



Psych Advantage

Version 12.3 Initial Release Notes

(Initial Release Date - 6/30/2020)
Document Revised (12/2/2020)

Click the link below to go to the Education page of the Compulink Client Website. This is information central for the Advantage Software eLearning Portal. The 'What's New in CU' tab offers links to courses for the CURRENT Advantage Software version on distribution. For lists of features and enhancements for PREVIOUS version builds, go to the 'Previous Versions' tab. Here you will find a list of links with version numbers and release dates.

[What's New in CU for Psych](#)

X Items marked with a red 'X' are things that Compulink deems important for you to know PRIOR to updating your software to the version listed above.

The date in red to the left of the Enhancement, indicates the date the item was added to or updated on this document.

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

Service Pack Enhancements: [Click here](#) for a list of Service Pack Enhancements released with incremental updates (0.5, 0.6) between version steps (e.g. V11 to V12).

The topics in the *Table of Contents* contain links; click a topic to jump to that spot in the document. Some of the topics are generic, and may not contain enhancements at current time of publication. If you would like to come back to the Table of Contents, click on the **red** page number at the bottom right of the page.

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Hot Topics

(5/15/2020) Exam > HOT TOPIC(S)

- Exam > Telehealth is a NEW section added to this documentation.
- Please review ALL of the topics in this new section.

Customization

(5/12/2020) GUI Customization > Assign Custom GUI to User

- After assigning the custom GUI, it is no longer a requirement to completely close out of the Advantage software, you simply need to exit the GUI Customize area and wait a few seconds for the change to take effect.

(5/13/2020) GUI Customization > Individual Icon Colors

- Users now have the option to change the colors of individual icons. (Request)
- Changing the color:
 - Go to the Patient Demographics and right click on an icon in the command menu.
 - A Color pallet window will open for you to select the color for the icon; left click on a color, then click 'OK'.
 - The new color will appear on the icon within 1-2 seconds.
 - To put the color back to the original, right click to open the pallet again, and select the white box in the bottom right corner.
 - To reset ALL icon colors back to the Default color, use the NEW feature 'Update > Reset Icon Colors'. For full details, see the topic: GUI Customization > Update > Reset Icon Colors.
- This will change the icon color for ALL USERS that are connected to the same customized GUI that they are connected to when they make the change.
- To control the users that have the right to make this change for customized GUIs that may be attached to multiple staff members, a NEW Login Right has been created.
 - The NEW right 'Group GUI Access' was added.
 - If set to 'None', the user will NOT be allowed to change an icon color when connected to a customized GUI that is attached to multiple staff members.

(5/12/2020) GUI Customization > Update > All > Option Display Change

- The 'Update > All' option is only available to users with System Administrator Login Rights set to Full (displays grayed out if set to 'None').

Customization

- Starting with Version 12.3, this option will no longer be visible on the list at all for users with Rights set to 'None'.

(5/13/2020) GUI Customization > Update > Reset Icon Colors > NEW Option

- The NEW option 'Reset Icon Colors' was added.
- Under the topic 'GUI Customization > Individual Icon Colors', it explains how a user can change the color of an individual icon, and then change it back to the default.
- If the color has been changed on several icons, and you need to change them ALL back to the default at the same time, use this NEW option.
- Resetting the icon colors
 - Highlight the custom GUI that you want to reset icon colors for.
 - Click 'Update > Reset Icon Colors'.
 - Click 'Yes' on the message: Select Yes to Confirm Remove Custom Icon Colors!
 - Exit the GUI Customize area and wait a few seconds for the change to take effect.
- If this customized GUI is attached to multiple staff members, the person logged in must have the Login Right 'Group GUI Access' set to 'Full' to Update.

(6/3/2020) Printer & Output Tools > Workstation Configuration > Screen Display Scale %

- For users who want all items to display larger on the screen (including fonts), Compulink recommends that they do NOT make changes in GUI Customization, but change the 'Screen Display Scale %' for the entire workstation.

