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Your EHR/PM Business Partner

Psych Advantage
Version 11.0.9 Enhancements (4/18/2017)

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

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

Appointment Enhancements

.Daily Detail > AM/PM Totals

- The bottom left of the screen will now display the AM and PM Appointment Totals next to the Total number of Appointments.

- These AM/PM Totals were also added to the Office at a Glance and Week at a Glance Views. They will display at the bottom of each column next to the Daily Totals. (Client Request)

.Daily Detail > Automatic Refresh

- If you leave the Daily Detail window open, go to the Demographic screen and search for another patient, and then come back to the Daily Detail screen, the software will automatically refresh the Appointment Scheduler information so you can book an appointment for that new patient. (Client Request)

.Daily Detail > Date/Location/Provider/Department Field Enhancements

- The size of the Date, Location, Provider and Department fields have been increased so they can be viewed more easily on the screen. (Client Request)

- The Location, Provider and Department field drop-downs are no longer additional PopUp windows with an X to close.

- The Provider field displays the ID followed by the Name. When clicking the drop-down, the list will now display in the same order. (Client Request)

- The Provider drop-down is capable of type-ahead. (Client Request)
    - Click the drop-down to open the table.
    - Type a letter and the highlighted line will jump to the first ID that starts with the letter.
    - This type-ahead feature also works when using the Resource command and selecting additional resources to add to the view.

.Daily Detail > Highlight Newly Booked Appointment

- After saving a newly booked Appointment, that record will now stay highlighted in the Daily Detail screen. (Client Request)

.Daily Detail > Multiple Resource Scheduling

Appointment Enhancements

• If a segment ID is not found when trying to book an Appointment using Multiple Resource Scheduling, you will now receive an error message with the following information:
  • Appointment Type
  • Segment level and ID
  • Direction to the Appointment Types table to correct the problem

Block Command > ALT + K to Block Time

• You can now use the ALT key plus the letter K (at the same time) as a keyboard alternative to clicking on the Block command to Block a time slot. (Client Request)

Block Command > Minimum Block Duration of 1 Minute

• The minimum duration for a Block has been changed from 5 minutes to 1 minute. (Client Request)

Cancel Command > Confirmation Window

• When right clicking on an Appointment and selecting Cancel, a window will now open asking you to 'Confirm cancellation of this appointment.' (Client Request)

Column Command > Customization of Patient Area

• Under the Patient area, you now have access to User fields 1-5. (Client Request)

Edit Command > Hiding the Patient Demographics

• When you are Editing an Appointment, the patient Demographic screen will temporarily be hidden from view.
• This will make the Edit screen the main focus, and not allow it to accidentally be moved behind the Demographics.
• Once the Appointment is saved, the Demographics will then be displayed again.

Goto Patient Command > Moved to Top of List

• When right clicking on an Appointment, the Goto Patient command has been moved from the bottom to the top of the list. (Client Request)

Move Command > Error If Moving to Blocked Time

• If you are using the Move command to move an Appointment, and the time slot is Blocked, you will now receive the error: 'A timeslot is blocked on that day'. (Client Request)

Move Command > Move ID Displaying in Audit Trail

• If you Move an Appointment from one time slot to another, the ID of the person that is logged in will now display in the Appointment Audit Trail. (Client Request)

Multiple Command > Default to Time of Appointment

• When using the Multiple command, the Hour Range start time will now default to the same time as the original Appointment time. (Client Request)

Multiple Command > Forward the Notes Field

• When using the Multiple command to book Multiple Appointments, if there are any comments in the Notes field, those comments will now be forwarded to ALL of the Multiple Appointments that are booked. (Client Request)

Appointment Enhancements

No Show Command > New No Show Command

- When right clicking on an Appointment, a NEW 'No Show' command was added to save time and clicks. (Client Request)
- Once you select 'No Show', a window will open to confirm 'Set appointment status to No Show?'

