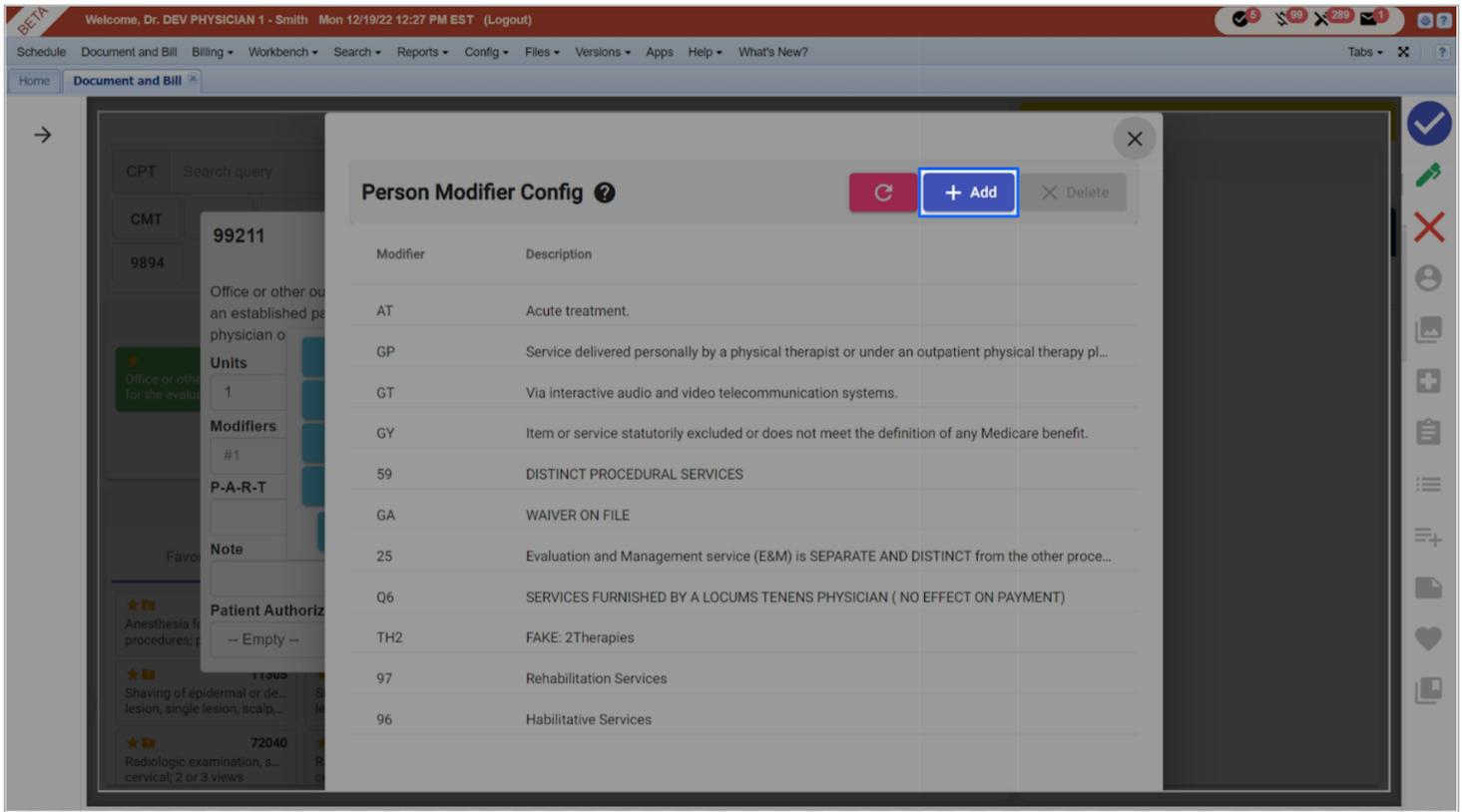
This update allows clinicians to set Favorites for their ICD/CPT modifiers to allow easy documentation of the most common encounters for the practice.

