compulink
Your EHR/PM Business Partner

Psych Advantage
Version 11.1. Enhancements (10/6/2017)

Take Course Now! Click to watch a video of these enhancements in Compulink University.
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.

HOT TOPICS
Look-up Tables > General > Location > Location Groups

• When you update your software to an 11.1 version, a routine runs that automatically creates:
    • A Location Group for each licensed Location, identified by the Location Name.
    • A Location Group for ALL Locations, identified as ALL Locations.
    • In addition, you can add more Location Groups, with any combination of Locations desired.
• The Location Group functionality is being introduced to reports starting in Version 11.1.
    • As we update the many Advantage reports that have Location options, you will see Location Group options replacing them.
    • This enhancement will apply to Demographic, Service and ADD Location options.
• The Location Group can also be seen in the Insurance Billing Function.

Utility > System Administrator > System Setup > CBS E-Rx Start Date
 • On the 'System Administrator' tab, there is a NEW field called 'CBS E-Rx Start'. • For clients that want to start using AdvantageERx for their electronic prescriptions, this field will be replacing the use of the ERX.flg file. • Do NOT edit this field without contacting the Customer Care department first.

Appointment Enhancements
Daily Note Command > F2 Key to Save
 • You now have the option to use the F2 key to save the Daily Note. (Client Request)
Free-Floating Date Selection Calendar > Enhancements

• Remember 'Apply to All Schedules' Setting
    • The calendar will now remember the setting (checked or unchecked) for the 'Apply to All Schedules' field, and will use that same setting when you close and re-open the Scheduler. (Client Request)
 	
• Remember Last Location on Screen
    • The calendar will now remember where it was located on the screen when you exit the Appointment Scheduler, and will appear at the same spot when you re-open the Scheduler. (Client Request)

Appointment Enhancements

Goto Patient Command > Display Scheduler in Background

- When you select 'Goto Patient', you will be taken to the demographic screen of the patient as usual, however, now the Scheduler will continue to display behind the demographics. (Client Request)
- This will allow you to quickly return to the Appointment Scheduler as needed.

Multiple Command > Multiply Blocks

- You now have the option to use the Multiple command on Blocked time slots. (Client Request)
    - Highlight the Blocked time and click the Multiple command, or right click on the Block and select Multiple.
    - This opens the 'Book Multiple Appointments' window, and the following information is displayed: Patient (BLOCKED), Provider, Appt (date, time and minutes blocked), Remarks and Status.
    - Check the box next to the days of the week that you would like the Block to appear in.
    - Enter the Number of Weeks you would like to multiply the Block out for.
    - Click the 'Confirmed Booking' button.
    - A Confirm window will appear for EVERY date and time that you chose to Block.
    - Select 'Yes' to confirm each individual day, 'No' to bypass an individual day, 'Cancel' to Cancel the Multiple process, or 'Yes to All' to confirm ALL Blocks at one time.
    - When done, click OK on the message: Booking Completed.

Print Command > Patient's Date of Birth Added

- When printing the 'Selected Resource > Alphabetically', the patient's date of birth will now display on the report. (Client Request)

Search Command > Search by All Providers

- You now have the option to select 'All' as the Resource and search for an appointment across all Provider schedules. (Client Request)

Tools Command > .New Tools Command Added

- A NEW 'Tools' command drop-down was added.
- The following items were moved from Main Menu > Utility > Appt Utilities for better access:
    - Move Appointment
    - Template Editor
    - Template Scheduler
    - These items will only be visible if the User has access rights to these options.
- The following items were moved from the Main Appointment screen:
    - Resource
    - Column
    - Quote
    - Daily Note

Tools Command > Move Templates Command Added

- A NEW 'Move Templates' command was added under the NEW 'Tools' drop-down.
- This is an efficient way to change a provider's schedule for a specified time period, without editing each day manually in the Template Schedule.
- Use the parameters to choose all or certain days of the week, set a date range and identify the From and To Templates.
    - Location - must match the original template.
    - Provider - must match the original template.
    - Dept (if applicable) - must match the original template.

Appointment Enhancements

- This option displays if you have one or more entry in the Departments table and two or more Templates using Department.
- Date Range From and To - use the calendar drop-down to select the dates.
  - Once you select the Date Range, the Date, Location, Provider, Template and Department information for that Range will display to the right.
- Days of the Week - all days are selected by default.
  - Click to remove the checks on any days you want to exclude from the operation.
  - Those days will be filtered off of the grid on the right.
- From Template - defaults to All.
  - Use the drop-down to choose a template name.
  - Only Dates with the selected template name will appear in the grid.
- To Template - choose the template name you wish to move the schedules to.
- Click Apply.
- The Dates in the grid will now be moved to the new Template.