Note Command > Larger Daily Notes Box

- The size of the Daily Notes box has been increased. (Client Request)

Reschedule Command > Display Location Code/Name

- When right clicking on an Appointment and using the Reschedule command, the Location field and drop-down will now display the Location Code first and then the Name. (Client Request)

Reschedule Command > Display Rescheduled Appointment

- After rescheduling an Appointment, the software will now return you to the Scheduler and the new Appointment time will be displayed. (Client Request)

Reschedule Command > Reschedule Manually

- In addition to right clicking on the Appointment and selecting Reschedule, you now have the option of Editing the Appointment and manually changing the Status to Reschedule. (Client Request)
- Save the Appointment, go to the new time slot and either Insert or Edit.
- All of the previous Appointment information will populate the Add/Edit/Insert Appointment window.

View Command > Month at a Glance Changed

- The Month at a Glance command will no longer bring up a Crystal Report.
- This new window will give you the following NEW options:
    - Click Back/Next to change months
    - Refresh the data
    - Display a Total number of Appointments for the Month
    - Select a different Location/Provider/Department

View Command > Week and Office at a Glance Additional Window

- When clicking the View command and selecting either Week or Office at a Glance, the secondary window with the Calendar/Location/Provider selection option will no longer pop up. (Client Request)
- If changes need to be made to those options, they can be made in the Daily Detail window prior to clicking on the View command.

Wait List Command > Goto Patient Command Added

- Under Wait List > View Waiting List, you now have the option to right click on a patient and select the 'Goto Patient' command. (Client Request)
- Once you select the command, the Wait List window will stay open, but the patient screen behind the window will change to the patient that you selected Goto for.

Communication Enhancements

InBox > AdvantageRCM Reminder

Communication Enhancements

- If your practice is not utilizing AdvantageRCM (Revenue Cycle Management), once a quarter, staff established as 'Owner' will receive a message.
- This message will no longer pop up when logging into the software, but will be delivered to the InBox.
- When Viewed, it will open a PDF file with information about Compulink's Revenue Cycle Management billing service.

InBox > Owner/Manager Satisfaction Survey

- The 'Owner/Manager Satisfaction Survey' will no longer pop up when logging into the software, but will be delivered to the InBox.
    - If this survey is not viewed in the InBox, after 7 days it will once again pop up upon logging into the software.

- When filling out the Survey, if you select a Service Satisfaction Level of 'Neutral' or 'Dissatisfied', and do NOT add any Optional Comments, you will receive a confirmation window asking you to please enter a brief comment on how we can help you.

Service Satisfaction Survey > Submit Button Disabled

- After completing the information and clicking on Submit, the button will now temporarily be disabled until the Survey has been sent. (Client Request)

Customization Enhancements

Screen Builder > ALL > Add Modified Date Column

- A Modified Date column was added to the window that displays when loading a layout or tab. (Client Request)
- This will allow you to see the last time items were modified, and may help in troubleshooting possible customization issues.
- This field is also sortable, so if you click on the Modified header, the layouts and tabs will sort by the Modified Date.

Screen Builder > ALL > Change Display Order on CBS Owned Layouts

- You now have the ability to change the Display Order on CBS owned layouts. (Client Request)
- Type the order number and then either tab or click out of the field to automatically save.

EDI (Electronic Billing) Enhancements

Insurance Activities > Billing > Errors Now Logged to Error.Log File

- When creating an EMC Claim File in previous versions, if an error occurred, a message would pop up on the screen and you would have to click OK to continue.
- If an error should occur now, it will be automatically written to the Error.Log file, no message will pop up, and the function will continue to run.

Examination Enhancements

Crystal Reports > Medication Prescription

- The 'Days of Use' field will now print on the Medication Prescription. (Client Request)

Layouts > Enhancements Made to Existing Compulink-Owned Layouts

- The following are for Psych Advantage ONLY:

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Examination Enhancements

- All Psychiatric and Med Monitoring layouts.
    - The MU tab has been removed from all of these layouts.

