

## Psych Advantage Version 11.0.5.5 Changes

### General changes:

1. Hotkeys.
  - The hotkey for GL/AP on the main screen is now "A".
  - The hotkey for Logoff is now "G" across all screens.
2. New Login Right "Receive Incoming Faxes".
  - This right controls if a User is allowed to see faxes that have been imported into the software.
  - It defaults to FULL for "Checkin" and "Checkout" Profiles upon update of the software.
3. Practice Watch.
  - From the main screen go to UTILITY > PRACTICE WATCH.
  - Practice Watch is a task management dashboard that is integrated with Advantage Software versions 11.0.5.4 and greater.
  - This feature is scheduled for beta release with Version 11.0.5.5.
  - Beta clients will be configured with a special service that is required for scheduled tasks to run unattended.
  - Other users can setup tasks, configure distribution groups, etc., but will need to wait until Practice Watch is in general release for scheduled tasks to run.
  - Clients running earlier Versions of the Advantage software may experience errors with scheduled tasks.
  - See the section "Main Menu: Utility > Practice Watch" in the Help Manual for detailed information on this feature.

### Report changes:

1. REPORT > FINANCIAL > ANALYSIS > CHARGE COLLECTION ANALYSIS.
  - The % of Net Charges paid by insurance, responsible, and total paid were added to the end of the report.
2. REPORT > FINANCIAL > ANALYSIS > ~BETA Production by Primary Payor.
  - This Beta report is a variation of the Office Production report, based upon the primary Insurance Payor attached to the original charge.
  - Please email feedback to [betareportfeedback@compulinkadvantage.com](mailto:betareportfeedback@compulinkadvantage.com).
3. Psych Advantage Only: REPORT > FINANCIAL > ACCT MANAGEMENT > PQR COMPLIANCE 2015 REPORT.
  - The following new codes were added to the PQR Compliance Report.
    - Measure #46 Med Reconciliation-After D/C from Inpatient Facility (two sections run for the two groups: age 18-64, age 65 & older)
    - Measure #47 – Advanced Care Plan.
    - Measure #128 – BMI Screening / Follow-Up.
    - Measure #130 – Documentation of Current Medications.
    - Measure #131 – Pain Assessment and Follow-Up.
    - Measure #134 – Screen Clinical Depression.
    - Measure #181 – Elder Maltreatment Screen / Follow-Up.
    - Measure #226 – Tobacco Use Screening / Cessation Counseling.
    - Measure #317 – HBP screening.

### Table changes:

1. GENERAL > LOCATION > DETAILS table.
  - You now have the option of sending and receiving electronic faxes from specific areas of the software using Updodx.
  - The security level is the same as if you were sending a standard fax; and there is no additional fee.
  - A "Fax Setup" menu option was added so users can register a new Fax # with Updodx for the new web faxing capability.

- Highlight the Location and click "Fax Setup."
  - You will be presented with the prompt: "Press YES to continue in setting up new Fax # using Updcox!"
  - This will update the "Cloud Fax" field on the highlighted Location.
  - This field may not be edited manually.
2. GENERAL > REFERRAL > SOURCES table.
- An "Alpha Sort" menu option was added to allow users to sort the table by name.
  - The following prompt appears: "Select YES to confirm alphabetic Sorting of all entries!"
  - Once you select Yes, it assigns the Display Order in increments of 20 in Name Order, so users can easily move a few of their high volume Referrals to the top if needed.
3. GENERAL > TODO/FOLLOWUP > ITEMS table.
- A Display Order field was added to the table.
  - Select your Display Order, or leave as 999999 for the natural order.

### **Electronic Billing (EDI) changes:**

1. Claim Edit changes.
- Get the latest information on your Advantage Claim Edits.
  - Download our Advantage Claim Edits Guide now: <http://client.compulinkadvantage.com/wp-content/uploads/Advantage-Claim-Edits-7-9-15.pdf>
  - In this guide, you will find everything you need to know about the latest Claim Edit Set, including:
    - How to confirm you have the latest Claim Edit Set.
    - How to update to the latest Claim Edit Set.
    - What's new; review before updating if you like.
    - Full listing of claim edits.
    - Several valuable cross-references.
    - Useful additional information.
  - This document will be updated as every new Claim Edit Set is released and posted on this page: <http://client.compulinkadvantage.com/payor-claim-edit/>

### **Patient Demographic changes:**

1. Merging patients.
- Click on EDIT, select MERGE and you will be presented with the following prompt: "Enter Current Date to Confirm MERGE Operation"
  - This is to insure that the merging of two patient accounts is not done by mistake.
  - Once the second patient is selected to Merge, you will be presented with another warning: "Press OK to Confirm merging Patient: XYZ into Patient: ABC. There is NO UNDO Option so BE VERY VERY SURE!!"
2. Adding Insurance via Web Registration.
- If an exact match for the Insurance Payor being imported is not found, a window will open to allow you to select a Payor from the table.
  - The table will open to display ONLY Payors that have a partial match to what the patient entered.
  - If you do not select a Payor, you will be presented with the following prompt:
    - "Select Yes to Save Record without Insurance Co. or NO to try again w/o patient supplied carrier name!
  - If you select NO, it will re-open the Payor table and display ALL Payors.
3. Inbox/Communication screen.
- The new Edit command allows Users to modify the Subject line for better usability/communication.
  - A new "Download>Faxes" command was added.
    - This will allow any User to manually download faxes from Updcox that may be waiting.
    - It will also do a screen refresh to reveal any new faxes that were downloaded.
  - Assign Communication to patient.
    - Once you have Viewed the Communication record, you can Assign it to a patient record.

