

All Advantage Products
Version 12: Service Pack Enhancements
(Includes multiple Service Packs)
(Published - 4/26/2018)

Items listed on this document are the Service Pack Enhancements released with incremental updates (0.5, 0.6) between version steps (e.g. V11 to V12). They will be included in the Version Release Notes and the What's New course for the NEXT version step.

To the left of each enhancement, you will see the Service Pack identifier that it is available in (0.1, 0.2, 0.3, etc). Example: (0.5) means that the enhancement is available in version build 0.5 and GREATER. So for Version 12.0, it would be 12.0.0.5 and greater.

The current version on distribution is 12.0.0.9. If you see an enhancement with a Service Pack number GREATER than this, it means that enhancement is still in BETA, and will be available soon.

Items marked [\(Client Request\)](#) were requested by clients, and satisfied with this update.

HOT TOPICS

(0.6) Examination Command (M>Reset Portal Account for Patient) > Menu Item Moved To Patient Utility

- The option to 'Reset Portal Account for Patient' was moved to the patient demographic screen under Utility > Patient Portal > Reset.

(0.5) Ledger Commands > NEW Utility Command Added

- A NEW Utility command was added to the Ledger that will allow you to access the following Financial tables:
 - Adjustments > Description/Amounts and Notes
 - Billing Messages
 - Material Fees
 - Service Fees
- Access is controlled by the same Login Right as the Look-up Tables.

(0.6) Patient Command (Utility) > NEW 'Patient Portal' Option Added

- A NEW option for 'Patient Portal' was added.
- Command 'Patient Portal Setup w/o E-Mail' was renamed to 'Create'.
- A NEW 'Delete' command was added to allow you to delete the Portal account for the patient.
 - You will be asked to Confirm the Deletion, and then receive a Confirmation message.
 - This Event has been added to the patient Audit Report.
 - Under the 'Communication, Report or HCM' section, you will now see 'Event: Patient Portal Delete with the Date, Time, Login ID and Workstation ID.'
- The Exam > Utility command 'Reset Portal Account for Patient' was moved to this location and renamed to 'Reset'.

Appointment Enhancements

(0.5) Command (Date) > Close Calendar After Selecting Date

- Click the down arrow at the Date field and a calendar opens. When you double click on the date that you want, the calendar will now automatically close. (Client Request)

(0.5) Command (Print>Selected Resource) > Home & Cell Phone Removed

- Click Print > Selected Resource and choose Alphabetically; the Home Phone and Cell Phone were removed from the Comments section and will only print in the Remarks section. (Client Request)

(0.5) Command (Tools) > NEW Option 'Configuration' Added

- Under the Tools command, a NEW option called 'Configuration' was added to allow the user to control more items in the scheduler.
- Currently there is one NEW Configuration setting, but more will be available in the future.
- PopupMenus Configuration
 - The 'Close On Go To' will allow you to control if the scheduler closes completely, or minimizes and stays open when you right click on an Appointment and select 'Goto Patient'. (Client Request)
 - Select 'Yes' to close the scheduler, and 'No' to minimize it.

Examination Enhancements

(0.5) Command (Utility) > E-Rx > History View/Merge

- When merging the patient's Medication History, the 'Start' date will now default to the Start date on the Medication, and not the current date. (Client Request)

(0.6) Command (Utility>Health Care Maintenance>Communication) > Command Hidden

- The 'Communication' command has been hidden, as it is still in development.

(0.5) Command (Worklist) > Enhancement Made to Existing Compulink-Owned Worklist

- ERX Errors
 - A NEW 'Delete' command was added to the Worklist window. (Client Request)
 - This will allow the user to Delete a patient from the list.
 - This feature will only work on errors that are NOT accessible or fixable to the user.
 - Example: Refills or anything else that is part of the RXMESSAGE.
 - For errors that ARE fixable, such as one related to the specific exam medication, the feature will NOT work, and the error must be corrected in the software.

(0.8) Encounter Favorites > Multiple Lines Retain Formatting

- Fields with type of 'Varchar' and 'Memo' that contain multiple lines will now retain their formatting and not post in a single line of text.
- Example:
 - In a memo field, type a line of information, hit enter to the next line and type additional information.
 - Save your Encounter Favorite.
 - Pull the Encounter Favorite onto a clear tab, and it will enter 2 lines of information, and not string both lines into one long line.

Function Enhancements

(0.8) Insurance Activities > Batch Eligibility > Multiple Enhancements

- The Destination will now default to 'Change Health'.
- The speed at which the function runs has been increased.
 - In order to increase the speed, the patient names will no longer scroll in the window, and the size of the window itself has been shortened.
- The function will pull both Primary and Secondary Eligibility, however, the report will only display the Primary benefit highlights.
 - The Secondary information will be pulled into the patient's Insurance record.