When clinicians need to add modifiers to their CPT codes, they can choose the appropriate modifier from a set of favorites.

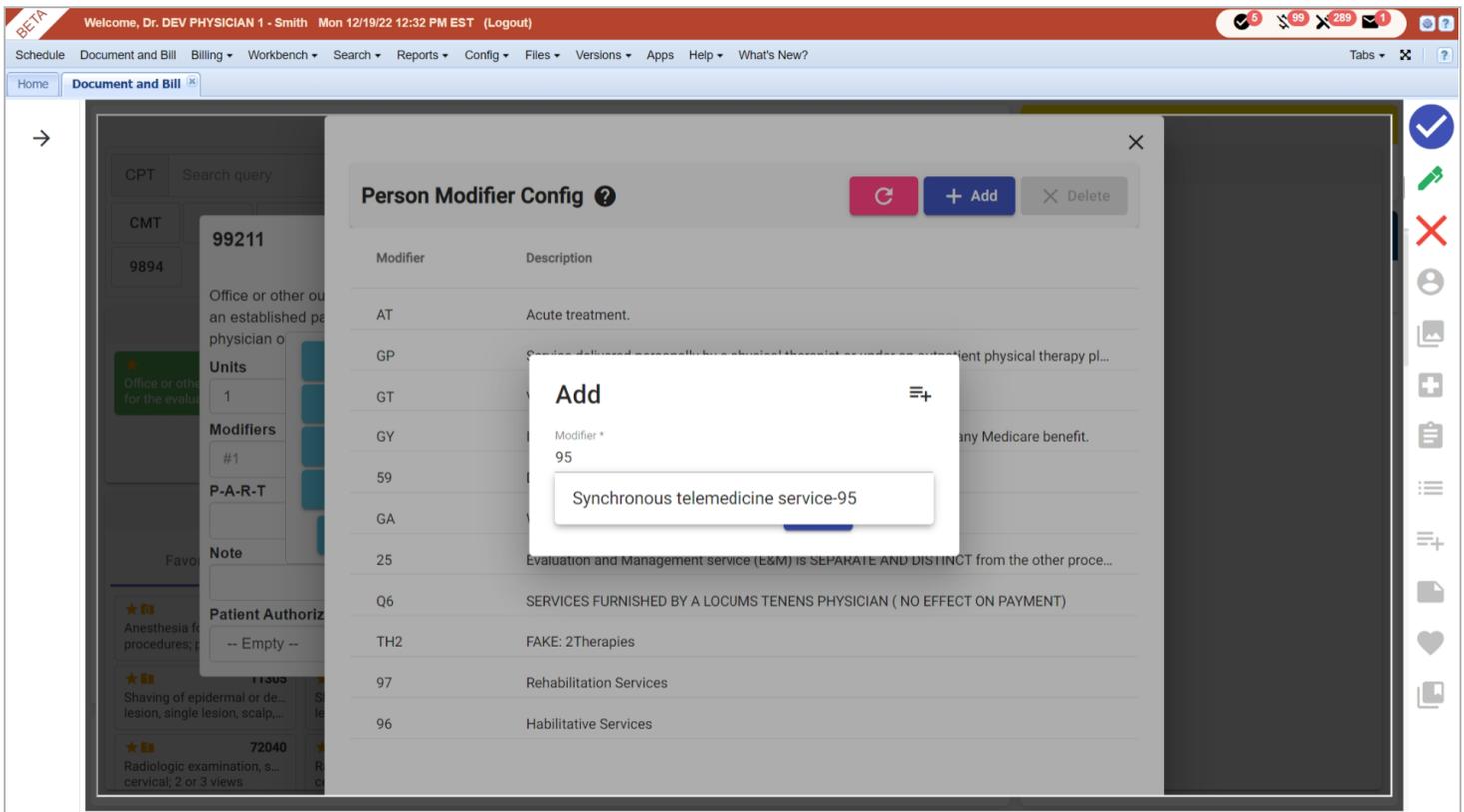
To add a modifier not currently in the list of favorites:



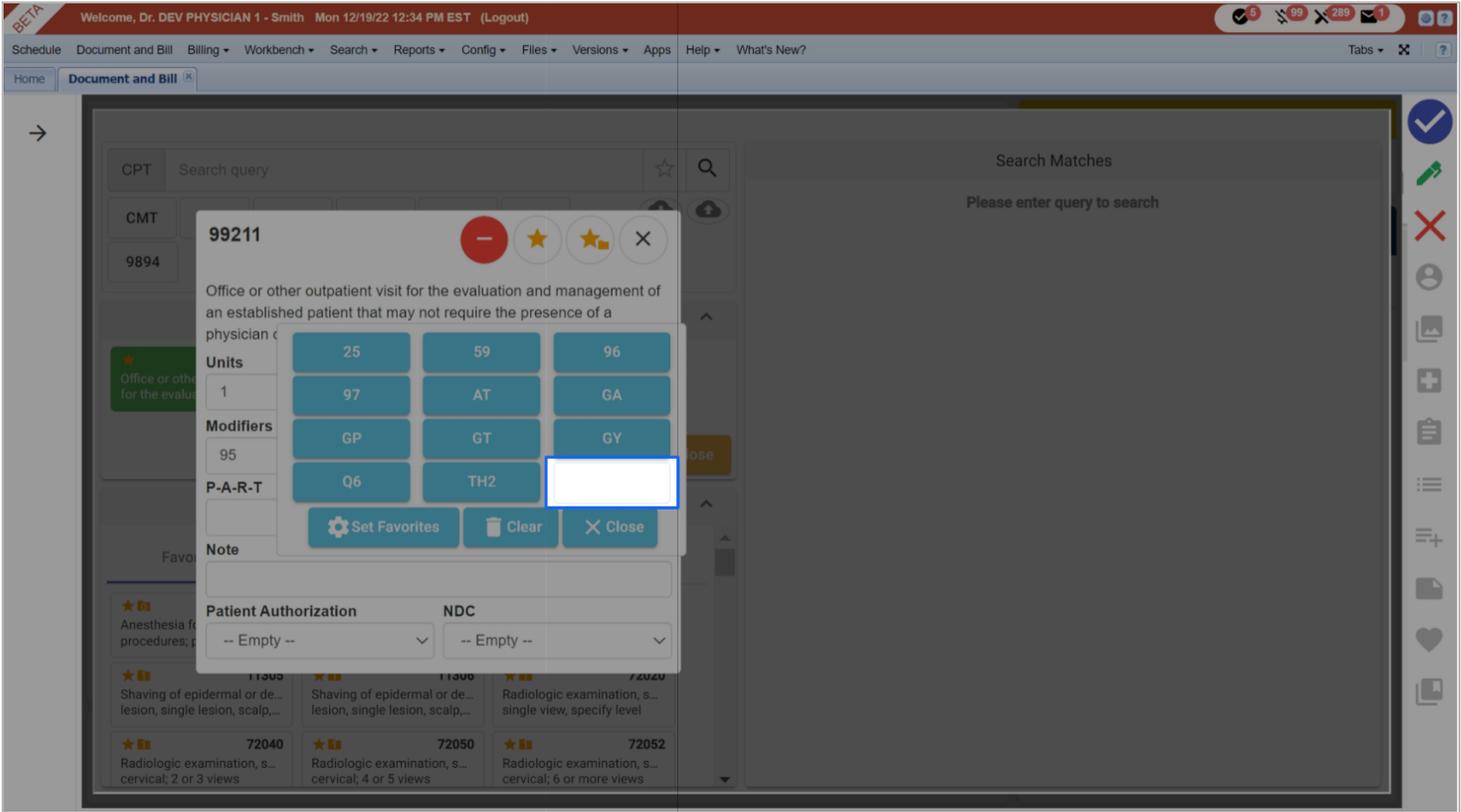
1. Click on the **Set Favorites** button.