(6/3/2020) Screen Builder > ALL > Maximum Number of Tabs

- The number of tabs allowed per individual layout has been increased from 20 to 25.

(10/14/2020) Smart Function Editor > Exam > ADDED: SubTableUniqueRecordEdit

- PURPOSE:
 - Put sub-table record in edit mode. Used with SubTableUniqueRecordPost.
- DESCRIPTION:
 - Attach to a button or speed button label to open a sub-table PopUp.
- FUNCTION CODE:
 - procedure SubTableUniqueRecordEdit(ReqTable: string; ReqUnique: Integer);
- EXAMPLE: AlertStop

```
var
  buttonSelected : integer;
begin
  buttonSelected := MessageDlg('Do you want to expire this Alert
today?',mtConfirmation,
[mbYes,mbNo], 0);
  if buttonSelected = 6 then
  begin
    * SF.SubTableUniqueRecordEdit ('ExamAlrt',SF.GetTableUnique(sender,'Alert'));
    SF.AssignFieldDate('ExamAlrt', 'Expired', SF.TodaysDate );
    SF.SubTableUniqueRecordPost ('ExamAlrt');
  end;
end;
```

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end;
end;
```

Data Mining

- (7/13/2020) Exporting > Column Headers Export**
 - Column headers will now display when selecting to export to the option of 'Microsoft Excel 97-2000 - Data only (XLS)'.
- (7/13/2020) Exporting > Number of Columns Increased**
 - The number of columns of data that can be exported from a Data Mining Query and printing of a Worklist has been increased from 7 to 10. (Request)

Databases

- (6/8/2020) ExamMaterial > Field(s) ADDED**
 - The following field(s) were added to the ExamMaterial (Exam Material – Used for Retail/Inventory) database, and are available for user customization. They will also be added to Compulink-Owned screens in the near future.
 - QUANTITYRECOMMENDED – Will be used for entering a recommended quantity.
 - SIG – This is a Memo field for the Provider to enter the directions for use.
- (6/8/2020) ExamMed > Field(s) ADDED**
 - The following field was added to the ExamMed (Exam Medication) database, and is available for user customization. It will also be added to Compulink-Owned screens in the near future.
 - SKU – This will display the 'OTC Product UPC' from the Medication Name table.
- (7/17/2020) ExamTreatment > Field(s) ADDED**
 - The following field was added to the ExamTreatment (Exam Treatment) database, and is available for user customization. It will also be added to Compulink-Owned screens in the near future.
 - ORDERBYNAME – This will be used to document the staff member that ordered the Treatment. (Request)
 - The field defaults to the name of the person that is logged in when the Treatment

Databases

- is added, but it is connected to a Virtual table that will access the Login ID table.
- If adding this field to your own screens, select the TCBSDBComboBox.

EDI (Electronic Billing)

(7/20/2020) EMC > CBSIVANS Login Script

- WPS changed their security settings, so the CBSIVANS login script was changed to comply with the updated settings. (Request)

Exam

Exam > Commands

Exam > Command (Edit)

(6/11/2020) Command (Edit) > Record Locked By Other User

- Record locked message updated (Request)
 - When a user tries to edit an Exam that is locked open by another user, the message that they receive has been updated to the following:
'Editing limited to Exam sub-table records ONLY, as main Exam is in use by: AAA at Tracking Station: BBB
To edit the main Exam, the identified user must save/cancel out of editing!
 - The 'AAA' will display the Login Name, and the 'BBB' will display the Tracking Station Name, only if the office is using SMART Workflow.
- Record no longer goes into edit mode
 - When a user tries to edit an Exam that is locked open by another user, they will still receive the message letting them know that they are only allowed to add sub-table records.
 - After clicking past the message, the Exam will no longer go into edit mode with the 'Cancel' and 'Save' options; this was removed, since you are not allowed to modify the main Exam.
 - The user can still go to the grids and edit/add to the sub-table records, without the main exam being in edit mode.

