compulink
Your EHR/PM Business Partner

Version 11.0.6.3 Changes (12/29/2015)

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- You'll need the Username and Password associated with your student account to log in.
- Ask your manager or Compulink Administrator if you don't have this information.

Go to the last page for links to enhancements from previous versions.

General changes:
1. New message for PracticeWatch.
   - Users will receive a weekly reminder about the brand new PracticeWatch feature, if there are no PracticeWatch tasks scheduled for the next 60 days.
   - This can be used to schedule Emails, Instant Messages, Reports, Text Messages and Todos.
   - This feature uses your Login IDs table to deliver Messages and Reports to individuals in your practice. Be sure the entries in this table are accurate and up to date.
   - Please review the PracticeWatch documentation in the on-line Help Manual for further details.

Report changes:
1. Report > Marketing >Analysis > ~BETA Patient Demographics with Options.
   - This Beta report shows patient demographics with option detail.
   - Charts and summaries will show you totals by Plan, zip code, age and gender.
   - Please email feedback to betareportfeedback@compulinkadvantage.com.

Data Mining changes:
1. A new Global option was added called 'Patients with appointments tomorrow'.
   - This will search for all patients that have an appointment scheduled tomorrow, and display the following information: Last, First, Time, Provider and Plan.

Table changes (Groupings and Filters):
1. Utility > Look-up Tables > General > Facilities.
   - This table was renamed from 'Other Provider Facilities' to just 'Facilities'.
   - A Location Groups filter was added.
     - The Location > Groups table is used to Group Locations together to be used for filtering items throughout the Advantage software.
     - Use the Detail > Add/Delete command to attach specific Location Groups to a Facility.
     - When accessing the Facilities table at the Ledger, you will only be able to see the Facilities that were assigned to the Location Group that your Location is attached to (the Location you are currently logged in under).
     - If no Location Group is assigned to an entry in the table, it will be open for ALL who are logged into the software.
     - NOTE: If you assign a filter, the staff will only be able to see the Facility if they are logged in under a Location that is part of the Location Group filter.
   - A Location Groups command was added.
     - With the addition of the Location Groups filter, a command was added to the menu so you can quickly access the Location > Groups table.

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- This will allow you to view the Groups that were already established, and to Add/Edit/Delete in the table as well.
- You must have Login Access Rights already established to access the Location > Groups table.

2. Utility > Look-up Tables > General > Provider.
   - A Location Groups filter was added.
     - The same filter that was discussed in the Facilities table was also added to this table.
     - Use the Detail > Add/Delete command to attach specific Location Groups to a Provider.
     - This will filter the Provider list when accessing it from the patient record.
   - The Location Groups command was also added for quick access to the Location > Groups table.

3. Utility > Look-up Tables > General > Referral > Sources.
   - A Location Groups filter was added.
     - The same filter that was discussed in the Facilities table was also added to this table.
     - Use the Detail > Add/Delete command to attach specific Location Groups to a Referral Source.
     - This will filter the Referral Source list when accessing it from the patient record.
   - The Location Groups command was also added for quick access to the Location > Groups table.

4. Utility > Look-up Tables > General > Staff > Groups.
   - This new table is similar to the Location > Groups table, and can be used to create Groups of staff for filtering.
   - You can also access this table from the Exam > Utility menu.
   - Staff Groups are created with one or multiple Users from the Login IDs table.
   - First create a Group Name.
   - Use the Detail command to Add/Delete staff names to the Group.
   - The same User can be added to more than one Staff Group.
   - Examples:
     - 'ASC' Group for all staff associated with an ASC.
     - 'Provider' Group for all Providers in the office (does not include techs or other staff).
     - 'Location 001' Group for all staff at Location 001.
   - Watch for expanded use of Staff Groups filtering in Reports and Functions in future releases of Advantage.

5. Utility > Look-up Tables > Financial > Payors > Names.
   - A Location Groups filter was added.
     - The same filter that was discussed in the Facilities table was also added to this table.
     - Use the Detail > Switch command to change the bottom of the screen to 'Location Group Name'.
     - Then use the Detail > Add/Delete command to attach specific Location Groups to a Payor.
     - This will filter the Payor list when accessing it from the patient record.

6. Utility > Look-up Tables > EHR > Medication > Pharmacy.
   - A Location Groups filter was added.
     - The same filter that was discussed in the Facilities table was also added to this table.
     - Use the Detail > Add/Delete command to attach specific Location Groups to a Pharmacy.
     - This will filter the Pharmacy list when accessing it from the patient exam record.
   - The Location Groups command was also added for quick access to the Location > Groups table.