Open Office Documents > Enhancements Made to Existing Compulink-Owned Documents

- The following are for Psych Advantage.
- Updates were made to several documents for the following items:
    - Physical Exam area
        - Added new fields for General Appearance, Behavior, Skin, Head / Eyes / Ears / Nose / Throat, Gastrointestinal, Immune, Cardiovascular, Pulmonary, Endocrine and Neurologic.
    - Allergies and Medications
        - When printing an exam from a previous date of service, the Allergies and Current Medications that were current on that selected date will now print, and not the ones from the most recent date of service.

- The document NORCDiagnosticGambling has been renamed to ExamAssessNorcDiagnostic.

- The Treatment Location was added to the following documents:
    - ExamTherapyBIRP
    - ExamTherapyDAP
    - ExamTherapySOAP

Open Office Documents > New Document Added

- The following NEW Open Office document was added for Psych Advantage ONLY:
- ExamGroupNotes - It contains the following items:
    - Therapy/Treatment Name
    - Treatment Location
    - Diagnosis
    - Treatment Type
    - Time
    - Therapy/Session Notes
    - Individual Notes

Open Office Documents > New Documents Added

- The following NEW Open Office documents were added:
- CCDAcknowledgeReceipt
    - For helping achieve Advancing Care Information/Meaningful Use Measure: Secure Messaging. (Client Request)
    - Allows you to send a secure message to the patient portal with the message 'This is to acknowledge receipt of your MySecureHealthData electronic message you transmitted to our office.'
    - Send using the Print command:
        - Click the Print command and select 'Letter to Portal'.
        - Click the drop-down and select CCDAcknowledgeReceipt.
        - The E-Mail Subject window opens for you to Enter Text for a Subject and click OK. This will show as the Subject of the letter sent when the patient views it on the Portal.

- ExamCommunication
    - This NEW document will merge all of the data from ALL of the Communication records entered for the active patient. (Client Request)

Examination Enhancements

Subtables > Editing Previous Exam Subtables

• The ExamMaterial and ExamTreatment Subtables have been opened to allow editing of records that were posted on previous exam dates.
• This will allow you to enter Notes, Post Op Diagnosis, etc.

Tabs > Enhancements Made to Existing Compulink-Owned Tabs

• The following are for Psych Advantage ONLY:
• Complaint tab (ALL Complaint tabs)
  • Diagnosis panel - 'Mark like Diagnoses Resolved' button added.
    • Enables you to resolve like Diagnoses with a single click vs. editing each individual record.
    • Highlight a Diagnosis that you want to mark Resolved and click the Stop icon.
    • The software will mark that Diagnosis as Resolved, as well as any other record with a matching Diagnosis code.
    • It will also find any associated ICD-9 code and mark that resolved as well.
    • This button was also added to the Diagnosis panel on ALL Plan tabs.

• Session Note
  • Diagnosis/Plan panel - The 'PQR/Quality Measures' button was added.
    • When clicked, it will add either the PQR 2016 tab or the Quality tab, based upon the current exam date.

• Substance (tablet)
  • The 'TB Screening' GridEdit button was removed, as this is no longer needed.

Tabs > Enhancements Made to Existing Compulink-Owned Tabs

• The following is for ALL Advantage products:
• PopUpLab, PopUpOrders and PopUpTest
  • The following change was made to the PopUp tabs, so it will be reflected on ALL tabs that access the Labs, Orders and Tests.
  • If the staff member adding the record is logged in with Role of Scribe, the 'Order By' ID will now default to the Provider ID that was selected upon Login.

Visual Documentation Engine (VDE) > Clear Findings/Order Sets

• A new Eraser icon was added, that when clicked, will clear the Clinical Findings and Order Details fields and allow you to start over.

Visual Documentation Engine (VDE) > New Measure Draw Tool

• The Visual Documentation Engine (VDE) has a new Draw Tool called Measure that can be used ONLY with DICOM images.
• Import your DICOM image into the exam and open it in the VDE.
• Click the drop-down at the Draw Tool and select Measure.
• Left click on the image where you want to start the measurement, hold the left mouse button down, drag it to where you want to stop the measurement and let the mouse button go.
• This will give you a GENERAL measurement of the selected area; this is NOT A SCIENTIFIC measurement.
• Results are based upon the outside DICOM image data that was originally imported into the Advantage software.

