Version 11.0.6.0 Changes

**Report changes:**
1. Report > Appointment > Analysis > Statistics.
   - You now have the option to run the report by the Appointment Reason.
   - Type in the Reason, or use a wildcard like Exam* to pull all appointments that start with Exam, like Exam NP and Exam EP.
   - Only appointments with the Reason field matching the Appt Reason option will show up on the report.
2. Report > Financial >Acct Management > Ins Receivables by Carrier.
   - The Patient name will now be included in the detail, along with the Account Responsible name.
3. Report > Financial >Acct Management > PRE-Billing Claims Review.
   - The diagnostic code fields were increased to be able to display ICD-10 Codes.
   - Displays the Secondary claim if the Primary claim has a paid date, and the Secondary Payor balance is greater than zero.
   - Displays the Tertiary claim if the Primary and Secondary claims have a paid date, and the Tertiary Payor balance is greater than zero.

**Utility changes:**
1. Utility > Customize Screen/Table Structure/Rules > Smart Function Editor > Exam.
   - A new parameter was created for the "SelectEncounterFavorite" Smart Function.
   - Previous versions allow for the ('%keyword') to bring up all Encounter Favorites that had the specified keyword in the name; this would bring up right, left, and bilateral.
   - You can now specify laterality in the parameter to only bring up Encounter Favorites with the specified keyword AND the specified laterality.
   - It will look for R, L, or B in the name of the Encounter Favorite.
   - Example: ('%sample','R') would specify to only bring up Encounter Favorites with the word "sample" and the "R" for right in the name.

**Table changes:**
1. Utility > Look-up Tables > Financial > Services.
   - In previous versions, the Crystal Report generated from the Print command would only display a list of the Service Descriptions.
   - The new Detailed Crystal Report displays in Post Code order, and includes the Description, as well as the detailed information you see on each individual fee column.
   - This same information was also added to the Crystal Report for the Materials table.
2. Utility > Look-up Tables > EHR > Assessment/Plan > By Diagnosis.
   - When creating wildcard entries that should appear for multiple diagnoses, you no longer need to add the % sign.
   - In previous versions, you would have 365%, and this would display for any diagnosis that you added to the patient record that started with 365.
   - In the new version, you would just enter 365 (no % needed).
   - This works the same for the Diagnosis/Orderset Mapping table.
3. Utility > Look-up Tables > EHR > Diagnosis > Name.
   - More "Unspecified" ICD-10 Codes are now available to you.
   - These will automatically be unhidden in the table upon update to version 11.0.6.0.
4. Utility > Look-up Tables (most of the major tables).
   - A Filter command is now available.
   - Choose to display "Hidden" records only, "UnHidden" records only, or "Off" to display ALL records.

**Patient changes:**
1. Patient search via Email address.
   - On the patient demographic screen, click on Search and select SQL Options.
   - Double click on Patient Email.

Compulink Business Systems, Inc | 1100 Business Center Circle | Thousand Oaks, CA 91320 | 800.888.8075
support@compulinkadvantage.com | www.compulinkadvantage.com

1

- Enter the full Email address, or a partial address and click OK or hit Enter.
- A Select Patient window opens with all patients with an Email address that matches what you entered.
2. Worklist.
   - Previous versions contained a Worklist that would display ALL patients accessed on the current day.
   - A new Worklist was created to only show patients accessed on the current day by the person that is currently logged into the system.
   - The names of the Worklists are; "Patients Accessed Today All ID's" and "Patients Accessed Today Login ID".

**Exam changes:**
1. Refraction Smart Functions.
   - The Smart Functions that are attached to the 1 Year and 2 Year buttons will assign the appropriate diagnosis, and include the indication for laterality (OD, OS, or OU).
   - The Smart Function attached to the Type field will also assign the diagnosis and laterality, upon exit of the field.
2. Assessments and Plans.
   - When you add a diagnosis and double click in the Assessment or Plans fields, it will no longer display the ICD codes next to the options.
   - In previous versions, if the same Assessment or Plan was attached to multiple codes, it would display multiple times in the list.  It will now only display one time.
3. Encounter Favorites.
   - New prompt for laterality.
      - If the name of the Encounter Favorite contains "R", "RT", "Right", "L", "LT", "Left", "OD", "OS", "OU", or "Bilateral", this feature will NOT run.
      - In the Encounter Favorites table, there is a field for "Default Values."  In the first field, if the last characters are "_R", and there is a corresponding "_L" field somewhere in the database, and the name of the Favorite does NOT contain one of the words listed above, it will prompt you to select Right, Left or Bilateral when selecting the Favorite.
      - Instead of creating 2 or 3 Encounter Favorites to cover laterality, you can now create just one, and the software will prompt for the laterality.
      - Example: Create a Favorite for the Right side, and put in default values for all of the fields that you would like for the Right side.  Name the Favorite with a generic name (Conjunctivitis Conj), not specifying laterality.  Instead of "Conjunctivitis OD", "Conjunctivitis OS", and "Conjunctivitis OU", there would just be "Conjunctivitis" with the default fields filled in for just the Right side.  When you select the Encounter Favorite of "Conjunctivitis Conj", it will prompt for you to select the laterality.
      - If working in ICD-10 mode, it will only bring up the diagnoses for the selected laterality.
4. Smart Functions for adding diagnoses in ICD-10 mode.
   - Converting from ICD-9 to ICD-10.
      - If you are using a Smart Function to add an ICD-9 Code to the Plan tab, the software will find the corresponding ICD-10 Code(s) for you.
      - If there is only one ICD-10 Code available, then it will automatically add it to the Plan tab for you.
      - If there are multiple ICD-10 Codes, then a window will open for you to select the one that you would like to add.
      - If the eye was specified in the Smart Function, only the ICD-10 Codes for that eye will display for you to select from.
   - Adding the same diagnosis for both eyes.
      - If the patient's ExamDiag database already has a diagnosis listed for one eye, and you use a Smart Function to trigger the addition of the SAME diagnosis for the other eye, it will edit the original entry and mark it as OU.
      - The ExamDiag database will NOT display 2 records (one for OD and one for OS), it will have one record with OU.
5. Open Office documents.
   - Three new Open Office documents were added.
      - PedsCISS.