2. Click on the **+Add** button at the upper right hand side of the pop-up.



3. Type the code in the empty text box and select it from the list before clicking **Save**.



Clinicians can use a modifier not in the list by inputting the code using the empty text box in the modifiers pop-up.

Auto Check-out by Appointment Type

This new feature allows the user to check-out patients based on appointment type.

- Please contact your Coach to learn more and enable this feature.

Schedule Alerts

A new alert option has been updated to include Patient Balances that are Over or Under a set threshold.

The screenshot shows a web application interface for a medical professional. The top navigation bar includes 'Schedule', 'Document and Bill', 'Billing', 'Workbench', 'Search', 'Reports', 'Config', 'Files', 'Versions', 'Apps', 'Help', and 'What's New?'. The 'Config' menu is open, showing options like 'My Profile/Change Password', '3rd Party Services', 'Payer', 'Practice', and 'System'. The 'Practice' option is selected, opening a sub-menu with 'Attachments', 'Billing', 'Contacts', 'Careplans', 'Documentation', 'EHR Connections', 'Front Desk', 'Logins', 'Patient Portal', 'PHI', 'Reports', and 'Settings'. The 'Front Desk' option is selected, opening another sub-menu with 'Kiosk Customizations' and 'Point of Sale'. The 'Schedule Config' option is selected. The main content area shows a table of alerts with columns 'Name' and 'Description'. The 'CheckIn Notifications' tab is selected, and the 'Last visit was over 30 days ago' alert is highlighted. Below the table, there is a search box for the alert name.

Name ▲	Description
Balance Over Rule`	Patient has a credit less than \$100
Birthday Notification	Happy Birthday!
CHUSA	Patient has CHUSA, check expiration.
Last ReExam more than 25 days or...	Last ReExam more than 25 days or 12 visits ago
Last visit was over 30 days ago	This patient must be re-examined. They haven't been in for at
MEG CP TESTING	This CP CPT is exactly 1 visit from Max Total
MEG CP TESTING-CP EXPIRATIO...	This CP CPT is expiring in 10 days or less
Missed Visits	You have missed 3 visits in the past 30 days or in the past 12 visits
New care plan	Schedule visits and Care plan

Schedule Alerts can be viewed by clicking:

1. Config
2. Practice
3. Front Desk
4. Schedule Config

Under Schedule Config click on:

5. CheckIn Notifications

This new feature can be viewed by:

1. Selecting a notification by clicking on the line to show the notification details.
2. Clicking on the Edit Rule button.

From the newly opened window, find the following two rules along with copay inclusion:

1. Add balance under rule
2. Add balance over rule
3. Copay inclusion

Previously, the practice would look at the patient's actual balance at the time of check-in. With this new feature, by adding the copay, before the alert is created, it will access the copay field of the patient's account and add that into the patient's actual balance. This feature works for both of the rules shown above.

This new feature removes the need for the practice to manually add the patient's current copay to their balance. The feature automatically includes the copay for the current visit to their existing balance and will notify the user if the patient's balance has reached the threshold set by the practice.

Documentation Updates

FlexNote updates

New features for FlexNote are:

1. Creating tasks within the note
2. Highlights for unreviewed fields
3. Addendums for completed notes

Creating tasks within the note

Tasks can now be created from within FlexNote.

The screenshot displays a 'Consultation Note' interface. At the top, the title 'Consultation Note' is shown. Below it, metadata includes 'Consultation Note', 'Created: 12/16/2022 at 2:27 PM', 'Encounter: 8/19/2022 at 11:30 AM', and 'Service Date: 8/19/2022'. A toolbar contains various editing tools. A blue circle with the number '1' highlights the text 'Advised to follow up with another appointment on 01/07/2023' which is highlighted in grey. Another blue circle with the number '2' highlights the 'Add Task' button in the toolbar, which is represented by a checkmark icon.