(0.6) Lock Box Payment Import > Add ID and Time Included

- The 'Add ID' of the user that ran the function and 'Time' posted will now display on the payment in the ledger. (Client Request)

Patient Area Enhancements

(0.6) Command (Print>Send E-Mail to Patient) > Successful Message

- When sending an E-Mail to the patient, you will now receive the message: E-Mail has successfully been sent! (Client Request)

(0.6) Command (Utility>Patient Portal>Reset) > Added to Audit Trail

- When a user clicks on Utility > Patient Portal > Reset, this will now be written to the patient Audit Trail. (Client Request)
- From the demographics, click on Print> Audit Report.
- Under the 'Communication, Report or HCM' section, you will now see 'Event: Patient Portal Reset' with the Date, Time, Login ID and Workstation ID.

(0.6) Command (Worklist) > NEW Routine For 'ERX Errors' Worklist

- A NEW routine was created that will update the items that remain on the 'ERX Errors' Worklist, and set their status to Canceled. (Client Request)
- See the section under 'Utility > System Administrator > Utility SQL Scripts' for details.

(0.5) Tabs > Enhancement Made to Existing Compulink-Owned Tab

- The following is for ALL Advantage products:
- PopUpContacts
 - Patient Contacts panel – The type ahead feature was added to the 'Last Name' field. (Client Request)
 - Type a few characters into the field and then click the drop-down to open the table.
 - Only items in the table that start with those characters will display for selection.

Report Enhancements

(0.8) Administrative > Enhancements Made to Existing Reports

- Time Clock Analysis and Time Clock by Week
 - The 'Employee ID' Parameter now has a drop-down that accesses the Login IDs table. (Client Request)

(0.6) Appointment> Daily > Enhancements Made to Existing Report

- Missing Charges

Report Enhancements

- The report was updated to pull from the databases directly, and no longer run on pre-processed data. (Client Request)
 - This will speed up the running of the report, and also makes it accessible to run through the PracticeWatch utility.
- Part of the report definitions were moved to the last page. (Client Request)

(0.9) Electronic Health Record > Enhancement Made to Existing Report

- ACI Full Set Patient List 2017
 - If running the report for Groups, the 'Latest Exam' date will no longer display for patient level measures; it will ONLY display for exam level measures. (Client Request)
 - This change was made to clear up confusion on whether or not a related exam was found.

(0.5) Electronic Health Record > New Report: ACI Transitional Simple List 2017

- This report presents a quick way for MIPS eligible clinicians to produce attestation data for the 2017 Transitional Advancing Care Information Measures. (Client Request)
- Total Numerator, Denominator and any Denominator Exclusions are reported for each Measure.
- This simple list prints on two pages, making it convenient for the clinician to input their ACI totals on the QPP Submission Portal.
- Use the companion report 'ACI Transitional Patient List 2017' to review patients associated with any ACI Measure with a Denominator greater than '0'.
- Easily identify who qualified for the Measure and who did not, based on the CMS specifications and your documentation.
- First generate reporting data for the clinician.
 - Set the Provider record: MU (ACI) Year=2015 and MU (ACI) Stage=2
 - Run the Dashboard to populate the report data; be sure to use the same Year and Stage options.
 - This creates a data set for the report.
- Options/Parameters for running the report include the following:
 - Location Group – This is based on the EHR Location associated with the medical records being evaluated.
 - Provider ID – Identify the Eligible Clinician you specified in the Dashboard to populate data for the reporting period.
 - Reporting Period Begins on/after and Ends on/before dates – Use dates equal to or earlier/later than the date used to populate report data.
 - Populate Data Threshold – Use data that was generated by the Populate Report Data utility in the MU Dashboard from this date forward.
 - Threshold Hour Start/End – Use data generated with the Populate Report data utility from/through this Hour (military time).
 - Show Measure Description? - Option to include the CMS description in the individual ACI Measure detail.
- Select your Options and click Begin.
- The report is organized by Location Group, Provider, then by data set.
 - Summaries per Data Set:
 - Title, Numerator, Denominator and Exclusions.
 - Display for each ACI Measure:
 - Measure ID, Measure Name and Objective Name.
 - Optionally you can see the description and a subtotal row for the Numerator and Denominator.
 - Alert displays for base Measure of 0%.

(0.5) Financial > Acct Management > Enhancements Made to Existing Reports

Report Enhancements

- Accounts Receivable
 - This report was renamed FROM 'Accounts Receivable All'.
 - The report was updated to pull from the databases directly, and no longer run on pre-processed data. (Client Request)
 - This will speed up the running of the report, and also makes it accessible to run through the PracticeWatch utility.
 - The Parameter/Option 'Minimum Days Old' was updated so it no longer maxes out at 180-200 days. Example: you may now enter 365 days. (Client Request)
 - The NEW Parameters/Options 'Minimum/Maximum Account Balance' were added. (Client Request)
 - Note: If 'Maximum Account Balance' is set to \$0, and 'Responsible Only View' is set to True, the report will only show accounts with a Responsible Balance of a Credit Balance.
- Accounts Receivable, Accts Receivable by Service Loc, --BETA A-R by Account and -BETA A-R Responsible
 - All of the specified A/R reports were updated to include Totals and Percentages for each aging group. (Client Request)