Communication Enhancements

Customer Feedback > Referral Program Section Added

- A NEW Referral Program section was added to the bottom of the window.
- You are able to view the basic information, and then click in the window if you are interested in more detailed information about the program.

Customer Feedback > SKIP RECEPTIONIST/HOLD MSG Added

- The following message was added to the bottom of the window: SKIP RECEPTIONIST/HOLD MSG! Use Help Button to submit Questions and Requests Faster!!
- This is a reminder that you can go into the software and use the Help command to submit questions and requests to the Customer Care department.

Customization Enhancements

Screen Builder > Examination > New Functionality for Speed Buttons

- You now have the option of adding Hover History PopUp to Speed Buttons.
- Add your button to the screen.
- In the Object Inspector, go to the NEW HoverFields window and enter the names of the fields that you would like to display in the Hover History PopUp window; fields need to be separated by a comma.

Data Mining Enhancements

Criteria > Enhancement Made to Existing Compulink-owned Criteria

- Data Mining Criteria 'Tomorrow's Appointment Patients' was renamed to 'Patients with Appointments Tomorrow'.

Worklist > New Feature: Auto Refresh

- When creating a Worklist, there is a new feature called: Worklist Auto Refresh.
- If this field is set to 'Y', [Auto Refresh] will DEFAULT and display in the header of the Worklist window.
- After a patient has been 'worked', when you double click on the next patient on the Worklist to move to their account, the Worklist will automatically refresh and the 'worked' patient will fall off of the list.
- If the 'Worklist Auto Refresh' field is NOT set to 'Y', then the [Auto Refresh] will not DEFAULT,

Data Mining Enhancements

and you would have to manually click the 'Auto Refresh' command on the Worklist window to turn this feature on for your Worklist. Click 'Auto Refresh' again to turn it off.

Examination Enhancements

General > Editing Sub-Table Records

- The Main exam record no longer needs to be in edit mode to edit Sub-table records.
- When you click on an icon on the Sub-table grid, it will no longer put the entire Main exam in edit mode, it will only focus on the action that you have selected for the grid.
- This new functionality also works with Encounter Favorites. If it is set up to populate a Sub-table record, it will populate the record without the Main exam being in edit mode.

General > Icons Now Grayed Out On New Patient Exam

- When entering the Exam for the first time on a new patient, the Images, Search and Delete icons will now be grayed out.

General > Medline Plus Interface Enhanced

- The Info icon can be found on the exam screen panels for Diagnosis, Medications and Tests.
- This is configured for quick access to the Medline Plus database to provide educational resources to your patients.
- The interface will now review the patient's age, sex and language to help deliver the most accurate information.

Layouts > Enhancement Made to Existing Compulink-Owned Layout

- The following is for ALL Advantage products:
- PopUp Layouts
    - The following change was made to ALL PopUp layouts, so it will be reflected on ALL tabs that access PopUps.
    - When the layout opens, the cursor will now default to the first field in the assigned tab order. (Client Request)

Layouts > New Layouts Added

- The following are for Psych Advantage ONLY:
- HiRes 1 Tab Session Note
    - This layout contains the following tabs: HiResSess Note and Images/Doc.
    - It has all the benefits of the 1 tab Session Note in a HiRes layout format with the MHConcise buttons.

- HiRes MHConcise
    - This layout contains the following tabs: HiResMedicationMH, Therapy Ment Stat and HiResPlanImages.
    - It contains the same information as the MHConcise layout, just condensed to 3 tabs.

OpenOffice Documents > Enhancement Made to Existing Compulink-Owned Documents

- The following are for Psych Advantage ONLY:
- Safety Information > Homicide section: The document will now print 'Denies' in front of the description when a patient indicates a Negative response. (Client Request)
- This change was made to the following documents: ExamComplete, ExamCompleteCurrent, ExamMHIntakeNarrative, ExamPsychEvaluationNarrative and ExamPsychFollowupNarrative.