This feature can be done by:

1. Highlighting the text (used as the task title)
2. Pressing the Add Task button.

Add New Task

Title

Priority

Low
 Normal
 High
 Critical

Assign To

Person
 Role

Due Date

Remind me day(s) before

🔔 Reminder Set on 01/05/2023

Task Details (Optional)

Paragraph B I U

Attachments (Optional)



[Choose a file](#) or drag here..

The new task window will pop up with the highlighted text as the task title. Additional Task details can then be set such as the **Priority Level, Assigned Person or Role, Due Date, Remind Me(Start Date), Task Details, and Attachments.**

After checking the details, click on the Add Task button. The task will now be created and visible on the owner's workbench.

This feature can be useful for internal reminders such as following up on future patient appointments.

Highlights for unreviewed fields

Unreviewed Fields will now be highlighted to remind the clinician to check the data if there are any relevant changes that should be updated.

Note:This feature only works with auto-salted notes, which have fields that contain prior information.

Addendums for completed notes

Clinicians can now add addendums to completed notes.

History & Physical

History & Physical ▼ Created: 12/16/2022 at 2:22 PM Encounter: 8/19/2022 at 11:30 AM Service Date: 8/19/2022

Signed 12/16/2022 at 03:13 PM by KENNETH TAINO

Document is hard signed (read-only)

⋮ ? 🚩 ⚗️ 🔑

NEW PATIENT – 99202 – KEY FACTOR: TIME

This is a new patient evaluation for: Tester, Teresita
Date of service: 8/19/2022
Chief complaint: headaches

Initial History: Teresita Tester, a 30 year-old of unspecified gender presents to this office on 8/19/2022 complaining of mild headaches. The patient rates the headaches at 4/10. The headaches is present about 20% of the day. The patient needs to take frequent breaks throughout the day as a result of these symptoms. The patient stated that these conditions started one week ago. Since the time of onset, the condition shows no change. Due to this condition, the patient has slight difficulty doing work-related tasks for 30 mins. Symptoms are improved with rest, and worsened by body movement. This problem has never occurred in the past. The last episode was about 1 day(s) ago. The patient has never been to a orthopedist for this problem.

Medication History: The patient is not taking any medications for this problem.

Past Medical History: The patient related no present or past problems. The patient does not have past history of surgeries.

Family History:
Patient's mother has/had diabetes.
Patient's father has/had cancer.
Patient's grandfather has/had osteomyelitis.

The patient spends a large portion of the day running. The patient spends 8 hours commuting to work each day. The patient is separated. The patient reports a moderate amount of stress at work. The patient does not have someone take care of them.

History Time: 15 Minutes

Initial Examination:
General Appearance: well developed, well nourished
Vitals: Height – {...} feet {...} inches, Weight – {...} lbs, Blood pressure – {...}/ {...}

Affected ADLs: {...}

Gait & Station: {...}
Posture: {...}
Brief Mental Assessment: alert and oriented to person, place and time
Additional Exam Findings: {...}
X-rays {...}

Exam Time: 5 Minutes

Medical Decision Making (MDM): {...} Level (see details below)

Add Addendum

U ICD:

📅 CPT:

When viewing completed notes, an **Add Addendum** button is available in the bottom right hand corner of the note.

History & Physical

History & Physical ▼ Created: 12/16/2022
at 2:22 PM Encounter: 8/19/2022 at 11:30
AM Service Date: 8/19/2022

✓ Signed 12/16/2022
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Patient's father has/had cancer.

Addendum

Paragraph ▼



Cancel

Save Addendum

 ICD:

 CPT:

Clicking the **Add Addendum** button will bring up a narrative area at the bottom of the page where clinicians can input an addendum.

Checking Physician Name

An additional field for physician names has been added in the copy pop-up in the **Doc Tab** to easily determine the name of the physician attached to the Patient's note.

