medisoft®

Medisoft v15 Workflow Improvements

V15 New and Enhanced Features

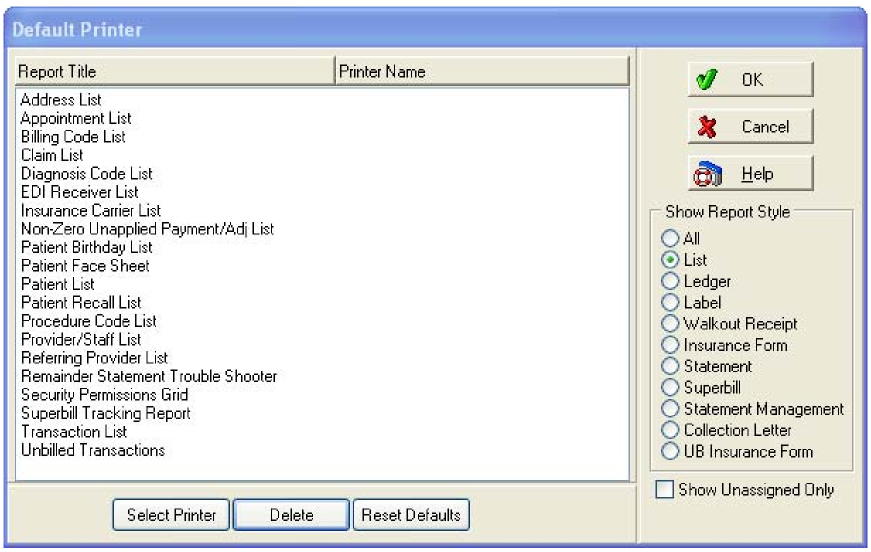
Medisoft Version 15 has numerous new and enhanced features that improve workflow and efficiency from the first step in the patient encounter cycle, scheduling an appointment through the final step of collections and beyond to file maintenance. This session will guide you through the enhancements in a logical workflow process, emphasizing best practices developed through many years of product use.

Program Wide Functionality

Default Printer Option

Users can now specify default printers for Superbills, Claims, Statements and Reports. When any of these items are printed, Medisoft will automatically select the printer that was defaulted. The user will be able to change from the default. Defaults will be stored on a per-workstation, per-login basis. If the users do not have a default for a report it will print to the printer that they have set at default in their Windows settings. This feature is only available in Advanced and Network Professional.

To set up default printer options, click on the “Reports” menu then ‘Default Printer Options’.



Choose the ‘Report Style’ from the list to limit the type of reports viewed. If you want to have all of the reports listed print to the same printer, then choose the entire list by clicking the first report and hold your shift key and click the last item in the list. If you only want selected reports to default hold your Control Key and choose the reports you want to print to the specified printer. Click ‘Select Printer’ and the Windows printer selection window will appear. Choose the printer and default settings for the reports and click “OK”. The printer name will be displayed next to the report title. When you are finished selecting default printers, click ‘OK’ to close the window.

Chart Number Hot-key

A new shortcut has been added to automatically populates the last accessed patient’s chart in a chart number field. For instance, if you go to the Patient List and open a patient’s record and then close the window and go to another window such as Transaction Entry, you can select the Chart field and press **SHIFT + F4** to populate the patient’s record. When finished in Transaction Entry, you could run a report and use the shortcut to populate the patient’s chart number from Transaction Entry. This feature is supported in many windows throughout the system.

NOTE: Reports that do not use the Data Selection Questions window for data filtering, do not support this feature.

Quick Ledger Edit Option

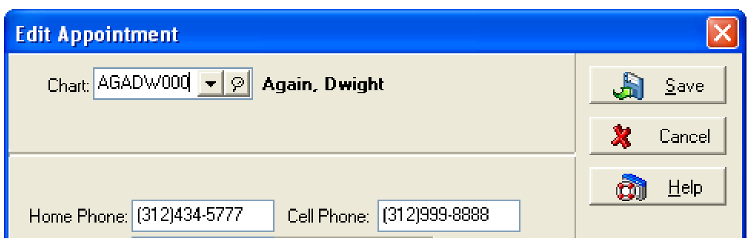
Both the Patient and the Guarantor Ledgers now let you add and edit the notes entered for transactions in the grid. Click the **Note** button or press **F5** to display any notes attached to the transaction. If a note is not yet attached, you can enter a note.