(0.6) Financial > Acct Management > Enhancements Made to Existing Reports

- A-R SNAPSHOT
 - The Parameter/Option for 'Location' was replaced with 'Location Group'.
 - The NEW Parameters/Options 'Minimum/Maximum A-R Balance' were added. (Client Request)
 - Note: If 'Maximum A-R Balance' is set to \$0, the report will only show accounts with a Credit Balance.
 - This report is a quick review of account balances on any given date, with optional account contact information; it does NOT display aging.
 - The report also runs faster than the full Accounts Receivable report, so the user can get fast credit balance review, or fast review of any targeted balance range.

(0.8) Financial > Acct Management > New Report: Ins. Rec. by Svc Location by Payor

- This report is similar to the 'Ins. Receivables by Payor' report, however, when run with the Parameter of 'LOCATION GROUP (Svc Loc) = '*', the data is organized by Service Location. (Client Request)
- It offers the same Parameters/Options for running, and generates the same information as the standard 'Ins. Receivables by Payor' report.
- Additional information includes the following:
 - Subtotals by Service Location.
 - Each Service Location starts a new page, so you are able to distribute them if needed.
 - The chart for "Aged Pending by Payor" now includes a Location breakdown.
 - Itemized information is grouped by Location with 'Location Totals'.

(0.5) Financial > Analysis > Enhancements Made to Existing Reports

- Office Production and Office Production w Inline Adjust
 - When running these reports with the Parameter/Option 'HIDE Detail?' set to False, the Modifiers will now be included in the data. (Client Request)

(0.5) Financial > Analysis > New Report: Non LIP Office Production

- This report was created for clients that do not have LIP (Line Item Posting) of payments. (Client Request)

Report Enhancements

- It offers the same Parameters/Options for running, and generates the same information as the standard 'Office Production' report (for clients running LIP).
- The calculations used to generate the information have been created specifically for Non-LIP.

(0.9) Financial > Daily > Enhancements Made to Existing Reports

- Payment
 - A 'DEPOSIT SLIP' header was added to the top of the additional page for that option. (Client Request)
 - Deposit totals were added for '# Items' and amount. (Client Request)

(0.5) Financial > Daily > Enhancements Made to Existing Reports

- Daysheet
 - A NEW 'REFUND' column was added.
- Payment
 - A NEW 'REFUND' column was added.
 - The columns in the 'Payment Summary by Posting ID' were decreased in order to view more information on one page. (Client Request)
 - The section on 'More Information about the Payment Report' was moved to the last page of the report. (Client Request)

(0.5) Financial > Daily > New Report: Daysheet Non LIP

- This report was created for clients that do not have LIP (Line Item Posting) of payments. (Client Request)
- It offers the same Parameters/Options for running, and generates the same information as the standard 'Daysheet' (for clients running LIP).
- The calculations used to generate the information have been created specifically for Non-LIP.

(0.5) Financial > Daily > New Report: Payment Non LIP

- This report was created for clients that do not have LIP (Line Item Posting) of payments. (Client Request)
- It offers the same Parameters/Options for running, and generates the same information as the standard 'Payment' report (for clients running LIP).
- The calculations used to generate the information have been created specifically for Non-LIP.

Utility Enhancements

(0.6) Diagnostics > New Checks On Web Registration Added

- The following items were added to the Web Registration check when running a Complete Diagnostics:
 - If the first and last name fields are empty, the record will be removed and no longer display in the import screen.
 - If a record has not been imported after 30 days, it will be removed and no longer display in the import screen.

(0.5) PracticeWatch Setup > Lightweight vs. Heavy Processing Times

- The function has been updated to only run 'Heavy Processing' items outside of your specific Business Hours.
- Only 'Lightweight' processing items will run from 30 minutes before the first appointment scheduled for the day, until 1 hour after the last appointment scheduled.
- It will also only run 'Heavy Processing' items outside of the time designated for your backup.

Utility Enhancements

(0.6) System Administrator > Utility SQL Scripts > NEW Routine For AdvantageERx

- The NEW routine 'ERX: Cancel All Remaining "Needs Attention" Items' was added.
- This will update the items that remain on the 'ERX Errors' Worklist, and set their status to Canceled. (Client Request)

(0.6) System Administrator > Utility SQL Scripts > NEW Routine For Healthcare Maintenance Rules

- The NEW routine 'HCM Rule Optimization' was added.
- This will update the items that remain on the 'ERX Errors' Worklist, and set their status to Canceled. (Client Request)
- It will also add an End Date and mark User-owned Rules hidden that have not been modified for or over 3 years.
 - Once the routine is run, the user should review the Rules with End Dates and confirm if they should stay hidden, or they would like to continue using them.
 - If you need to continue using them, edit the Rule and remove the End Date and change the Hide to N.
- This will improve the speed at sign-off of the exam record.