OpenOffice Documents > Enhancements Made to Existing Compulink-Owned

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Examination Enhancements

Documents

- The following are for ALL Advantage products:
- ExamPositive and ExamPositive2Column document – The Health History section was updated to only print positive items. (Client Request)

OpenOffice Documents > New Document Added

- The following NEW OpenOffice document was added to ALL Advantage products:
- ExamCommunication
  - This NEW document will merge all of the data from ALL of the Communication records entered for the active patient. (Client Request)

Print Command > Enhancements Made to Existing Options

- 'Letter to Portal' was changed to 'Send Letter to Patient Portal' and moved to the bottom of the list.

- 'Letter to Referral via Direct' and 'Letter to Referral via Fax' were combined into 'Send Letter to Referral/Contact' and placed at the bottom of the list.
  - If the Referral Source has a Direct E-Mail address, the letter will automatically be sent via the E-Mail, if not, it will be sent via fax.

- The NEW combined option of 'Send Letter to Referral/Contact' will allow you to make changes to the letter prior to transmitting it. (Client Request)
- It also allows you to select multiple Referral Sources to send the same letter to. (Client Request)
  - Click the Print command and select 'Send Letter to Referral/Contact'.
  - Select the letter that you would like to send.
  - A 'Select Destinations' window opens; check the Referral Sources that you would like to send the letter to and click OK.
  - The OpenOffice document will open and merge the information for the first Referral Source.
  - Make any needed changes and click Save.
  - Once you save your changes, or if no changes are needed, click the X.
  - Follow the same steps for all other documents that merge for the rest of the Referral Sources.

Tabs > Enhancement Made to Existing Compulink-Owned Tab

- The following is for ALL Advantage products:
- All tabs that contain the Allergies panel.
  - An E-Rx column was added to the grid.
  - When an Allergy is added, the field will display a Y/N based upon the Screening ID.
  - This will determine if this record will be included when the Drug Allergy check is run when a medication is prescribed using AdvantageERx.

- PopUpCommunication
  - A new URL field was added to allow you to type or copy and paste an Internet address.
  - Information may also be populated when importing CCD or CDA files.
  - This field will also display on the Communication tab once the record is saved.
  - Double click the URL to launch your Internet browser and go to the designated website.

Tabs > Enhancements Made to Existing Compulink-Owned Tabs

- The following are for Psych Advantage ONLY:

Examination Enhancements

- ALL Assessment tabs
    - The following change was made on ALL Assessment tabs.
    - The Tool icon for calculation was replaced with the Calculator icon.

- Mental Status, Mentalstat (tablet) and HiResPEMHS
    - Mental Health Assessment panel
        - A new eraser button was added. When clicked, it will clear all fields under the Mental Health Assessment section only. (Client Request)
        - Hover History was added to every field label.

- PopUpDocumentsImages
    - The following change was made to the PopUp tab, so it will be reflected on ALL tabs that access the Images.
    - An 'Image' label was added to clarify which field to scan/import an image into. (Client Request)

- PopUpMedication
    - The following change was made to the PopUp tab, so it will be reflected on ALL tabs that access the Medication.
    - The 'Use 2nd DEA on Printed Rx' check box was added.
    - This field is required to be checked if the prescriber is printing the prescription from the software, and the medication is one that requires the 2nd DEA number to be printed on the prescription.
    - The Crystal Report attached to the Prescription button was also updated to include the 2nd DEA number, but will ONLY print if this new field has been checked.

- Psych Hx
    - Trauma/Abuse Hx panel - Using the GridEdit button, 'Denies history of trauma/abuse' was added to the top of the list. (Client Request)

- Service Plan
    - A new printer icon 'Print Individual Service Plan' was added to the title bar. When clicked, it will merge the OpenOffice document 'ExamIndividualServicePlan'.
    - Upon closing this version, a PDF version will present, allowing the Provider to sign it.

Web Registration > Mapping Added for PFSHLegacy tables

- The following fields were updated to map back into the patient exam:
    - Psychiatric History section – attention deficit hyperactivity (ADHD)
    - Family History section – ADHD, Bipolar, OCD and Schizophrenia/Psychotic disorders.
- Existing Web Registration users need to contact Customer Care for assistance in setup.

Worklist Command > Enhancement Made to Existing Compulink-Owned Worklists

- The following Enhancement was made to the Unsent CCD's ready to send Worklist:
    - The Worklist will now only display patients that have an exam signed off by the Provider, not just signed off by any staff member. (Client Request)

Worklist Command > New Worklist Added

- A NEW 'Drill Down' Worklist was added.
- Client Assessments
    - This Worklist gives a list of any Assessment that has been completed on a patient record that is one of the Assessments in the base product.
    - You will be prompted to enter a Start Date and End Date of when the Assessment was added.