Visual Documentation Engine (VDE) > Single View Options

• New options were created for the Single view in the Visual Documentation Engine (VDE).

Examination Enhancements

- The following options will only be seen if 'VDE Dual Image Enabled' is set to 'N' under the Login ID table.
    - Hide Ribbon: Left click on the Ribbon and select 'Hide Ribbon' to hide the display of the Ribbon across the top.
    - Display Ribbon: Left click on the image and select 'Exit Quick Drop Mode'. Left click on the image again and select 'Show Ribbon'. In this menu, if 'Show Ribbon' is checked, you can select it to uncheck it, and it will also Hide the Ribbon.
    - Filter Ribbon by Type: You have the option to filter the Ribbon by Templates, Drawings and Images.
    - Filter Ribbon by Age: You also have the option to filter the Ribbon by All, <3Mo, <1Yr or <2yr.
    - Side by Side: Left click on the image and select 'Side by Side'. This will give you 2 images side by side.
        - Left click on an image in the Ribbon to select the image that you would like to display on the left side of the window.
        - Right click on an image in the Ribbon to select the image that you would like to display on the right side of the window.
        - Left click on an image and select 'Side by Side' to go back to the Single view.

Function Enhancements

Direct E-Mail Receive > Updated Formats Received

- This function has been enhanced to be able to receive all of the following formats (Client Request):
    - More types of CCD/CCR files, and ZIP files where there is a valid XML file inside
    - Message formats: Wrapped and Unwrapped
    - Signing Algorithms: SHA-1 and SHA-256

Insurance Activities > Billing > Increased Speed

- Enhancements were made in the software to increase the overall speed of the Billing function.

Lock Box Payment Import > New Function Added

- The Lock Box Payment Import is available for all clients not utilizing the Advantage Revenue Cycle Management Services.
- This NEW Function is used to import a specifically formatted file (delimited) containing patient responsible check payment information from a third party into the Advantage software.
- Upon update, the software will create a LOCKBOX folder inside your Advantage product folder. Save the file to this folder.
- Importing the Payments:
    - Click Function > Lock Box Payment Import.
    - The folder will default to the LOCKBOX folder in your Advantage product folder. Select the file to Import.
    - Click OK on the message: Patient payment import process complete
    - If a payment was found for a patient that could not be matched in the database based upon their Account #, a Patient Search window will appear for you to select the patient to apply the payment to, or click Exit to skip the payment posting. This could be due to a misspelling in the name.
    - If you choose to skip the payment, a confirmation window will appear for you to select Yes/No.
    - If you import the same patient/check number as a previous import, it will stop the duplicate from entering.

Function Enhancements

- Once complete, click OK on the message: Payments have been posted to Accounts!
- Viewing the Payments on the Ledger:
  - The payment can be found on the Ledger with the Paid Date that was recorded in the data that was imported, NOT the Date that the file was imported into the Advantage software. If the import file was from your bank, this will match the deposit dates for your reporting.
  - Payments will be distributed to the OLDEST balance as if the payment was posted at the Ledger via the Credit > Auto Resp All option.
  - If the amount of the payment exceeds the balance on the Ledger, the remaining payment amount will be added as an Unapplied payment.
- Viewing the Payments in the Batch:
  - When the payment file is imported into the Advantage software, a Batch is automatically created.
  - To view all of the payments in the Batch, run the Batch Transactions report.
  - When the Batch is created, both the Opened and Closed Date are assigned the date of import, so that date MUST be included in the Opened From/To.
  - The Deposit Date is assigned the date that matches the payment date of the last line item in the payment file. If you are not sure what this date is, enter a wide date range in the Deposit From/To.
  - The LOC (Add Location) is assigned the Location code of the office that imported the file, so you may select a Location, or run * for ALL.
  - Both the Opened By and Posted By IDs are blank, so leave the * for ALL.
  - You may choose to run the report for Batch Name 'Lock Box Payment' to ONLY view these types of payments.
  - Enter any other Parameters that you wish and click Begin.
  - All Lock Box Payments will be found under Closed Batches.
- See the Advantage Help file for an example of the exact file format requirements.