Template Name	XDoc Name	Service Date	Physician Name	Date Updated
Supernote	Physical Therapy Initial Exam	08/24/22	ALBERT DAVIS	08/24/22 1...
Insurance Verification Level 1	Insurance Verification Level 1	03/08/22	ALEX JONES	03/08/22 1...
Supernote	Chiropractic Initial Exam	03/08/22	DEV PHYS	03/11/22 1...
Supernote	Chiropractic Initial Exam	03/08/22	ALEX JONES	03/25/22 1...
FlexNote	Initial Exam - Knee	03/08/22	DR. JOHN	04/19/22 1...
***Beta - Supernote	Chiropractic Daily Note	08/07/20	DR. JOHN	08/06/20 1...
Supernote	Chiropractic Initial Exam	08/06/20	DR. JOHN	08/06/20 1...
Supernote	Chiropractic Initial Exam	08/05/20	DR. JOHN	09/28/20 1...

Updating existing macros

Added a new confirmation dialogue when updating existing macros to avoid unintentional overwriting.

Name	Provider
ATLANTIC CHIRO ASSOC - SUPERNOTE	123456789DEV
9/2 test macro initial	123456789DEV
9920225	123456789DEV
9920425	123456789DEV
A	123456789DEV
ADJUSTMENT 3-4 REGIONS	123456789DEV
ADL Testing Macro	123456789DEV
ADL test	123456789DEV
Arcadia Knee Test	123456789DEV
Assessment only test	123456789DEV
Back Procedure	123456789DEV
Blank macro test 2	123456789DEV
CHIRO PLAND 98942AT	123456789DEV
Cervicalgia Test	123456789DEV
ChiroTemplateTest1	123456789DEV
Clariant Test	123456789DEV
Daily - boxes unchecked test 03.03.2022	123456789DEV
DiabetesSampleMacro	123456789DEV
Diagnosis Macro	123456789DEV
DizzySpells	123456789DEV
Doctor Apurva	123456789DEV

Patient Portal Optimizations and Updates

New Global setting for Patient Portal links

This new setting allows the practice to choose their preferred version of the patient portal.

The new practice-level setting, `patient_portal.version`, accepts 3 values:

- CARETOME: All patient portal links will automatically be for CareToMe.
- LEGACY: All patient portal links will automatically be for the Legacy Portal.
- BOTH: Users will continue to have a toggle on the interface and be able to send a link to either version of the portal.

This update makes it easier to control which portal the practice uses.