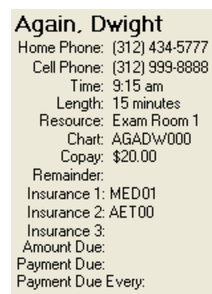
Office Hours

Phone Numbers in Appointment Entry

The appointment entry window now shows both the home and cell phone numbers for the patient.

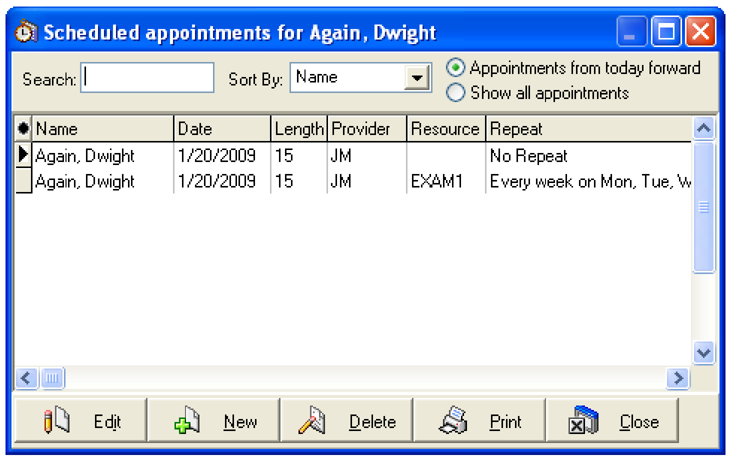
Both numbers will now also show on the left side of the schedule when an appointment is highlighted.





Future Appointment Warning

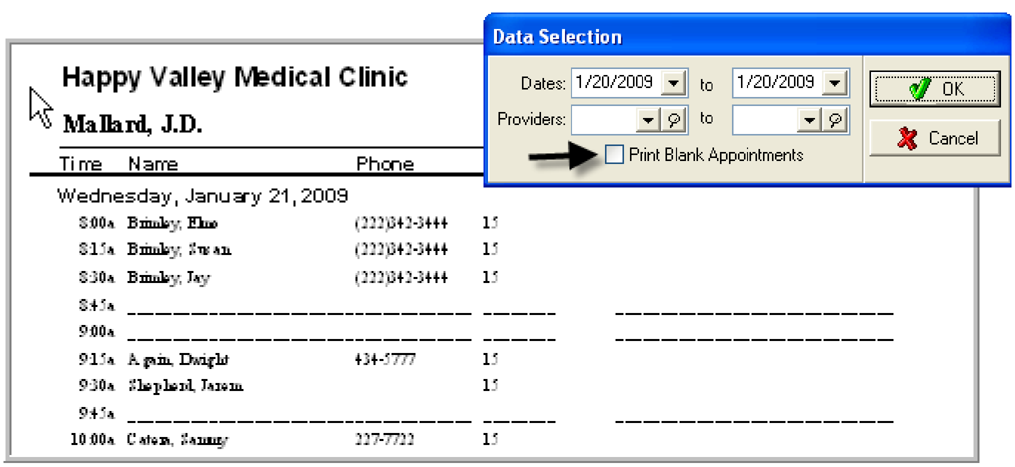
In Office Hours Professional only, you will now have an alert in the appointment entry window which will allow you to see any future appointments scheduled for that patient. When you click on the magnifying glass next to the alert a list of future appointments will display.



Blank Appointment Indicator

Office Hours Appointment Report will now include blank appointment slots on the report if the user selects the 'Print Blank Appointments' box. This will give users a more accurate schedule when printed.