Ledger Enhancements

Batch Command > New Worklist Option

- A NEW Batch option called Worklist was added for Batch Check Posting for Insurance Payors.
- Adding a Batch:
  - Click Add; the Open date will default to the current date, and the By ID will default to the current Login ID.
  - The Deposit date defaults to the current date, but may be changed if needed.
  - Enter a Name for the Batch; example (Payor name - check #).
  - Enter the Amount of the check.
  - Select the Payor from the drop-down that you are posting the payment for.
  - Click Save.
  - Any patients with outstanding balances assigned to the selected Payor, will be displayed on the left side of the window with the expected balance.
- Posting a payment:
  - Double click on the patient to go to their Ledger.
  - A 'Credit Line Item Posting' window will automatically appear for you to enter the amount of the payment for this patient.
  - Enter the total amount of payment for this patient, and apply it to the charges as a normal Line Item Posting payment.
  - After posting the payment, the Batch window will automatically update.
    - The patient will now be listed on the right side under the 'Patients where Check Applied' with the Paid amount.
    - The Pending Total for ALL patients will be reduced by the amount of the payment posted.

Ledger Enhancements

- Double click on the next patient you want to post a payment for.
- Closing a Batch:
  - When all payments have been posted, and the Pending is $0.00, click Close to close the Batch.
  - The current date will then display next to Closed.
- Batch Check Posting Window:
  - Add – Add a new Batch.
  - Edit – Edit the displayed Batch.
  - List – Display a List of ALL Batches.
  - Reopen – Reopen the displayed Closed Batch.
  - Close – Close the displayed Batch.
  - Detail – Open the 'Batch Posting Detail' Crystal Report.

Charge PopUp > POS 02 Telehealth

- Place of Service '02 Telehealth' was added to the Pos drop-down. (Client Request)

Print Command > New Report Added

- The following NEW report was added: Ledger_Archive
- Information available on this report are the inactive Ledger items that are no longer displayed on the Ledger, but can be viewed by clicking on Options > View Archive.

Look-up Table Enhancements

Financial > Payors > Compulink Table Updates

- The Compulink Table Update menu option was removed, as these updates are automatically downloaded with the Advantage Software version updates, and no longer need to be done manually.

Patient Area Enhancements

Patient Portal > Shared E-Mail

- Family members may now share an E-Mail account and still access the Patient Portal. (Client Request)
- When accessing the Portal, enter the shared E-Mail address and click Log In.
- Then enter the birthdate and First Name of the person that you are accessing the Portal for and click Next.
- Finally, enter the Password and the answer to the Secret Question and click Log In.

Patient Tracking Command > Display Changes

- When viewing the Stops in the Tracking window, the ID of the staff member that is logged into the workstation(s) assigned to the Tracking stop, will display in the header to the right of the name of the Stop.
  - These will only display if the Patient Tracking Stop has been assigned in the Workstation Setup.
  - Hover over the initials to view a PopUp with the full name.

- When viewing the patients in the Tracking window, the ID of the staff member that moved them to that Stop will display to the right of the patient name.

- A new 'In Office' window was added.
  - This will display all patients that have been 'Arrived' into the office, the Stop that they

are currently at, and the minutes that have elapsed since their scheduled Appointment time.
- This window is listed as a Stop under the Configuration command, so you may uncheck it if you do not want it to display in the Patient Tracking window.

Patient Tracking Command > Double Click Patient to Goto

- Double clicking on the patient name will act as the 'Goto' feature and change the Demographic screen to the patient that you double clicked on. The Tracking window will stay active.
- NOTE: If your workstation is set up as a Tracking Stop on that patient's Appointment type, it will prompt you to move the patient to your Stop. If you do NOT want to move the patient to your Stop, make sure that you hit Cancel on the 'Moving Patient' window.

Patient Tracking Command > Drag and Drop to Move

- When using the Drag-and-Drop method to move a patient from one Stop to another, you will no longer be prompted to Confirm the Move.