7. Utility > Look-up Tables > EHR > Encounter Favorites.
   - Assigning Encounter Favorites to multiple tabs.
     - Highlight the Favorite and use the Detail > Add command to select a tab name to attach that Favorite to.
     - Repeat the process until you have attached all of the tabs that you would like the Favorite to appear on.

- When adding the Detail (tab), you may also enter a Display Order that will control where this Favorite will display on the list of Favorites when accessed from that tab.
- Location Group and Staff Group filters are now available.
  - In previous versions, you could only assign Encounter Favorites to an individual staff member, or to ALL staff members.
  - You may now create Location and/or Staff Groups (using the tables), and assign them to Encounter Favorites for filtering.
  - Click the new Filter command on the menu.
    - This will open the Encounter Favorite Location/Staff Filtering window.
    - Highlight the Favorite and use the Detail > Add command to assign a Location and/or Staff Group filter.
    - These will display at the bottom of the window when highlighted on the Encounter Favorite.
    - The Staff Groups and Location Groups commands were also added for quick access to the tables.
- Grouping items together by Subgroups is now available.
  - Click the new Subgroups command on the menu.
  - This will open an 'Encounter Favorite Groups' window.
  - Click Add and create a name like 'Headaches' and save.
  - Highlight the new Subgroup and click on Detail > Add to attach Encounter Favorites to that Subgroup (Example: all items dealing with the Headaches).
  - Click Exit to close the Groups window and go back to the Encounter Favorites list.
  - Click Add to create a header.
    - In the 'Name' field, type the header that you would like to display (Example: COMPLAINT: HEADACHES).
    - In the 'Child Encounter Group Name' field, hit the dropdown and select the name of the Subgroup that you created (Example: Headaches), and click Save.
  - Highlight the new Encounter Favorite header and use the Detail > Add command to attach the names of the tabs that you would like this Subgroup to display on.
  - When accessing the Encounter Favorites list from the patient exam, you will see the header, followed by all of the Favorites that were attached to the Subgroup.
  - After creating an Encounter Favorite Subgroup, you may go back into it and Add more items, Edit the Display Order, Delete items, and Hide items.
  - The ability to create Subgroups is also available in other EHR single column tables. This will be discussed in the section on Exam changes.
- Hiding Encounter Favorites options.
  - Highlight an Encounter Favorite and at the bottom of the screen, you will see a Detail Records list of tabs that the Favorite will display for in the patient exam.
  - Highlight a Detail Record (tab name) and click the Detail > Hide command to prevent this Favorite from displaying for that selected tab.
  - If you have created a Subgroup that contains that Encounter Favorite and attached it to an Encounter Favorite header, that Favorite will still display for the tabs that are assigned to the Header.
  - Example:
    - Encounter Favorite 'Headache: Dull Ache' is set to display on the Complaint tab.
    - I highlight the Complaint tab Detail Record and Hide it; it will no longer show on the list when accessing from the patient exam.
    - I have a Subgroup called 'Headaches', and I have attached 'Headache: Dull Ache' to that Subgroup.

- I have an Encounter Favorite header called COMPLAINT: HEADACHES, and I have attached the Subgroup of Headaches to it.
- I have added a Detail Record for the COMPLAINT: HEADACHES header to display on the Complaint tab.
- When accessing the Encounter Favorite list from the patient exam, I will NOT see 'Headache: Dull Ache' in the general list of items, but I WILL see it listed under the COMPLAINT: HEADACHES header grouped section.
- This is useful when you don't want a long list of items, but a list of items that are grouped together under the headers that you create.

Table changes (Additional Items):

1. Utility > Look-up Tables > Financial > Services.
   - When exporting the Services table, the Description from Column 0 will now display in the text file.
2. Utility > Look-up Tables > EHR > Health History > Description.
   - A new 'CBS Search Acronym' field and 'User Search Acronym' field were created.
   - These are used to help narrow your search when adding Health History items to the patient exam record.
   - The 'CBS Search Acronym' field is a Compulink-owned field.
   - The 'User Search Acronym' field is a User-owned field where you can create a search shortcut.
   - Example:
     - Enter LOWBP on any record that has to do with Low Blood Pressure.
     - Go into the patient exam and add a Health History record.
       - Enter LOWBP into the Description field and click OK or hit Enter.
       - If the User Search Acronym was only attached to one item, that item will populate into the field.
       - If the Acronym was attached to more than one item, a window will open displaying all of the items to select from.
     - When the software searches the table, it will look for a match in the Description, CBS Acronym and the User Acronym fields.
3. Utility > Look-up Tables > EHR > Images.
   - For better usability, the word Bitmap was changed to Icon.
     - Bitmap is now Icons.
     - Bitmap Details is now Icon Detail.
     - Bitmap Groups is now Icon Groups.
4. Utility > Look-up Tables > EHR > Note.
   - A new Display Order field was added so Users can move most frequently used Notes to the top of the list.