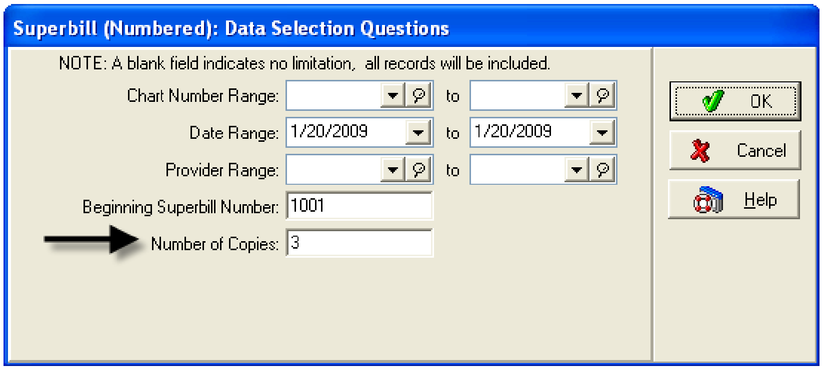
In Office Hours, click on 'Reports' and choose 'Appointment List' and check the 'Print Blank Appointments' box.



Print Blank Superbills

You can now print as many blank Superbills as needed without being required to enter an appointment for walk-in patients, etc… Users must have a new security option checked to allow users to print a blank Superbill.

Click on 'Reports' and 'Print Blank Superbills'. Enter the number of blank superbills you wish to print and click 'OK'.



Sorting in Transaction Entry and Claim Management

Case Sorting

The sort on the Case drop down within transaction entry is showing in descending order. This will place the most recently created case at the top of the list, rather than at the bottom.

Transaction Entry Sort

Users can sort by all columns in ascending and descending order and will be remembered.

Claim Management Sorting

The sorting in Claim management will be saved on a per-workstation, per-login basis.

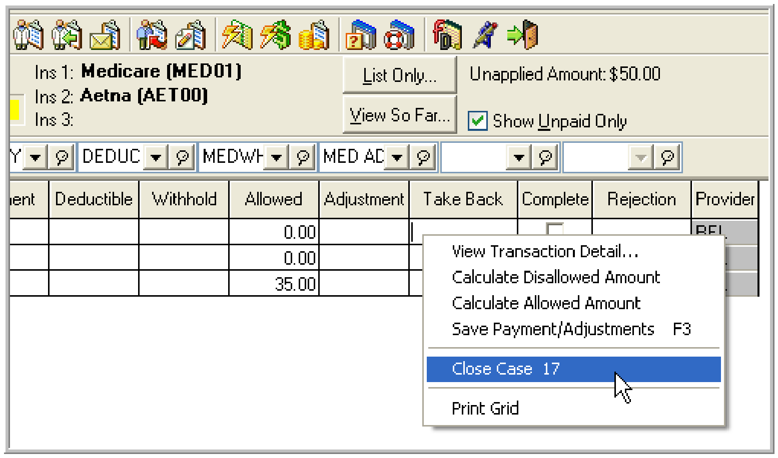
Deposit Entry

Rejection Code Hot-key Addition

Within the Apply Payments to Charges screen in the Deposit List, you can now add Rejection Codes and messages without having to leave the screen and use the List/Rejection Messages window. Simply press F8 to add a new message, or select an existing message and press F9 to edit.

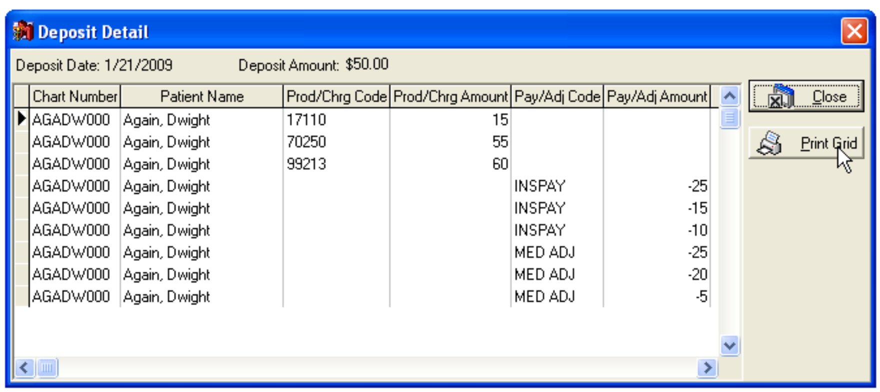
Close Case Shortcut

Right click on a transaction in the deposit list in the Apply Payment to Charges screen, and close the case in which that transaction resides.