Examination Enhancements

- The parent Worklist displays the Acct#, Patient Name and Count (number of completed Assessments).
- When you double click on a patient, a child Worklist will be called that will drill down and display the detailed list of Date, Assessment Name and Score.

Function Enhancements

Insurance Activities > Billing > Display and Output Changes

- The 'Form' and 'EMC' fields were combined, and will display the appropriate list based upon what is selected for the Output.
- Output Options:
    - None – You may select a Form.
    - List – You may select a Form.
    - Paper Claims – You may select a Form.
    - EMC Claim File – You may select an EMC Destination Code.
    - Claim Edit Errors Only – No options for selection.

Insurance Activities > Billing > Location Group Functionality Added

- The 'Loc' Option has been replaced with the 'Loc Group' Option, so you may now run your billing using the Location Group functionality.

Insurance Activities > Billing > Update to Paper Claims Output

- When you select an Output of 'Paper Claims', choose the Form and check the 'Paper Only' box, the function will now ONLY pull patients with an empty 'EMC Dest. Code' field on their Insurance screen. (Client Request)

Help Enhancements

Help Menu > New Option Added

- The following NEW option was added: MACRA QPP Success Center
- This will take you to Compulink's Webpage that will give you guidance about the MACRA final rule.
- You will find information about the basics of MACRA, our upcoming presentations, fact sheets and more about the QPP, MIPS and APMs.
- Before you call Customer Care with questions on MACRA, please be sure to review these valuable resources.

Ledger Enhancements

Print Command > Enhancements Made to Existing Compulink-Owned Statements

- The following Enhancements were made to 'LedgerStatement_cvv_new' and 'LedgerStatement_cvv_old':
    - Credit Card options were added for AMEX and Discover. (Client Request)
    - A line was added for including the card's CVV number for easier processing. (Client Request)

Look-up Table Enhancements

.Multiple Tables > New Filter Options and Display

- Throughout many tables, you will now have the option to Filter by Compulink Owned or User

Look-up Table Enhancements

Owned records.
- With ANY Filter options chosen, the current Filter Status will now display in the header at the top of the table.

.Multiple Tables > New Search Options

- The Search command has been updated to allow you to select specific CHARACTER fields to search by. (Client Request)
- Select the field in the table to search by, then enter the characters to search for.
- The software will look for a match anywhere in the selected field. (Client Request)
- If you had selected any Filter options prior to your Search, these will be recognized when the results are returned. Example: only User Owned records that match the specified characters.
- This option has been updated wherever you see the Search command in tables throughout the entire software, including the Login IDs table and Smart Function Editor. (Client Request)

EHR > Allergy > Description Table

- The Search command was added to the table. (Client Request)
- With the NEW Search option, you can now search by several character fields within the table.

EHR > Encounter Favorites Table

- You now have the ability to add Detail Records to Compulink Owned Subgroups.

EHR > Image > Icons Table

- A NEW field 'Display Name' was added.
  - Default is 'Y'.
  - If set to 'Y', the Name of the Icon will display in the Visual Documentation Engine in the patient exam.
  - If set to 'N', the Name will no longer display with the icon.

EHR > Medication > Pharmacy Table

- The Search command was added to the table. (Client Request)
- With the NEW Search option, you can now search by several character fields within the table.

EHR > Orders > Definition Table

- The following Order was added to the table: Referral to protective services.

EHR > Test > Name Table

- The following Assessment was added to the table: Elder Abuse Suspicion Index (EASI)

EHR > Treatment > Name Table

- The Search command was added to the table. (Client Request)
- With the NEW Search option, you can now search by several character fields within the table.

Financial > Payor > Names Table

- The order of the data entry fields has been updated, as well as the order in which the fields display across the screen. (Client Request)

General > Cities Table

- The Cities table was REMOVED from the software and replaced with an internal USCITY table.
- This table contains all Cities, States and Zip Codes, and therefor, clients are no longer

Look-up Table Enhancements

required to build their own table.
- Information will be accessed from the 'City' field on the patient demographic screen.
- Enter the first few characters of the City, then click the drop-down arrow to open the table.

