

## Medisoft v16 Features Evolution Matrix

	v12	v14	v15	v16
<b>Electronic Health Record (EHR) Integration</b>				
Basic Patient Demographic and Appointment Feed from Practice Management System to EHR			√	√
Electronic Encounter Form Feed of Transactions to Practice Management System			√	√
Customizable HL7 Interfaces with EHR			√	√
Enhanced One-way Clinical Data Flow From Practice Management System to EHR via Updated A04 and A08 Patient Message				√
-- Phone Number				√
-- Cell Phone				√
-- E-mail Address				√
-- New Insurance Carriers				√
-- New Referring Physicians				√
Appointment Status Updates Sent via Bi-directional Data Exchange				√
New Communication Manager Controls				√
-- Determine if Appointment Status Updates have been Transmitted and Received				√
-- Send Enhanced Library Resources to Medisoft Clinical, Including Provider, Facility, Procedures and Diagnosis Updates				√
New DVD Install Includes Medisoft v16 Client Server and Medisoft Clinical on One DVD (greatly reduces the number of screens that require user intervention)				√
<b>Insurance</b>				
Automatic Rebill for Claims	√	√	√	√
Insurance Groupings for Reporting and Analysis	√	√	√	√
Remittance Tracking for Secondary Claims	√	√	√	√
Integrated Electronic Eligibility Checking	√	√	√	√
Aging View in Transaction Entry	√	√	√	√
UB-04 Paper and Print Image		√	√	√
Custom Dates on ERA Posting		√	√	√
Revenue Management (integrated electronic claims solution that improves claim, eligibility and remittance processing)				√
Customizable and Flexible Grid Entries for Insurance Carriers, Providers, Your Practice and Your Data Requirements (improves claim generation)				√
Eligibility Data Entry and Processing Logic (gives greater control and the ability to manage payor IDs)				√
Ability to Define When the System Checks for Eligibility Updates (enhanced system performance)				√
Enhanced Search Filters in Payor ID Lookup Window (includes ability to add, edit and delete a record)				√
Security Assignments Same for Insurance and Eligibility (streamlines eligibility security and access)				√

## Medisoft v16 Features Evolution Matrix -- Page 2

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<b>Accounting/Billing</b>				
Customized Aging Buckets	√	√	√	√
Withhold Code Type for Procedure Codes	√	√	√	√
Serialized Superbills	√	√	√	√
Multi-link Treatment Plans	√	√	√	√
Deactivate Codes	√	√	√	√
Color-coding Transactions and Quick Ledger	√	√	√	√
Dunning Messages for Statements	√	√	√	√
Statement Management	√	√	√	√
Cycle Billing	√	√	√	√
Rules-based Collection Assignments	√	√	√	√
Actionable Collection Worklist	√	√	√	√
Task or Date-driven Collection Workflow	√	√	√	√
On-demand Collection Letters	√	√	√	√
Automatic Recalculation of Patient Remainder Balance	√	√	√	√
Automatic Small Balance Write-offs	√	√	√	√
Missed Copay Tracking	√	√	√	√
Unprocessed Transactions (Holding Tank)	√	√	√	√
Global Days (surgical billing)		√	√	√
Billing for 8 Diagnosis Codes		√	√	√
Missed Copay Remainder Statement			√	√
Small Balance Write-off by Statement Submission Count			√	√
Statement Manager Remainder Balance Display			√	√
Collection List Link to Quick Ledger			√	√
Deposit List Detail Print			√	√