Deposit List Detail Print

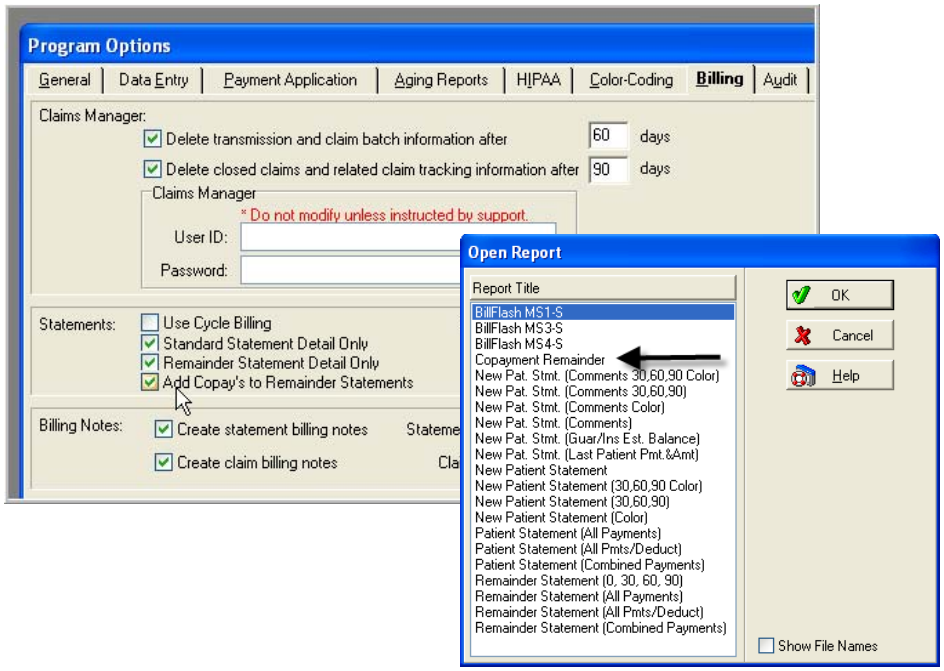
The Deposit List Detail window can now be printed by clicking on the new 'Print Grid' button on the right side of the window. This can be helpful for finding discrepancies between an EOB and what has been posted by allowing users to print the detail and compare. Additionally, the printed version will show the dates of service and procedures for the charges to which the payment was applied.



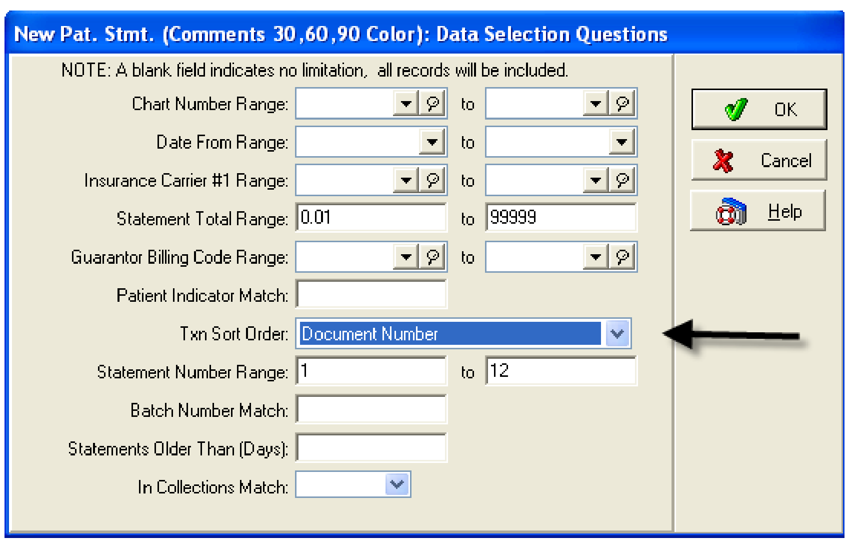
Statement Management

Missed Co-pay Remainder Statement

A new remainder statement showing missed co-pays has been added. This statement will include missed co-pays in the total amount due. In order for this statement to function properly you must turn this function on in Program Options by selecting the Billing Tab and checking the box. This statement functions with Statement Management statement formats only.