General > Location > Details Table

- A NEW field 'ASC' was added for identifying Ambulatory Surgery Center Locations.
- If you are logged into Advantage with a Location that is flagged as an ASC, when adding a surgical procedure to the patient exam, the Surgeon field will display the Provider table, rather than the usual Referral Source table. (Client Request)

General > Provider Table

- The Crystal Report that prints from the table now includes the 3 Language fields.

General > Referral > Sources Table

- The Crystal Report that prints from the table, will now print in the order that is defined in the Display Order field. (Client Request)

Patient Area Enhancements

E-Rx Command > Command Does NOT Display for AdvantageERx Users

- The E-Rx Command on the Patient screen is only used for the NewCrop interface, and will NOT display for clients using AdvantageERx for E-Prescribing.
- If records are entered in the Provider table under the E-Rx area, the command will no longer display on the Patient screen.

OpenOffice Documents > Enhancements Made to Existing Compulink-Owned Documents

- The following are for ALL Advantage products:
- ABN and ABNSign
    - The expiration date was updated to 03/2020. (Client Request)

- DemographicReview
    - This document has been retired/discontinued by Compulink.
    - If you print it, a message will display letting you know it has been retired, and suggesting that you use the PatientRegistration document in its place.
    - If you would like to keep a User-owned copy of the document for future use, follow these steps:
        - From the patient screen, click on Letters; this will launch OpenOffice.
        - Click the Open icon.
        - Scroll down and double click on DemographicReview.cbsodt
        - Left click on the panel that contains the retired message and delete it.
        - Click on File and choose Save As.
        - When the window opens, the File name will be: DemographicReview.odt
        - The odt format is the User-owned format, click Save.

- PatientHealthHistory
    - The document was updated so it may now be printed from a NEW patient that does not yet contain an exam record.
    - Some offices prefer to have the patient fill out the information on paper, and then enter it into the computer when they are finished.

- PatientRegistration

Patient Area Enhancements

- The following fields were added to the document:
- Patient Information area: Nickname, Mother's Maiden Name, Gender Identity, Gender Identity Notes (if Other is selected), Sexual Orientation, Sexual Orientation Notes (if Other is selected), Race 2 and Ethnicity 2.
- Responsible Party Information area: Acct Resp Gender.
- Emergency Contacts and Other Contacts area: Release of Medical Information.

Tabs > Enhancement Made to Existing Compulink-Owned Tab

- The following change was made to the Patient tab:
  - Insurance panel – Policy # will now display in the grid. (Client Request)

Tabs > Enhancement Made to Existing Compulink-Owned Tab

- The following are for ALL Advantage products:
- PopUpDemographics
  - The following new fields were added: Gender ID, Gender ID Note (if Other is chosen), Orientation (Sexual), Orientation Note (if Other is chosen) and Ethnicity 2.

Tabs > New Tab Added

- The following NEW tab was added to ALL Advantage products:
- Patient (HiRes)
  - This tab will 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.

Tracking Command > New Scrollbars

- The Patient Tracking window will now display vertical and horizontal scrollbars if there is too much data to view in the standard window. (Client Request)

Worklist Command > New Worklists Added

- The following are for Psych Advantage ONLY:
- Two NEW 'Drill Down' Worklists were added to work with Group Scheduling.
- Attended Groups
  - This is a list of the Groups that have been run from a specified date range; date must be entered as mm/dd/yyyy.
  - The parent Worklist displays the Group Name, Start Time and Count (number of attendees).
  - Double click on a Group and a child Worklist will be called that will drill down to the Group Detail.
  - Information displayed includes the Account #, Patient Name and Attendance Date.

Patient Area Enhancements

- Groups attended (Individual count)
    - This is a list of patients that have attended a Group during a specified date range; date must be entered as mm/dd/yyyy.
    - The parent Worklist displays the Account #, Client (Patient Name) and the Count (number of Groups attended).
    - Double click on a patient and a child Worklist will be called that will drill down to the Groups Attended (Individual Detail).
    - Information displayed includes the Group Name, Attendance Date, Start and End Time.

Worklist Command > New Worklists Added

- The following NEW Worklists were added to ALL Advantage products:
- 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 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.

Report Enhancements

All Reporting Areas > New Functionality Added

- The Location Group functionality is being introduced to reports starting in Version 11.1.
- Setting Group Options in Reports
    - Reports that offer Location Group options default to '*' for All.