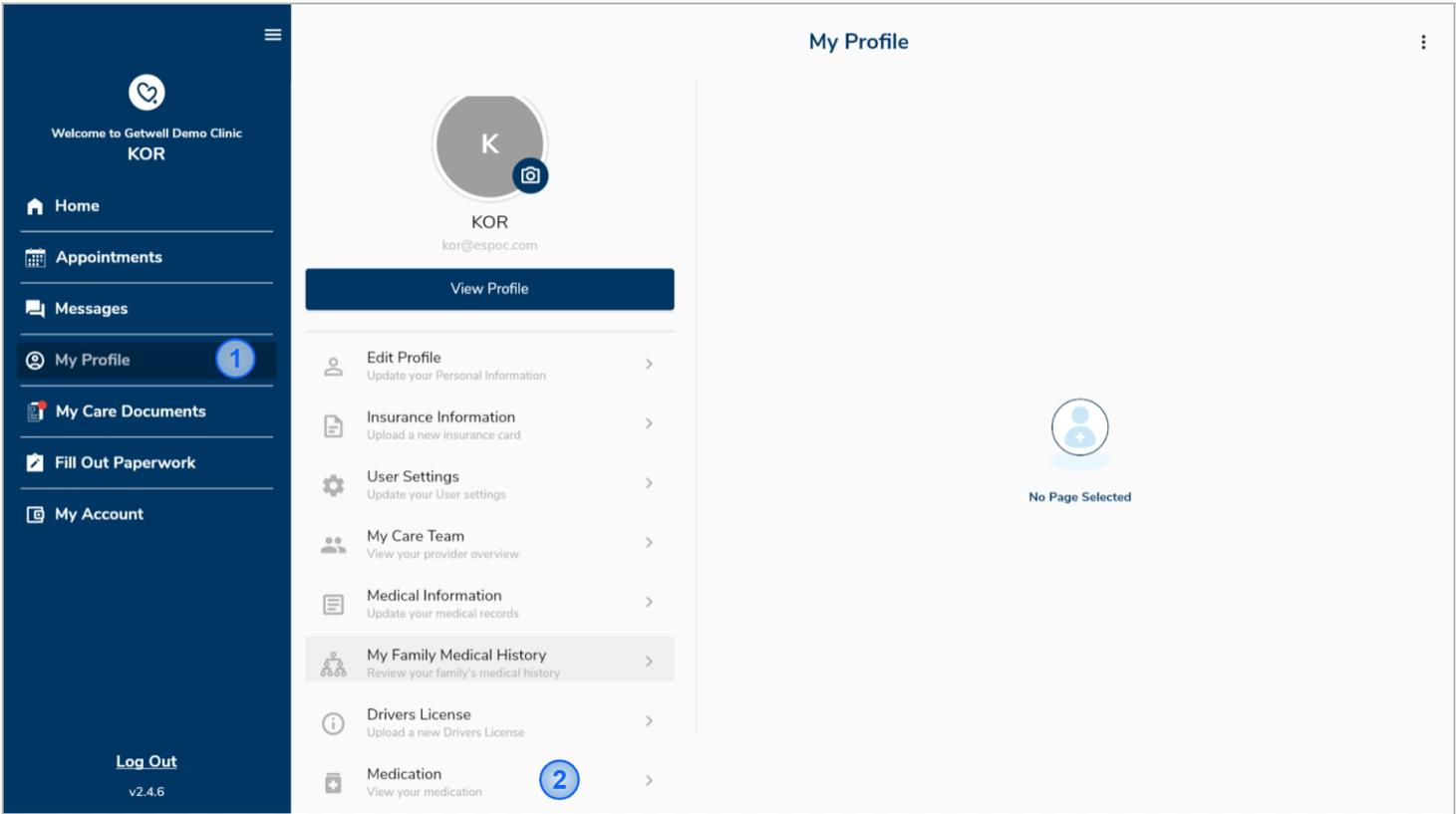
Logging

Patient portal logs include which version of the portal was used, the actual link sent, as well as the delivery method whether it was directly from the system or copied to be sent as an email.

CareToMe Patient Portal Updates

Providers can have the Medications Chart Component viewable by patients on CareToMe.

The screenshot displays the 'My Prescriptions' page in the CareToMe patient portal. On the left is a dark blue navigation sidebar with the following items: Home, Appointments, Messages, My Profile, My Care Documents, Fill Out Paperwork, My Account, and a Log Out button at the bottom. The main content area is titled 'My Prescriptions' and features a 'Back to My Profile' link. Below this are four prescription cards, each with an 'Active' status indicator in a green box. The first card is for Escitalopram Oxalate (20mg / null, Add'l Sig, Sep 07, 2022). The second is for Adderall X R (dextroamphetamine-amphetamine) (25mg / Take 1, Add'l Sig, Sep 29, 2020). The third is another Escitalopram Oxalate card (20mg / null, Add'l Sig, May 12, 2020). The fourth is for Hydralazine (10mg / Take 1 tablet by mouth daily, Daily, Oct 20, 2022). A vertical scrollbar is visible on the right side of the main content area.



This feature can be accessed in the CareToMe Patient portal by:

1. Clicking on **My Profile**
2. Clicking on Medication

Reports

Appointment Type Summary report can now display the unique patient count for each appointment type by hovering over the total number for a specific provider.