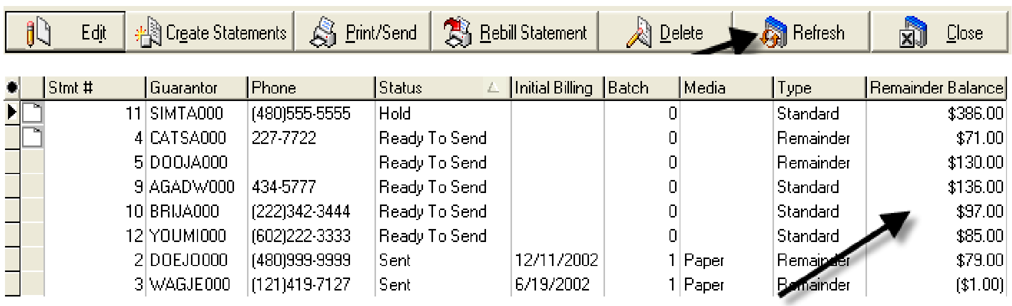
Sort Statement Option



An option in Data Selection Questions in Statement Manager allows users to sort statements by either Date of Service OR by Entry Order OR by Document Number.

Remainder Balance

A new column in the Statement Management grid shows the remainder balance total of the transactions on each statement. Only “Sent” statements will be calculated. “Done” statements will not. If the remainder total does not appear, click the refresh button on the bottom tool bar.



Stmt #	Guarantor	Phone	Status	Initial Billing	Batch	Media	Type	Remainder Balance
11	SIMTA000	(480)555-5555	Hold		0		Standard	$386.00
4	CATSA000	227-7722	Ready To Send		0		Remainder	$71.00
5	DOOJA000		Ready To Send		0		Remainder	$130.00
9	AGADW000	434-5777	Ready To Send		0		Standard	$136.00
10	BRIJA000	(222)342-3444	Ready To Send		0		Standard	$97.00
12	YOUMI000	(602)222-3333	Ready To Send		0		Standard	$85.00
2	DOEJO000	(480)999-9999	Sent	12/11/2002	1	Paper	Remainder	$79.00
3	WAGJE000	(121)419-7127	Sent	6/19/2002	1	Paper	Remainder	($1.00)

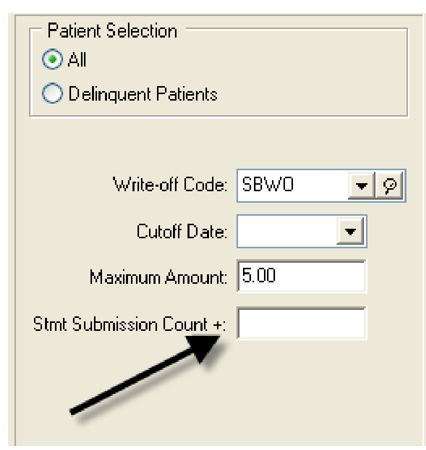
Collections

Collection List F7 Link

When F7 is pressed, the Ledger will open for whichever patient is attached to the selected collection list item.

Write-off Option

An additional option for writing off balances has been added which allows you to write off items that have been billed on statements a specified number of times. Click on ‘Activities’ and ‘Small Balance Write-off’ and enter the submission count for statements to be written off.



Data Maintenance

File Maintenance Progress Reporting

File Maintenance functions will now display the file that is currently in process and if an error occurs, the screen will stay displayed allowing the user to record in which table the error occurred.