Report Enhancements

- Choosing a Location Group.
    - Double click in the Location Group 'Value' field to choose a specific Group or to reset to ALL Locations.
    - You can also type a wild-card into the 'Value' field to run the report for multiple Groups by a common value.
    - The wild-card text is NOT case sensitive. For example:
        - There are two Location Groups, Western Region and Southwest Region, where the common value is 'west'.
        - Enter a Location Group of *west* Result: The report includes data from both groups.
        - Enter a Location Group of *WEST* Result: The report includes data from both groups.

Appointment > Daily > Enhancement Made to Existing Report

- Missing Charges
    - The Parameter/Option 'Match on ID, Dept & Loc?' will now default to 'False'. (Client Request)

Electronic Health Record > MEANINGFUL USE > New Report Added

- The following NEW report was added: MIPS Score and ACI Summary 2017
- This report presents a graphical view at a glance of the Advancing Care Information (ACI) Measures component of MIPS.
- Prior to running this report, you MUST generate reporting data for the clinician.
    - Set the Provider record: Meaningful Use Year = 2015 (not 2017) and MU Stage = 2 under Utility > Look-up Tables > General > Provider.
    - Populate the report data. There are two methods:
        - Use the Exam > M.U. > MU Dashboard command.
        - Use the Quality Reporting and Meaningful Use > Populate Report Data utility.
- Options/Parameters for running the report include the following:
    - Provider ID
    - Reporting Period Begins on/after and Ends on/before dates
    - Populate Data Threshold
    - Threshold Hour Start/End
    - Show Measure Description?
    - Will attest Security Risk Analysis?
    - Will Attest CEHRT for IA? (Improvement Activities)
    - Will attest Specialty Registry?
    - Will attest Immunization Registry?
    - Enter your QM MIPS %
- Select your Options and click Begin.
- This report summarizes ACI, Advancing Care Information Measures, part of MIPS, based on EHR data and your selections on the report options.
- ACI includes Base, performance and bonus categories for the measures and their percentages.
- ESTIMATED COMPOSITE MIPS percentage is shown based on the ACI percentage plus your selections on the report options.
- On the last page, you'll find more information on how to populate the report, as well as report options and detail.
- See the Compulink Help file for detailed information on this new report.

Financial > Acct Management > Enhancements Made to Existing Reports

- Ins. Receivables by Carrier
    - The summaries are now able to display the negative Insurance balances if they are present in the patient's ledger. (Client Request)

Report Enhancements

- Ins. Receivables by Payor
    - The Parameter of LOCATION (Svc Loc) was replaced with the NEW Parameter LOCATION GROUP (Svc Loc).
    - The NEW Parameter/Option 'Exclude Payor (name)' was added. (Client Request)
        - Type in a Payor name that you would like to EXCLUDE from the report.
        - You may also use * for wild-cards. Example: Medi* would exclude all Payors that start with Medi (like Medicare and Medicaid).
    - The summaries are now able to display the negative Insurance balances if they are present in the patient's ledger. (Client Request)

Financial > Acct Management > New Report Added

- The following NEW report was added: Accounts Receivable All
- Eventually this new report will replace the legacy 'Accounts Receivable' report.
- Options/Parameters for running the report include the following:
    - Location Group (Svc Loc) (Client Request)
    - Location (Service Loc)
    - ID (Provider)
    - Department
    - A/R Date - Threshold
    - Financial Plan (Patient)
    - Minimum Days Old – No limit on this (Client Request)
    - Show Detail? - True/False
    - Minimum/Maximum Account Balance (Client Request)
    - Accounts on Collection ONLY? - True/False
    - Group By Age? - True/False
    - Responsible Only View? - True/False
- 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. (Client Request)
- Select your Options and click Begin.
- The report begins with several A/R summaries.
- The accounts are then listed, grouped by patient demographic Location, optionally by Age and with optional levels of detail.
- The Age option will display balances Over a Year old (this is not available on the legacy report). (Client Request)
- If 'Show Expanded Detail' is set to True, the report will display if there is a Statement Hold on the Ledger. (Client Request)
- On the last page, you'll find more information on how to populate the report, as well as report options and detail.

Financial > Analysis > Enhancements Made to Existing Reports

- Audit Trail
    - The NEW Parameter/Option 'BILLID (Patient Acct. #)' was added. (Client Request)
    - This will allow you to run the Audit Trail and print it for an individual patient account.

- Insurance Adjustments
    - The NEW Parameters/Options 'Minimum Adj. Amount' and 'Maximum Adj. Amount' were added. (Client Request)
    - These will allow you to set a range of Adjustments if desired.