- PedsCISSSign.
- PedsHistoryQuestionnaire.
  - One existing document was updated.
    - ExamCompleteAll – Added the ExamOrder Internal instructions and Patient Instructions.

**ICD-10 Bridge:**
1. The ICD-10 Bridge will convert the ICD-9 codes to ICD-10 codes in 4 of the Advantage EHR tables.
2. This will automatically run on October 1$^{st}$, if you are currently running version 11.0.6.0.
   - You may update to version 11.0.6.0 now, but the bridge will not run until October 1$^{st}$.
   - If you are NOT on version 11.0.6.0 on October 1$^{st}$, the bridge will NOT run until after you have updated.
   - The bridge will NOT run prior to October 1$^{st}$, so you may enter any ICD-9 Codes that you wish, and they will all be updated at one time; it will NOT run more than one time.
3. The first person to log into the software for the day will receive an update message.
   - When the update starts, it will bring up a normal update window that says it is converting your ICD-9 items to the ICD-10 version.
   - Once the update is complete, the software will open up like normal.
4. The Compulink owned items in the tables will already contain the ICD-10 information, so the bridge will only run on the User owned items.
5. Once the bridge is run, you may go into your tables and make changes as usual.
6. Tables will be converted from ICD-9 to ICD-10 using an enhanced version of the government recommended GEMS:
   - Encounter Favorites and Image > Bitmap Detail tables.
     - These tables both contain an ICD-9 Code(s) and an ICD-10 Code(s) field.
     - The bridge will look at the codes in the ICD-9 Code(s) field, and then go to the mapping table and find the ICD-10 Codes that are equivalent to them.
     - These ICD-10 Codes will be dropped into the ICD-10 Code(s) field in both the Encounter Favorites and Image > Bitmap Detail tables.
     - If you have already manually added ICD-10 codes to some of the entries in these tables, the bridge will skip those entries.
   - Assessment/Plan > By Diagnosis table.
     - The bridge will look at the ICD-9 Codes that you have in the table, and add the equivalent ICD-10 Codes.
     - If the ICD-9 Codes are hidden, it will still add the ICD-10, and it will be marked hidden as well.
   - Utility > Health Care Maintenance Rules/Orders > Diagnosis/Orderset Mapping table.
     - The bridge will work the same as in the Assessment/Plan > By Diagnosis table.
     - Equivalent ICD-10 Codes will be added for each of the ICD-9 Codes in your table.
6. Combining of Codes.
   - When the bridge runs, it will also combine codes when possible, so there are not thousands of items in the table.
   - As an example, in the Assessment/Plan By Diagnosis table, you will find the code H00.1 Chalazion.
   - There are a total of 7 codes that describe the laterality (right or left), and the location on the eyelid.
   - The Assessment/Plan will most likely be the same for all 7 codes, so they are combined to display in the single entry of H00.1, and the attached Assessments and Plans will display for all codes when posting to the patient exam.

## Client Requests that were Satisfied with this Version

1. Ability to filter out "Hidden" entries in the tables.
   - NEW FEATURE: Utility > Look-up Tables (most of the major tables).
     - A Filter command is now available.
     - Choose to show "Hidden" records only, "UnHidden" records only, or "Off" to show ALL records.
2. Better Print options in the following tables: Services and Materials.
   - NEW FEATURE: Utility > Look-up Tables > Financial > Services.
     - In previous versions, the Crystal Report generated from the Print command would only display a list of the Service Descriptions.
     - The new detailed Crystal Report displays in Post Code order, and includes the Description, as well as the detailed information you see on each individual fee column.
     - This same information was also added to the Crystal Report for the Materials table.
3. Added "Total Count" of unsigned EHR records back to the Provider Dash.
4. Add Patient name to the Insurance Receivables by Carrier report.
   - NEW FEATURE: Report > Financial >Acct Management > Ins Receivables by Carrier.
     - The Patient name will now be included in the detail, along with the Account Responsible name.
5. New Worklist that shows the patients accessed today only by the person logged into the software.
   - NEW FEATURE: Worklist.
     - Previous versions contained a Worklist that would display ALL patients accessed on the current day.
     - A new Worklist was created to only show patients accessed on the current day by the person that is currently logged into the system.
     - The names of the Worklists are; "Patients Accessed today All ID's" and "Patients Accessed Today Login ID".
6. AutoComplete in the exam area only works when you type a capital letter; change to work for either capital or lower case.
   - NEW FEATURE: AutoComplete now works with lower case.
     - Go to a field with a dropdown in the exam and type either an upper case or lower case letter, and it will AutoComplete with an entry from the table.
7. Mapping of ICD-9 Code 918.1 to ICD-10 now includes initial and subsequent visit codes.