Utility changes:

1. Utility > Health Care Maintenance Rules/Orders > Order Sets.
   - Location Group and Staff Group filters are now available.
   - You may now create Location and/or Staff Groups (using the tables), and assign them to Order Sets for filtering.
   - Click the new Filter command on the menu.
   - This will open the Order Set Filtering window.
   - Highlight the Order Set and use the Detail > Add command to assign a Location and/or Staff Group filter.
   - These will display at the bottom of the window when highlighted on the Order Set.
   - The Staff Groups and Location Groups commands were also added for quick access to the tables.

- These filters will control which Order Sets are used in the Visual Documentation Engine, Orders accessed from the View command and Order Sets that are triggered on events (like when you add a Diagnosis).
2. Utility > PracticeWatch was renamed to PracticeWatch Setup.
3. Utility > System Administrator > Login > IDs.
   - If you enter a Provider Restriction, the software will now filter the patients when doing a patient search.
   - Enter an ID in the Provider Restriction field, log out of the software and log back in.
   - Go to the patient demographics and click on Search and choose Patient Name.
   - The list of patients that displays will be restricted to only the ones assigned to the Provider ID that matches the ID that was entered into the Login IDs table.
   - NOTE: Searches by Account Responsible and Account # do not contain a Provider ID, so they will NOT be filtered by the Provider Restriction ID.
4. Utility > System Administrator > Login > Profiles.
   - New Right called 'Location/Staff Groups' was added.
     - Practices with multiple Locations and a large staff, can use Location and Staff Groups to tailor information displayed in the software.
     - This new Right controls access to both Group tables.
     - Set to either Full or None.
     - If set to Full, they will be allowed to access the tables and Add/Edit/Delete Groups.
     - Location and Staff Group filters will be discussed later in the course.
   - New Right called 'EHR Location/Staff Control' was added.
     - Set to either Full or None.
     - This controls who has access to assign Location Groups and Staff Groups filters via the new exam Utility command.

Patient Demographic changes:
1. Patient Tracking.
   - The resource boxes in the Patient Tracking window will now display a scroll bar if the number of patients exceeds the size of the box.

Exam changes (ALL):
1. Location/Staff Filtering was added to the Utility command.
   - In the patient exam, click the Utility command (tool icon), highlight Location/Staff Filtering, and you will see the following options: Encounter Favorites, Layouts, Order Sets and Tabs.
   - You must have Login Access Right 'EHR Location/Staff Control' set to Full to access these options.
   - Tabs.
     - This will display a list of all of your unhidden tabs.
     - Staff Groups and Location Groups commands were added for quick access to the tables.
     - Use the Detail > Add/Delete command to attach specific Location Groups and/or Staff Groups to a particular tab.
     - You may filter using both, or just by Location or Staff Group.
     - There is no limit to how many filters you can add to a tab.
     - If no filter is assigned to the tab, it will display for ALL staff logged in.
     - Example:
       - You have an ASC, and you would only like your ASC staff to access those tabs.
       - Create a Location Group or Staff Group for your ASC staff members.
       - Assign either the Location Group or the Staff Group to the tabs.
       - If a staff member Login ID is not associated with either the Location Group or Staff Group, they will NOT have access to any of the ASC tabs.

- When using the Add Tab command, the tabs that display will now be filtered for the Location and/or Staff Group that you are currently logged in under.
- NOTE: If you assign a filter, the staff will only be able to see the tab if they are logged in under a Location and/or Staff Group that is part of the filter.
- This new filtering works the same for the Encounter Favorites, Layouts (and PopUp Layouts) and Order Sets options.

2. Staff Groups was added to the Utility command.
   - Click the Utility icon and select Staff Groups.
   - This gives you quick access to the Staff > Groups table where you can Add/Edit/Delete Staff Groups on the fly.
   - You must have Login Access Right 'Location/Staff Groups' set to Full to access the table.

3. Healthy History Family grid was updated with a multi-select for the Relationship.
   - Click the Grid Edit icon.
   - Check Yes next to a Description, and then click in the Relationship field.
   - This will open a window where you can select as many family members as you need, and then click OK.
   - Once you save the Family History window, an individual record will be added for each family member Relationship.
   - This feature is also available if you use the green plus to add an individual Family History record, and select multiple family members in the Relationship dropdown field.