Exam > Command (Search)

(7/22/2020) Command (Search) > Default Cursor to Field Last Used

- When searching for a patient, the cursor defaults to the 'Last, First' name field.
- If the 'Acct#' field is used, the next time the Search window is accessed, the cursor will default to the 'Acct#' field. (Request)

Exam > Command (Today)

(5/4/2020) Command (Today) > NEW Icon

- A NEW icon was added for the 'Today' (Today's Exam) command.

Exam > Layouts

Exam > Tabs

Exam > Tabs (ADDED)

- (7/13/2020) Tabs > ADDED: MedicationPsych**
 - This tab was created to identify ALL medications. (Request)
 - There is a single grid for all entries, and not separate grids for Psychiatric, Non-Psychiatric and Discontinued medications, as ERx will no longer differentiate Psychiatric medications from Non-Psychiatric medications.
 - The grid also includes the Pharmacy name and address. (Request)
 - There are TabAdd buttons at the top for the following:
 - Assessment Tools
 - Review of Systems
 - Health Hx
 - Addictions
 - There are also areas to document/view the following:
 - Reason Meds not Reviewed
 - Allergies
 - Alerts
- (6/3/2020) Tabs > ADDED: Tabs On-The-Fly**
 - The user may add tabs to the existing layout on-the-fly, however, there is a maximum number of tabs allowed per layout.
 - That maximum number has been increased from 20 to 25.

Exam > Tabs (DISCONTINUED)

- (5/22/2020) Tabs > DISCONTINUED: See Below**
 - The following tabs were marked as discontinued, as they are no longer used by Compulink:
 - Complaint Inpt
 - ComplaintInitial

Exam > Tabs (EDITED)

- (5/12/2020) Tabs > EDITED: ALL PopUp Tabs**
 - Save icon
 - The 'Save' icon was updated to match the 'Save' icon for the entire Exam record for better consistency.
 - Save/Add icon
 - The 'Save/Add' icon was updated to just display a + sign with a 'Save +' label under it for better usability.
-
- (7/17/2020) Tabs > EDITED: ALL Tabs with Medication Panel**
 - Medication panel – The ellipsis hover menu contains the option for 'Prescription'. When clicked, it will merge the Crystal Report Rx for the highlighted medication. (Request)
 - (11/2/2020) Tabs > EDITED: All PopUpSurgery Type Tabs**
 - Surgeon field - The drop-down will access a different table, depending upon if the 'Historical' field is checked or unchecked. (Request)
 - If checked, the drop-down will access the 'Referral Sources' table.

Exam > Tabs (EDITED)

- If unchecked, the drop-down will access the 'Provider' table.

(6/25/2020) Tabs > EDITED: All Tabs That Print the Medication Rx

- The following items were added to the Medication Rx that prints:
 - ROUTE (Request)
 - FORM (Request)
 - NPI (this will only print if the Provider does not have a DEA#) (Request)

(9/21/2020) Tabs > EDITED: All Tabs With Allergies Panel With Reviewed Today

- Grid ellipsis hover menu
 - Reviewed Today – The Smart Function attached was updated.
 - When clicked, it will simply write the record to the Audit, and no longer bring up the confirmation window; this will save the staff time and clicks.

(5/22/2020) Tabs > EDITED: Complaint and ComplaintMH

- Admissions information added:
 - Admission Date
 - Time
 - Admission Type
 - Admitting Details

(7/15/2020) Tabs > EDITED: HiResCompROS

- Psychiatric Medications, Non Psychiatric Medications and Discontinued Medications panels – These grids were removed, as ERx will no longer differentiate Psychiatric medications from Non-Psychiatric medications. (Request)
- Medications panel – This NEW grid was added to enter ALL medications. (Request)
 - This will allow the user to enter and download Non-Psychiatric current medications and mark them as 'Historical', and they will display with all of the other medications. (Request)

(7/13/2020) Tabs > EDITED: MedCheck

- Psychiatric Medications panel – The grid was removed, as ERx will no longer differentiate Psychiatric medications from Non-Psychiatric medications. (Request)

(6/11/2020) Tabs > EDITED: PopUpTreatment

- Order 'By' field
 - Field was changed from an ID field to a full Name field, with a name drop-down.