- Click "Assign" and the patient database window will open for you to search for and select the patient.
  - Once assigned to the patient, the Communication record can then be imported into the scanned documents, or the exam if needed.
  - Patient name column was added to display the patient that the Communication record was assigned to.
4. Patient Tracking.
    - There is now a new Enhanced Patient Tracking module.
    - See the section "Patient Tracking – Enhanced Tracking" in the Help Manual for detailed information on this updated feature.
  5. Work List for patient Statements.
    - A new Work List called "Patient Statements Due" can be viewed in the patient demographic area, prior to running the patient Statements.
    - Information includes Account #, Last Name, First Name, Total Ledger Balance, Responsible Balance, and Insurance Balance.

#### **Ledger change:**

1. If a patient is flagged for being on Collection, and the balance becomes zero (or a credit), the Collection flag will automatically be reset, and the Collection record marked as closed.

#### **Exam changes (General):**

1. Updating the Default/Normal value on the fly.
  - You can now update the Default/Normal value on an individual field from the exam screen.
  - Right click in the field and select "Update Default/Normal Value".
  - Enter the new Default value and click OK.
  - Right click in the field again and select "Assign Normal"; your new value should appear.
  - Other staff will not see this new value until they have exited and relaunched the software.
2. Printing options
  - Print > Letter.
    - The following Open Office (ODT) documents were created for printing Lab information from the exam.
      - ExamLabAllOrders and ExamLabAllOrdersSign – Prints ALL Tests ordered.
      - ExamLabOnlyOrders and ExamLabOnlyOrdersSign – Prints only Laboratory Test orders; no Radiology or Imaging.
  - Print > "Send Letter to Portal" was changed to "Letter to Portal".
  - Added Print -> "Letter to Referral via Direct".
    - This supports sending any letter via direct to a Referral with a Direct E-mail attached to the active patient.
  - Added Print -> "Letter to Referral via Fax"
    - This will use your Cloud/Updiox Fax number to send the outgoing fax to the Referral.
    - This feature is considered a convenience, and is NOT to be used for sending CCD documents for Meaningful Use.
  - Print > CCD Document.
    - The "Performer" will not print on the document unless it has been signed off on by a Provider.
    - If more than one Provider has signed off, the "Performer" will be listed as the LAST Provider to sign off on the exam.
3. Exporting an Image file.
  - Right click on an image and select "Export to File."
  - The File name used to default to "ExportImage", and now defaults to blank.
  - Type your preferred name into the field and Save.

4. Importing a Communication record into Exam Image.

- Communication records found in the InBox can be assigned to a patient, and then imported into the exam record.
- This will help streamline the electronic movement of PHI information.
- Once imported, the Communication record will be removed from the InBox
- When adding an Image record, right click in the field and select "In-Box Import."

**Exam changes (Tabs):**

1. Orders tab.

- Click the green + to add a record and the Category will now default to "General."
- Click the down arrow at the Description field, and the list is filtered to display Orders only; it does not include Goal Objectives.

2. Plan tab.

- The Next Appt grid will now display the Notes field so the Provider can view information entered on previous visits.

## Client Requests that were Satisfied with this Version

1. Run a list of patients that are eligible for a Statement, but do NOT mark them as billed. Would like to view the total account balance; and divided up to show how much of that is Patient balance and expected from Insurance.

NEW FEATURE: Work List for patient Statements.

- A new Work List called "Patient Statements Due" can be viewed in the patient demographic area, prior to running the patient Statements.
- Information includes Account #, Last Name, First Name, Total Ledger Balance, Responsible Balance, and Insurance Balance.

2. Ability to alpha sort the Referral Sources table. Ability to insert records.

NEW FEATURE: GENERAL > REFERRAL > SOURCES table.

- An "Alpha Sort" menu option was added to allow users to sort the table by name.
- The following prompt appears: "Select YES to confirm alphabetic Sorting of all entries!"
- Once you select Yes, it assigns the Display Order in increments of 20 in Name Order, so users can easily move a few of their high volume Referrals to the top if needed.

3. Option to undo the merging of two patient accounts, or have an additional confirmation when attempting the merge.

NEW FEATURE: Merging patients.

- Click on EDIT, select MERGE and you will be presented with the following prompt: "Enter Current Date to Confirm MERGE Operation"
- This is to insure that the merging of two patient accounts is not done by mistake.
- Once the second patient is selected to Merge, you will be presented with another warning: "Press OK to Confirm merging Patient: XYZ into Patient: ABC. There is NO UNDO Option so BE VERY VERY SURE!!"

4. Speed up the batching of electronic claims.

NEW FEATURE: Some claim edits were rewritten to increase the processing speed.

5. Font size on Alert messages was increased and made bold in a recent update. Would like the font size to be smaller so they don't have to scroll.

NEW FEATURE: Font size was reduced on the Alert messages.

6. Create Open Office documents to print Lab information in the exam.

NEW FEATURE: The following Open Office (ODT) documents were created for printing Lab information from the exam.

- ExamLabAllOrders and ExamLabAllOrdersSign – Prints ALL Tests ordered.
- ExamLabOnlyOrders and ExamLabOnlyOrdersSign – Prints only Laboratory Test orders; no Radiology or Imaging.

7. Exam Objective tab - Do not show items with a Category of "Objectives" in the dropdown.

NEW FEATURE: Orders tab.

- Click the green + to add a record and the Category will now default to "General."
- Click the down arrow at the Description field, and the list is filtered to display Orders only; it does not include Goal Objectives.

8. Ability to order the Todo/Followup Items table.

NEW FEATURE: Todo/Followup Items table.

- A Display Order field was added to the table.
- Select your Display Order, or leave as 999999 for the natural order.