- Office Production w/Inline Adjust
    - The Parameter of LOC (Service Location) was replaced with the NEW Parameter

Report Enhancements
Location Group (Service Loc). (Client Request)

Recall > Enhancement Made to Existing Report

• Non-Updated Recall
  • The NEW Parameter/Option 'Exclude Closed Accounts?' was added. (Client Request)
  • When set to 'True', any accounts with closed Ledgers will NOT be included in the report.

Referral > General > New Report Added

• The following NEW report was added: Referrals Label
• This report allows you to print labels for ALL entries in the Referral Sources table. (Client Request)
• Enter the number of Columns on your labels and click Begin.
• When the Crystal Report window opens, verify that your labels are in your printer and click the printer icon.

System Admin > Enhancement Made to Existing Report

• Security Admin. Log
  • The NEW Parameter/Option to sort the report by (T)ime (U)ser (E)vent was added.
  • A NEW section for 'Security Profile Rights Update' will now display at the bottom of the report, regardless of the Parameters that are chosen.

System Admin > New Report Added

• The following NEW report was added: PracticeWatch Task History
• This report shows Tasks in PracticeWatch if they started within the date range of the report.
• Options/Parameters for running the report include the following:
  • Start Date (Task Start)
  • End Date
• Select your Options and click Begin.
• Tasks are listed by Task Name, then by Start Date/Time.

Utility Enhancements

Health Care Maintenance Rules/Orders > Resources > Item

• The following NEW Resource Items were added:
  • Counseling: Children Weight Management
  • Counseling: Children Weight Management (Spanish)

• Losing Weight and Losing Weight (Spanish) were changed to Counseling: Losing Weight and Counseling: Losing Weight (Spanish).

PracticeWatch Setup > E-Mail Task Important Tip

• If you are using the E-Mail task for Patient Messaging, you will select an SQL Query to generate the list of patients who will be emailed.
• For a Query to be used for this task, the Select statement in the SQL script MUST include the patient E-mail field.
• This data element is used to populate the 'To' field in the E-mail operation.
• Queries that will ONLY be generated via the PracticeWatch service can use the expression Select * from Patient. This guarantees that all of the patient fields are available.
• Using Select * (All) for any large database (Patient, Appointment, Exam) is not recommended for Queries that will be run during normal business hours. This can greatly affect your software performance.

Utility Enhancements
• As an alternative, the Select statement should list PATIENT.EMAIL, along with any other individual patient fields that will be used by the Query.

PracticeWatch Setup > New Task Added

- A NEW Task called 'Function' was added, and the following Functions are now available:
- ERX Eligibility Checking
    - This Task should be used ONLY in conjunction with AdvantageERx, NOT NewCrop.
    - The suggested schedule is to run daily, every 30 minutes.
    - The Task will look for patients with appointments in the next 24 hours; if an appointment is found, the software will check for pharmacy eligibility benefits, and if the patient is eligible, it will also check the Erx history.
    - Eligibility checks can only be performed once in a 72 hour period.

- ERX Send & Download
    - This Task should be used ONLY in conjunction with AdvantageERx, NOT NewCrop.
    - The suggested schedule is to run daily, every 30 minutes.
    - This Task will post queued messages from the Advantage software to the CBS ERX Hub.
    - It will also pull any messages back down from the Hub for the Providers that are registered at that particular location.

- Populate Quality Report Data
    - Use this automated Function rather than manually populating it via Utility > Quality Reporting and MeaningFul Use > Populate Report Data.
    - Enter the ID of the Provider that you want to Populate the Report for.
    - Use Report Parameters for the StartDate and EndDate. Examples of Parameters can be found in the Advantage Help file.
    - Set Attestation to True if you need to generate XML data for reporting eCQMs.
    - Attestation can be left as False to build data for running the ACI Patient List and other MIPS/MU related reports.

System Administrator > Login > IDs > New Field Added

- The NEW field 'Prompt for OrderSet after Diagnosis Add' was created.
- The default is 'Y' for Yes.
- If set to 'Y', it will prompt the selection of Order Sets after adding a Diagnosis either in the PopUp, or using an Encounter Favorite.
- Previous versions would always prompt, with the added field, you have the option of turning this prompt off.

New Features & Enhancements for Previous Version Builds:

11.0.9 (4/18/2017)

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)

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