(5/22/2020) Tabs > EDITED: See Below

- The following tabs were edited:
 - Complaint
 - ComplaintMH
 - HiResCompMH
 - HiResCompROS
- NEW fields were added to document Virtual Visits.

Exam > Tabs (EDITED)

- For full details on the fields that need to be completed for Telehealth, see the topic: Exam > Telehealth > Exam > .Field(s) ADDED.
- The following tabs were edited, and only the new 'Virtual Services' field was added for non-MD Providers:
 - Session Note
 - HiResSess Note

Exam > Telehealth

X (5/15/2020) **About Telemedicine > What You Need to Know**

- Telemedicine and Informed Patient Consent
 - Getting your patient's verbal or written consent for a Telemedicine visit, could be a legal requirement in your state or territory, or a condition of getting paid, depending on the payor you're billing.
 - Please refer to your local legislation for current laws and reimbursement policies, prior to initiating contact.
- Telehealth Video Session – The Advantage Video Session feature allows the Provider to do a live video chat with a patient and document the encounter in EHR.
- CMS Security Requirements for HIPAA and Telemedicine
 - "Only authorized users should have access to ePHI for Telemedicine."
 - Only users with rights into a patient's exam can view or initiate a video session.
 - This is not specific to Telehealth but part of the Advantage core software security, configured in the user's Login Profile rights.
 - "The communication is secure."
 - Our Telehealth is in compliance with HIPAA and PHI is encrypted as specified in the HIPAA Security Rule.
 - Compulink uses a strong protocol (TLS 1.2), a strong key exchange (ECDHE_RSA with P-256) and a strong cipher (AES_128_GCM).
- Requirements for the Provider and Patient
 - A modern browser that supports the WebRCT Framework such as:
 - The latest versions of Chrome, Firefox, and Microsoft EDGE on Windows 7, 8, 10+, & Server (Note: Internet Explorer does NOT support WebRCT).
 - The latest version of Safari on MacOS 12.14+
 - The latest version of Chrome on Android 7+
 - (Effective with Advantage Version 12.3) The latest version of Safari on iOS and iPadOS 11+
 - Each computer will need a camera or webcam installed or connected.

X (7/20/2020) **Additional Topics > Other Areas of the Document**

- See the topic below in another area of the document for more Telehealth information:
 - Reports > Analysis > EDITED: Charge Collection Analysis

X (5/21/2020) **Additional Topics > Other Areas of the Document**

- See the topics below in other areas of the document for more Telehealth information:
 - Exam > Tabs > EDITED: See Below
 - Look-up Tables > Financial > Services > Telehealth Items ADDED

X (5/15/2020) **Exam > .Field(s) ADDED**

Exam > Telehealth

- Several NEW fields were added for posting Telehealth visits from the Exam to the Ledger.
- Field labels may vary slightly by product:
 - POS – Place of Service (Select Telehealth)
 - Virtual Visit Type or Virtual Services
 - Telemedicine: Audio + Video
 - E-Visit: Digital / Patient Portal
 - Phone Only: Unrelated to prior week/No 24hr E&M
 - Virtual Check-ins: Phone, Secure Text, Portal
 - Non-Physician Phone Call
 - Start or Start Time – Start time of the exam (military time).
 - Left click in the field to auto-populate it with the current time.
 - If the exam record is touched ANYWHERE by a user logged in as a Provider or Scribe, the field will auto-populate with the current time.
 - End or End Time – End time of the exam (military time).
 - Left click in the field to auto-populate it with the current time.
 - If the field is left blank, but the 'Virtual Visit Type' field is populated, upon saving of the record, the 'End' time will auto-populate with the current time; this occurs for users logged in as Providers or Scribes.
 - Total Time or Total Min – Total time of the exam in minutes (End – Start).
 - This field will automatically calculate when the 'End' field is populated by left clicking in the field.