Patient Tracking Command > Limited to One Window

- So as not to slow down the Tracking of patients, you are limited to having one Patient Tracking window open at a time on your workstation.
- If you attempt to open another window on your workstation, you will receive the following message: Another patient tracking window is already open.

Patient Tracking Command > Location Field Display

- The Location field and drop-down will now display both the Location Code and Location Name for easier selection. (Client Request)

Tabs > Enhancements Made to Existing Compulink-Owned Tab

- The following changes were made to the Patient tab:
    - Insurance panel - Verified Y/N will now display in the grid.
    - Referral Sources panel - The Fax number will now display in the grid.
    - Scanned Documents panel - The View icon was added. When clicked, it will open the highlighted document in the Scanned Document window.
    - Lock-Out panel - This is a NEW panel that was added. See the Compulink Help file for information on using the Lock-Out feature.

Tabs > New Tab Added

- A NEW 'Patient (HiRes)' tab was created to allow you to view more information on one screen.
    - Effective in version 11.0.9.3, this high resolution tab has become the default for ALL Advantage products.
    - If your monitors are not yet equipped for the HiRes tab, and you do not wish to use the scrollbar, you may revert back to the LowRes Demographics tab with the following steps:
        - Go into Screen Builder (Patient) and load the Default layout.
        - This layout is most likely Compulink Owned, so mark it as Hidden.
        - Duplicate the layout to create a User Owned copy.
        - Unhide this new User Owned copy.
        - Remove the Patient (HiRes) tab.
        - Add the Demographics tab and move it to the correct position.
        - You also have the option of changing the layout width to 1280 and height to 1024 to match the LowRes version.
        - Save the layout.

Patient Area Enhancements

Todo Command > Department Field

- The Department field may now be left blank. (Client Request)
    - If you assigned your staff a Department in the Login ID table, in previous versions, a Department ID also had to be assigned to the Todo. This is no longer required.
    - As long as the ID field is completed, the Todo will appear on the staff member's list of Action Items.

Web Registration > Zip Code Format

- If your office is located in Canada, and requires a Zip Code or Postal Code in a different format, this option is now available. (Client Request)
- Please contact your Compulink Implementation Coordinator or Web Registration Administrator for instructions on setup.

Worklist Command > Drill Down Capability

- A new 'Drill Down' capability has been added that will allow you to run a 'parent' Worklist, and then Drill Down multiple 'child' Worklists from that original 'parent' data.
- As an example, the 'parent' Worklist may show all active Insurance Payors. Double click on a Payor, and it will show the 'child' Worklist, which is all patients currently assigned to that Payor.
- You could even start a level higher and select the 'parent' of Plan Type, then 'child' of Payor, then 'child' of patient.
- In the Data Mining Tool, you would start with creating the last 'child' Worklist first. In our example, the patient Worklist.
- As you create the upward chain, you select the 'Child Name' of the Worklist that will run off of the one that you are currently creating. You will also assign the 'Child Param List' or the parameters that you are going to pass from this Worklist to the 'child' Worklist. This can be any field from the SELECT statement.
- Special Note: Parameters filled out for the 'parent' (such as :ID or :STARTDATE, etc..) are automatically passed to the 'child'.
- Compulink will be creating some default 'Drill Down' Worklists and delivering them with future versions.

Worklist Command > New Worklists Added

- One 'Standard' Worklist was added to the software.
- Post Payment Statement Review
    - This will list patients who had an insurance payment within a specified date range, who also have a resp. balance.

- Four NEW 'Drill Down' Worklists were added to the software.
- Insurance Receivable Aging
    - This will provide a simple glance at the Insurance Receivable, broken up by aging.
    - When you double click on a payor, a child Worklist will be called that will drill down to the patient level.
    - Double click on a balance listed under an aging column and another child Worklist will be called that will display the charges that comprise that balance.

- Insurance Unbilled Charges
    - This will show a list of payors where charges exist, but have not been billed, broken up by aging.
    - When you double click on a payor, a child Worklist will be called that will drill down to the patient level.
    - Double click on a balance listed under an aging column and another child Worklist will

Patient Area Enhancements

be called that will display the charges that comprise that balance.

