What's New in Version 11.0.5.1 for Psych Advantage (rev 04/16/2015)

GENERAL

CBSMail:

- Compulink's CBSMail program has been RETIRED.
- Version 11 software enhancements have eliminated the need for CBSMail.
    - Your Advantage Configuration file is automatically downloaded approximately every 2 weeks.
    - Your System Administrator has the ability to download the latest version of Advantage and update your Configuration on-demand at any time.
    - Upon launch of version 11.0.5.1, the contents of the CBSMail folder will be removed.
- The CBSMail Access right has also been removed from the Login Profile list.

Configuration File Download:

- When your System Manager is downloading an on-demand Configuration file [Utility > System Administrator > Update Configuration] you will now receive the following message: 'Press YES to confirm ALL 3rd party applications accessing Advantage Data Dictionary have been STOPPED prior to Updating Client Configuration File!'. This step ensures that there is no interruption of processes associated with these applications.

System Setup:

- The check box "Allow Automatic Config Updates" was added to the System Administrator tab under the System Setup.
- This option defaults to true, but can be disabled if you have an anti-virus software or another application that is connected to the Advantage software (like an API) that you have to disable prior to downloading a new configuration file.
- By toggling this option off (unchecked), you will have to manually download the configuration file each quarter from [Utility > System Administrator > Update Configuration].

APPOINTMENTS

General Enhancements:

- Defaulting phone numbers.
    - When booking an appointment, the software will now default the cell phone number into the remarks field.
    - If the patient has a cell number, that will display first, followed by the home number.
    - If there is no cell number, then the home number will display first, followed by the work number.
- Warning message for closed accounts.
    - If the patient's ledger is marked as "Closed", you will receive the following message when trying to book and save an appointment: "Account is CLOSED! Unable to proceed with booking of Appointment!"
- Editing the patient name at the appointment scheduler after booking the appointment.
    - When adding a new appointment, you can type in the patient name field. This will allow you to search for another patient to schedule for.
    - Once you save the appointment, you are no longer allowed into the name field. If you were to edit the appointment, the name field will be grayed out.
    - This will prevent the staff from overwriting the name on the original appointment and accidently replacing them with another patient.
- Patient Name refresh.
    - After adding an appointment, the name field is grayed out. If a change is made to the patient name on the demographics, the name field on the appointment will automatically be refreshed whenever it is touched.

- Example:
  - Appointment scheduled for Alexander Rogers.
  - Patient comes in and asks that the name on the demographics be changed to Alex.
  - When the staff edits the appointment to change the status to kept, it will automatically update the name field to Alex.

New Enhanced scheduler:

The new scheduler is in beta as of Version 11.0.5.1 and available for you to test drive. The current scheduler will be retired in early 2016.

- To preview, right click on the status bar at the bottom of your screen and select "Turn Enhanced Appt Scheduler On/Off."
- Once every 3 weeks, you will receive a reminder about the retirement of the Standard scheduler, and the availability of the new Enhanced scheduler.
- Upon exit of the software, the software remembers if you were using the Standard or Enhanced scheduler, and will load the same one the next time you launch the software.

- Look for these new features:
  - Customize the columns of data displayed in the schedule, and display the results in Normal, Compact, Squeezed or Custom modes.
  - Use Drag and Drop to move an individual appointment or block to another time on this or another provider's schedule.
  - The Resource tool lets you view the Daily Detail screen for your choice of providers and resources at one time.
  - The View tool lets you save layouts that you created with the Customize and Resource tools, so you can quickly load and view them at any time.
  - The new Right Click menu is a quick way to book, move appointments to another day, move appointments to the Waiting List, reschedule and more.
  - Scheduling Multiple appointments now allows you to individually select specific days, times, and providers; you are not locked in to the same time and provider.
  - The current Appointment scheduler functionality is scheduled for discontinuation in early 2016.

- Waiting List in new Enhanced scheduler.
  - When viewing the Waiting List, the Added Date will now display.
  - This is the date that the patient was added to the Waiting List.
- Appointment Status > Color Options [Utility > Look-up Tables > General > Appointment>Status]
  - A new "Color" field was added to this table. If a color is assigned to a status, this will overwrite any color that may be assigned in the Appointment Types table.
  - This will only be seen in the new Enhanced appointment scheduler.
  - Example:
    - Appointment type "Follow-up" is assigned a color of yellow.
    - Appointment status "K" for Kept is assigned a color of light green.
    - When the appointment is Booked, it will display in yellow.
    - When the staff marks it as Kept, it will display in light green.

LEDGER

- **Ledger > View > Line Item Sort > Print:**
  - You no longer have to select the date in the report window.
  - Once you select the date range to view the information, if you choose to print, it will pass that same date range to the Crystal Report.

MEDICAL RECORDS

- **Live Video capture now available:**
    - Two new options were added to the menu when you click in an exam image field.
        - Capture Live Image allows you to capture a picture directly from the camera.
        - Capture Live Video allows you to record and save a video from the camera.
    - The first time you access these options, you will be prompted to select your camera and save your setting.
    - The files are automatically imported and saved in the application.
    - You must have a video and audio capture device like a webcam and Windows Media Player installed for this to work.

- **Exam > Delete:**
    - The Examunique number will now write to the PHIAudit Table when an Exam is deleted.
    - This will also appear on the PHI Audit Event Log Report.

- **Enhanced SelectEncounterFavorite Smart Function:**
    - Smart Scripts used to display the list of Encounter Favorites for a specific exam Tab just got smarter.
    - In the Encounter Favorites table (Utility > Look-up Tables > EHR > Encounter Favorites) each Favorite record is assigned to a specific Tab. This is what filters the Favorites list for that specific Tab in the medical record.
    - You can now filter the list even further by using '%' with the Name passed in the SQL script to display Encounter Favorites with names that are "LIKE" your entry.
        - The syntax %Name% will locate a match anywhere in the Encounter Favorite Name.
        - The syntax %Name will locate a match at the end of the Name.
    - For example, the following script would filter Favorites for the Complaint tab to show entries that contain 'Depression' in the Name.
        - begin
        - SF.SelectEncounterFavorite('%Depression%');
        - end;
    - Look for the purple star icon in Compulink-owned Tabs or right click on the Tab Name to open the Encounter Favorites selection list.

PATIENT

Alert Messages:

- The Alert Message window has been redesigned to make the messages easier to read.
- The character font is larger and bold.
- Added, Expired Dates and ID have been removed from the display.
- You can still see this detail when you click on the ALERT command on the patient menu.

PATIENT TRACKING

Tracking Icon

-  This new icon was added to the header of the Today's Appointment grid on the patient demographics screen.
    - With one click, the user can mark the highlighted appointment as Kept, and create the patient tracking stops (ARRIVE) if they exist for the scheduled appointment reason.
    - When the Confirm window opens, select YES to arrive the patient and create office tracking stops.
    - If you are not using the Tracking feature, clicking the icon will mark the appointment status as 'Kept'.

REPORTS

New Beta Report:

- The new BETA A-R by Accounts report is avaialble for your review and feedback.
- [Report > Financial > Acct Management>~BETA A-R by Accounts.]
    - Optional detailed aging of Insurance, Responsible AND Total Balance per Account.
    - Backdates all these balances and aging. Runs faster when backdated.
    - Charts for overall aging, Materials aging, Service aging, Location aging.
    - Runs by Service Location, then optionally by Age or by Account.

TABLES:

- **Appointment Status > Color Options** [Utility > Look-up Tables > General > Appointment>Status]
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