4. Assigning filters when creating Encounter Favorites.
   - When creating Encounter Favorites, you can assign a Location and/or Staff Group filter, a specific ID filter, or leave it open for ALL.
   - Fill in the data on the tab, left click on the panel and select 'Create Encounter Favorite'.
     - Enter a name and click OK.
     - You will then be prompted to select a Location Group, or hit ESC or the X to make available for ALL Locations.
     - You will then be prompted to select a Staff Group, or hit ESC or the X to make available for ALL staff.
       - If the person creating the Favorite is not already individually listed in the Staff Group table, the software will automatically create a Staff Group record for them.
       - Select this record if you would like to only assign the Encounter Favorite to that individual Staff person, and not an actual Staff Group.
     - Next you are prompted to select YES to confirm the addition of the Encounter Favorite.

5. Using an existing name when creating an Encounter Favorite.
   - When creating an Encounter Favorite and assigning a name, if there is already a User-owned Favorite for that tab with the same name, you will get the following message:
     Select YES to overwrite existing Encounter Favorite with same name: XXXX
   - If you click Yes, you will then get the following message:
     Select YES to Confirm update of Encounter Favorite!
   - Selecting Yes will overwrite the previous Favorite.
   - When prompted to select YES to overwrite, if you select NO, the name box will open again for you to enter a different name for the Encounter Favorite.

6. Multi-select for Diagnosis when using Encounter Favorites.
   - Select an Encounter Favorite in the exam.
   - If more than one Diagnosis was attached, a window will open allowing you to select multiple Diagnoses to add to the patient record.

7. The ability to add Subgroups to items in single column exam tables was added.
   - Right click in a field and select 'View Lookup List Entries' (Example: Allergic/Immunologic).
   - This will open the table with a list of items for that field.

- Click the Subgroups command to open the Lookup Groups table.
  - Click Add to create a Group name and save (Example: Allergies).
  - Use the Detail > Add command to attach the items in the table to the Subgroup.
  - Click Exit to close the Lookup Groups table and go back to the EHR table.
- You may attach this Subgroup to an existing USER-owned entry in the table, and use that as your header.
  - Double click on the existing entry, go to the 'Lookup Group Name' field and select the Subgroup (Example: Allergies), then click Save.
  - When accessing the table from the exam, you will be able to select the existing USER-owned entry that is your header, and be able to select any of the Subgroup items.
- If you would like to create a new entry to act as just a header, click the Add command.
  - In the 'Value' field, enter the name you would like for your header (Example: ALLERGIES).
  - In the 'Lookup Group Name' field, click the dropdown and select the Subgroup (Example: Allergies), and click Save.
  - When accessing the table from the exam, you would NOT select the generic header, but will select from the Subgroup items.
- If you would not like the individual items to display on the general list, and would only like them to display under the new header, then mark the individual items as hidden.
- You must exit the table, and exit the exam to refresh the dropdown with the new changes.

8. Default Provider ID for Next Appointment.
   - If the person that is currently logged in has a Position of Provider in the Login IDs table, their ID will default to the ID field when adding a Next Appointment in the exam.
   - If the person is not set to Provider, then the ID will default to blank, and they must select one.

PQR 2016:
- All products have had their PQR tab updated to 2016 standards.
- A new PQRInfo2016.PDF file with code changes was included with the update, and can be found in your product folder.