- RCM: Insurance Receivable Aging
    - This is a specialized version of the Insurance Receivable Aging Worklist, designed for EDI and RCM (Revenue Cycle Management) needs.
    - Unlike the other Worklist, this one will look for the following items on the Insurance screen:
        - Batch Bill = Y
        - EMC Destination Code may not be empty, and may not be equal to either VSPCLAIM or TRIZETTO

- RCM: Insurance Unbilled Charges
    - This is a specialized version of the Insurance Unbilled Charges Worklist, designed for EDI and RCM needs.
    - It will look for the same items on the Insurance screen as the RCM: Insurance Receivable Aging Worklist.

Worklist Command > Number of Worklists Opened

- The number of Worklists allowed to be opened at one time has been expanded from 5 to 10.
- This is available in ALL areas where Worklists can be used.

Worklist Command > Standard Icons Removed

- The standard icons that are seen on top of most of the screens have been removed, as they are not needed when managing a Worklist.

Report Enhancements

Electronic Health Records > New Report Added

- The following NEW report was added: MACRA Readiness Review
- It is a summarized count of patients with qualifying encounters, that is, exams that are signed off on, with some subtotal counts by billing type.
- Patients count as Medicare or Medicaid based upon the 'Type' field on their Insurance record attached to charges with a service date the same as the exam date for a qualifying encounter.
- Dual eligibility is determined based on the overall pattern of Medicare and Medicaid billing.
- The report also has demographic summaries for those patients for Ethnicity, Race and English-Primary language.
- Options/Parameters for running the report include the following:
    - Start/End Exam Date
    - ID (ID of Signer) = Login ID of the person who signed off on the Exam. You may run with * for All.
    - Role of Signer (*for all) - Default is Provider. This is based on the Role assigned in the Login ID table.
    - Show Patient List?
        - If set to True, the Account#, encounter subtotals and demographics will show for each patient.
        - If set to False, only the overall summaries are shown.
- Select your Options and click Begin.
- The top of the report contains the following information:
    - Report Definition and Data Source
    - Option Definitions
    - Column Legend for the Patient List
- If you selected to 'Show Patient List?' this would follow the Column Legend.

Report Enhancements

- The Engl (Language), Race and Ethnicity columns are populating from the standard Compulink demographic fields.
- If you are using custom fields to track this information, your data will not be accurate.
- Patient Billing Type Summaries
    - Graphs displaying Medicare, Medicaid and Medi/Medi vs All Patients.
    - Total number of patients for All Other Patients vs one of the above, as well as percentages.
    - Also includes an explanation of the summary information that is displayed.
- Patient Demographic Summaries
    - Patient Ethnicity Total number of patients and percentages.
    - Patient Race Total number of patients and percentages.
    - Patient Primary (Language) vs All Patients Total number of patients and percentages.

Financial > Acct Management > New Report Added

- The following NEW report was added: QPP (PQR) Compliance 2017
- Use this report to determine your Physician Quality Reporting Percentage for each Measure.
- Measures included on this report can be found on the Quality tab in your EHR.
- This report pertains only to the CLAIMS submission method of reporting the Measures.

Financial > Acct Management > New Report Added

- The following NEW report was added: Accts Receivable by Service Loc
- Options/Parameters for running the report include the following:
    - Location (Service Loc)
    - ID (Provider)
    - Department
    - A/R Date
    - Financial Plan (Patient)
    - Minimum Days Old
    - Show Detail?
        - Overall detail.
        - A/R responsible aging is hidden on the account if it is 0 (no responsible balance).
    - Show Expanded Detail?
        - Responsible aging, per account with limited contact info.
        - A/R responsible aging is hidden on the account if it is 0 (no responsible balance).
        - Expanded detail view to aid in contacting patients for any collection activity.
    - Minimum Account Balance
    - Maximum Account Balance
    - On Collection ONLY?
    - Group By Age?
        - Group by aging is based on account age (oldest open charge), but aging summaries are based on ALL transaction aging.
    - Responsible Only View?
        - This shows the responsible aging AND the overall aging, but only for accounts WITH a responsible balance.
        - Ages accounts by the charge with the oldest open responsible balance.
- Select your Options and click Begin.
- The top of the report consists of the Data Source and Report Definition.
- The report also includes various charts and tables.