BEETA Welcome, Dr. DEV PHYSICIAN 1 - Smith Mon 12/19/22 11:21 AM EST (Logout)

Schedule Document and Bill Billing Workbench Search Reports Config Files Versions Apps Help

Home **Appt Type Summary** Schedule Config

Physician Appointment Count Report for 12/19/2020

ID	NAME	ADJUST	ADJUSTMENT & EXAM	ADJUSTMENT	ADJUSTMENTS	ARMAND APPT	C
TRACYDAVISDEV	TRACY DAVIS			3			
LICTEST123	TEST SCHEDULE FOR ARMAND			2			
111112	TEST DEV						
85789	TEST ACTIVE			1			
DEVEVENTS	TELEHEALTH			8			
FLDEVPHY004	STEVEN DREW						
NJDEVPT0001	PHIL THEREN			3			
NJMASS003	MARY MILLS			8			
BE1PHYSICIAN4	LETS DO THIS			3			
APIUPDATETESTB	FIRST TEST						
1992	DR. UNICORN	1	2	19		1	
NJDEVPHYS001	DR. JOHN	2	14	210	1	1	1
NJDEVPHYS008	DEV PHYS		3	9			
C1PHYSICIANCOM153	C1PHYSICIAN COM153						
C1PHYSICIANCOM139	C1PHYSICIAN COM139						
C1PHYSICIANCOM117	C1PHYSICIAN COM117						
NJDEVPHYS002	ALEX JONES	7	27	72	5		1
ALBERTDAVISDEV	ALBERT DAVIS						
AJIATEST	ADJUSTMENTS		4	7			
		10	50	345	7	2	2

Items: 19 From: 12/19/2020 To: 12/20/2022 Search

Unique patients = 75

System Updates

Kiosks

- When multiple appointments for the same patient are checked in at the same time, the kiosk now only shows one copy of the configured documentation.

Reports

- Monthly Invoice
 - Added a “Confirm All” button to automatically mark all entries as confirmed, preventing users from having to click each item in the report.

XDocs

- Supernote has been optimized for better speed & performance.
- Added a fix for pop-up windows opening beyond the screen preventing access to the close button.

App Store

- App Store will now always be visible for users listed as their owners, even if the store is limited in visibility (eg, provider tags)

Billing & EHR

- Menu → Task Checklists
 - Task checklists are now alphabetized for ease of use.

FIC Map

- Now has a new interface for easier searching & updating of FIC Mappings

Third-Party Apps

- WebExercises is now updated to use the full amount of available screen real estate
- Kaizenovate is now available in production servers.

Tasks

- Billco-configurable User Role options
 - The list of user roles available when practices open a new task can now be limited to simplify task creation for practices.
 - `task.allowed_user_role_for_new_task`

Service Facility

- Added a warning when making updates that affect facility visibility for practices that have user(s) with limited service facility access.

Bug Fixes & Minor Changes

- Fin tab
 - Automatically remove extra whitespace in the AMT fields (prevent error when hitting Dist w/ a non-number in the amount)
- EMR Not Created
 - Fixed issue where switching from cash to non-cash physician would prevent saving XMR in some cases
- Provider Edit > Settings (basic)
 - Prevent IH practices from setting up automatic PIP write offs (NJ PIP Capitation)
 - Automated write-offs do not work with the IH PIP Process; they happen before the claim can be submitted.
- Fixed issue with date range in Communication Logs
- Bill & EHR → CPT Widget
 - Fixed issue where widget would close immediately upon adding dx link
- Fixed error shown when searching for POS code
- Scheduler
 - Fixed issue where appointment & patient counts did not update when switching between day & week view multiple times
- Careplan
 - Users can now delete the note from an existing careplan (previously would not allow content to be cleared completely)
- Login
 - Logouts caused by inactivity will redirect to the new login screen
- Fixed the drop issue of the NDC Selection in the Billing Preview Screen of Document & Bill.
- Layout issue
 - Fixed issues where Copy... popup would be obscured by the navigation toolbar
- Patient Account → Files
 - Prevent adding duplicate entries, resulting in showing the same file twice (and “both copies” being deleted in a single action)