Client Requests that were Satisfied with this Version

1. Ability to add an Encounter Favorite for multiple IDs or a group of IDs.
   NEW FEATURE: Location Group and Staff Group filters are now available.
   - In previous versions, you could only assign Encounter Favorites to an individual staff member, or to ALL staff members.
   - You may now create Location and/or Staff Groups (using the tables), and assign them to Encounter Favorites for filtering.
   - Highlight the Favorite and use the Detail > Add command to assign the filters.
2. Ability to see which Providers are at which Location Group.
   NEW FEATURE: Utility > Look-up Tables > General > Provider.
   - A Location Groups filter was added.
   - Use the Detail > Add/Delete command to attach specific Location Groups to a Provider.
   - The Location Groups will display at the bottom of the screen when highlighted on the Provider.
3. Ability to attach an Encounter Favorite to multiple tabs. Ability to sort Encounter Favorites.
   NEW FEATURE: Assigning Encounter Favorites to multiple tabs.
   - Highlight the Favorite and use the Detail > Add command to select a tab name to attach to that Favorite.
   - Repeat the process until you have attached all of the tabs that you would like the Favorite to appear on.
   - When adding the Detail (tab), you may also enter a Display Order that will control where this Favorite will display on the list of Favorites when accessed from that tab.
4. Request that the Diagnosis list be multi-select when using Encounter Favorites.
   NEW FEATURE: Multi-select for Diagnosis when using Encounter Favorites.
   - Select an Encounter Favorite in the exam.
   - If more than one Diagnosis was attached, a window will open allowing you to select multiple Diagnoses to add to the patient record.
5. Request the option to select multiple Relationships in the Family History grid on the Health History tab.
   NEW FEATURE: Healthy History Family grid was updated with a multi-select for the Relationship.
   - Click the Grid Edit icon.
   - Check Yes next to a Description, and then click in the Relationship field.
   - This will open a window where you can select as many family members as you need, and then click OK.
   - Once you save the Family History window, an individual record will be added for each family member Relationship.
   - This feature is also available if you use the green plus to add an individual Family History record, and select multiple family members in the Relationship dropdown field.
6. Ability to search by acronyms on the Health History tab.
   NEW FEATURE: Utility > Look-up Tables > EHR > Health History > Description.
   - A new 'CBS Search Acronym' field and 'User Search Acronym' field was created.
   - These are used to help narrow your search when adding Health History items to the patient exam record.
   - The 'CBS Search Acronym' field is a Compulink-owned field.
   - The 'User Search Acronym' field is a User-owned field where you can create a search shortcut.
   - Example:
     - Enter LOWBP on any record that has to do with Low Blood Pressure.
     - Go into the patient exam and add a Health History record.
     - Enter LOWBP into the Description field and click OK or hit Enter.

- If the User Search Acronym was only attached to one item, that item will populate into the field.
- If the Acronym was attached to more than one item, a window will open displaying all of the items to select from.
- If you agree with Compulink's 'CBS Search Acronym' field, you may also enter that into the Description field and the software will use that for the search.

7. Ability to assign Order Sets to a Provider or group of Providers.
   NEW FEATURE: Utility > Health Care Maintenance Rules/Orders > Order Sets.
   - Location Group and Staff Group filters are now available.
   - You may now create Location and/or Staff Groups (using the tables), and assign them to Order Sets for filtering.
   - Click the new Filter command on the menu.
   - This will open the Order Set Filtering window.
   - Highlight the Order Set and use the Detail > Add command to assign a Location and/or Staff Group filter.
   - These will display at the bottom of the window when highlighted on the Order Set.
   - The Staff Groups and Location Groups commands were also added for quick access to the tables.

8. Default the Provider ID when adding a Next Appointment in exam, if the person logged in is set as a Provider in the Login IDs table.
   NEW FEATURE: Default Provider ID for Next Appointment.
   - If the person that is currently logged in has a Position of Provider in the Login IDs table, their ID will default to the ID field when adding a Next Appointment in the exam.
   - If the person is not set to Provider, then the ID will default to blank, and they must select one.

9. Ability to limit exam layouts to specific staff members.
   NEW FEATURE: Location/Staff Filtering was added to the Utility command.
   - In the patient exam, click the Utility command (tool icon), highlight Location/Staff Filtering, and you will see the following options: Encounter Favorites, Layouts, Order Sets and Tabs.
   - You must have Login Access Right 'EHR Location/Staff Control' set to Full to access these options.

10. Display the Description from Column 0 when exporting the Services table.
    NEW FEATURE: Utility > Look-up Tables > Financial > Services.
    - When exporting the Services table, the Description from Column 0 will now display in the text file.

11. Request to add a Display Order to EHR > Notes table.
    NEW FEATURE: Utility > Look-up Tables > EHR > Notes.
    - A new Display Order field was added so Users can move most frequently used Notes to the top of the list.

12. Ability to filter the patient name search based on the Provider Restriction set up in the Login IDs table.
    NEW FEATURE: Utility > System Administrator > Login > IDs.
    - If you enter a Provider Restriction, the software will now filter the patients when doing a patient search.
    - Enter an ID in the Provider Restriction field, log out of the software and log back in.
    - Go to the patient demographics and click on Search and choose Patient Name.
    - The list of patients that displays will be restricted to only the ones assigned to the Provider ID that matches the ID that was entered into the Login IDs table.

13. Request scroll bar be added to Patient Tracking resource boxes.
    NEW FEATURE: The resource boxes in the patient tracking window will now display a scroll bar if the number of patients exceeds the size of the box.

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