## Medisoft v16 Features Evolution Matrix -- Page 3

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<b>Usability</b>				
Set Default Data Fields	√	√	√	√
Customizable Tool Bar	√	√	√	√
Option to Display Subtotals	√	√	√	√
Customized Data Screens	√	√	√	√
Warning on Duplicate Patient	√	√	√	√
Auto Tab Entry	√	√	√	√
Streamlined Transaction Entry	√	√	√	√
Field Data Checking	√	√	√	√
Patient Flagging	√	√	√	√
Show Remainder When Applying Payments	√	√	√	√
Apply to Oldest When Applying Payments	√	√	√	√
Select Multiple Claims to Print or Reprint	√	√	√	√
Enter Payments Directly from Office Hours Professional	√	√	√	√
One-clinck to Change Responsibility for Transactions	√	√	√	√
Streamlined Quick Ledger View	√	√	√	√
Rules-based Worklist for Daily Office Tasks	√	√	√	√
Copy, Edit, Add New Case Directly from Office Hours Professional	√	√	√	√
Reschedule Status in Office Hours Professional	√	√	√	√
Audit Generator with Chart Number Filtering	√	√	√	√
Patient Quick Entry		√	√	√
Multi-practice Conversion		√	√	√
Scheduled File Maintenance		√	√	√
Dashboard - Warnings		√	√	√
Dashboard - Logged-in Users Utility		√	√	√
Last Selected Chart Number Hot-key			√	√
Default Printer Option for Custom Reports			√	√
Transaction Entry Sortable Grids			√	√
Customizable Transaction Sort on Patient Statements			√	√
Edit/Enter Patient Notes from Quick Ledger			√	√
Claim Management Sorting Save			√	√
Updated User Interface Implements New Colors, Icons, Window Controls, etc., Introduced with Microsoft(R) Office 11 (enhances the user experience and improve navigation)				√
DVD Install (reduces installation time)				√
Customizable Tool Bar in Office Hours				√

## Medisoft v16 Features Evolution Matrix -- Page 4

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<b>Special Features</b>				
Office Messenger	√	√	√	√
Multimedia File Storage	√	√	√	√
Online Updates	√	√	√	√
Encoder Pro	√	√	√	√
Integrates with Microsoft Excel	√	√	√	√
Interfaces with Lab Systems	√	√	√	√
Patient Archiving	√	√	√	√
Workflow Administrator	√	√	√	√
Data Collaboration	√	√	√	√
Standard Integrated Word Processor	√	√	√	√
Standard Chart Number Change Utility	√	√	√	√
HL7 Interface	√	√	√	√
Integrated Dashboard	√	√	√	√
Data Export/Import		√	√	√
Future Appointment Warning			√	√
Phone Number Fields in Appointment Entry			√	√
<b>Reporting</b>				
Facility Report	√	√	√	√
Quick Receipt and Quick Statement	√	√	√	√
Patient Collections Reports	√	√	√	√
Insurance Collections Reports	√	√	√	√
Unapplied Copayment Report	√	√	√	√
View and Print All Future Appointments for Patients	√	√	√	√
Export to Microsoft® Excel	√	√	√	√
Standard Patient by Insurance Report	√	√	√	√
Standard Patient by Diagnosis Report	√	√	√	√
Standard Patient by Procedure Report	√	√	√	√
Case Billing Code Filter on Standard Reports	√	√	√	√
Dashboard - Totals		√	√	√
Dashboard - Trending		√	√	√
Medisoft Reports (formerly Focus Reports Standard) - Includes reports previously available in Medisoft plus more than 200 additional reports			√	√
File Maintenance Progress Reporting			√	√
Blank Appointment Indicator			√	√
Print Blank Superbills			√	√
<b>Security/HIPAA</b>				
5 Levels of Permissions and Security	√	√	√	√
Print Permissions Grid	√	√	√	√
Auto Log-off	√	√	√	√
Warning on Unapproved Codes	√	√	√	√
Unique Identifier Fields	√	√	√	√
Security Permissions on Reports	√	√	√	√
ANSI Standard Electronic Claims	√	√	√	√
HIPAA Security Ready	√	√	√	√
Rules-based Password Management	√	√	√	√
User Access History Reporting	√	√	√	√
Multi-level Trigger Management	√	√	√	√
Global Security	√	√	√	√
Security Added to MediUtils	√	√	√	√
Integrated Reporting Security				√