Financial > Acct Management > Reports Moved From Beta to General Release

- The following reports have been available in the software as BETA reports, and have now been

Report Enhancements

moved into general release with NEW names.

- Financial > Acct Management > Ins. Receivables by Payor
    - This was previously the --BETA Insurance Receivables report.
    - Eventually this new report will replace the legacy Ins. Receivables by Carrier report.

- Financial > Acct Management > Missing Insurance Payor
    - This was previously the --BETA Missing Insurance Carrier report.
    - Eventually this new report will replace the legacy Missing Insurance Carrier report.

- Financial > Acct Management > Sales Tax History
    - This was previously the --BETA SALES TAX HISTORY report.

Financial > Daily > Reports Moved From Beta to General Release

- The following reports have been available in the software as BETA reports, and have now been moved into general release with NEW names.

- Financial > Daily > Daysheet by Post Date
    - This was previously the --BETA Daysheet report.
    - Eventually this new report will replace the legacy Daysheet report.

- Financial > Daily > Payments
    - This was previously the --BETA Payments report.
    - Eventually this new report will replace the legacy Payment report.

Utility Enhancements

PracticeWatch Setup > 'Catch-Up' for Report Tasks

- A new 'Catch-Up' feature was added for Report Tasks, E-Mail with Report Tasks and Compulink established Function Tasks.
- In the event that the PracticeWatch Service is shut down for any reason (manually, power outage, etc.), when it is turned back on, if you had Report or Function Tasks set up to run during the outage, the software will 'Catch-Up' to those Tasks.
- This 'Catch-Up' feature will look at the Last Run date and Task Scheduling to determine if the Task needs to be run.
- If a Task was set to run Daily, and the Service was down for 3 days, it will go back and run that report for the 3 days that were missed.
    - Be aware that there is NO LIMIT on how far back the Catch-Up feature can run.
    - If Catch-Up is running for Daily Tasks that are older than a week, this may interfere with the running of current Daily Tasks.
    - To prevent the Catch-Up feature from running, simply edit the Task and change the Start date to a future Date/Time (this may even be one minute in the future).
- You may also have an old Report Task with 'Hide' checked.
- If you Unhide an old Task, the Task Scheduler window will open to allow you to set the date that you want to start running the Task.
    - You will only be able to save the Task if the Date/Time are AFTER the current Date/Time.
    - This will prevent it from looking at the Last Run date and invoking the 'Catch-Up' feature to the current date.

PracticeWatch Setup > Text Message Task

- The Text Message Task will no longer fail if it finds a patient with a land line entered into the

Utility Enhancements
cell phone field. (Client Request) • The patient will be skipped and the process will continue on to the next patient on the list.
System Administrator > Login > IDs • When adding a new Login ID, the 'Learning Mgmt System' field will now default to 'Y'. • This indicates that you want a student account activated for this User in the Compulink University LMS. • If set to 'Y', the E-Mail field becomes mandatory to fill out.

New Features & Enhancements for Previous Version Builds:

11.0.8 (1/5/2017)

11.0.7.2 (11/28/2016)

11.0.7.0 and 11.0.7.1 (9/26/2016)

11.0.6.4 (2/10/2016)

11.0.6.3 (11/07/2015)

11.0.6.2 (11/07/2015)

11.0.6.1 (10/07/2015)

11.0.6.0 (09/03/2015)

11.0.5.6 (08/10/2015)

11.0.5.5 (07/31/2015)

11.0.5.4 (07/02/2015)

11.0.5.3 (06/24/2015)

11.0.5.2 (05/11/2015)

11.0.5.1 (04/15/2015)

11.0.5.0 (03/23/2015)

11 (< 11.0.5.0)