 - It also calculates when saving the record if the users is logged in as a Provider or Scribe, and the 'Virtual Visit Type' field is populated.

X (5/15/2020) Exam > .Virtual Service Documentation

- Things to document and bill
 - Based on the visit type, you may be billing your normal codes, paying special attention to Place of Service or Modifier Codes required by the payor.
 - For Telephone, Virtual Check-Ins, and E-Visits, the time should be documented.
- Version 12.3
 - In Version 12.3, new fields have been added for documentation of the Telehealth services provided.
 - Depending on your Advantage product, these fields may be incorporated into the standard exam layouts or available in a Telehealth layout.
 - In either case, the new fields need to be completed to support the updated fee posting logic for automated posting to the patient's ledger.
- Version 12.2
 - You could use the 'Communications' layout or a custom Telehealth Session layout, should you decide to create one (see the Advantage Online Help File).
 - The Telehealth session time should be documented in the Communication Notes, along with any other pertinent information.
 - If billing your normal codes, you can select from the Office Codes and, if desired, right click in that field to add Telehealth services to the lookup table.
 - Telephone, Virtual Check-Ins, and E-Visits can be posted on the patient's Ledger.

X (4/17/2020) Exam > Command (Utility) > ADDED: Telehealth Install/download

- The 'Telehealth Video Download' was MOVED (and renamed) from the main screen Utility to the Exam Utility command for easier access.
- In the Exam, click 'Utility > Telehealth Install/download'.

X (5/6/2020) Exam > Command (Utility) > Video Session > New Software

- There is a NEW version of Telehealth software, and the user decides when to download it.
- In the patient Exam, click Utility > Video Session, and the following message will display if the new version needs to be downloaded: Error Establishing Telehealth Video

Exam > Telehealth

Connection: Missing CEFBROWSE: Please download and install CEFBROWSE. Select OK to Download latest Telehealth Version Now or CANCEL to download Later! (Request)

- Once the download is the complete, click 'OK' on the following message: Table Updates have Downloaded Successfully! Please exit Advantage Application and Re-Start to Update Tables!
- Upon restarting, a 'Compulink Telehealth Update' window will open and show the progression of the installation of the files.

Function

Function > Patient Recall

(6/25/2020) Patient Recall > Results Updated

- General results - The results were changed from being in Recall Unique order to Patient Last Name, Patient First Name order. (Request)
- Output List
 - Patient Cell Phone was added. (Request)
 - Every other row will be highlighted in color to help differentiate the data.
 - Zip Sorted – A header displaying the zip code will print, followed by all patients within that zip code. Patients will be in order of Last Name, First Name under the zip code. If there are patients with the same name, the one with the lower EHR# will print first.
- IMPORTANT – With the update to the results, it is important that the user remembers to check 'Update' at some point when running the Function (whatever they choose for their final output). If the patients are never updated, they will appear a second time when the Function is run for the next time period.

General

(5/12/2020) Display Changes > Darker Blue

- The Default Blue color was changed to a darker color to provide a better contrast with the white icons.

(6/2/2020) Display Changes > Jump Icon

- The icon for the 'Jump' command has been updated to a jumping person.

Inventory

(6/16/2020) Display Changes > Field(s) EDITED

- Mfg and Name fields
 - The width of the fields were expanded to display more information in the screen.

Ledger

Ledger > Commands

Ledger > Command (EHR Post)

(6/16/2020) Command (EHR Post) > Window Updated

- The 'EHR Automated Fee Posting' window opens when the 'EHR Post' command is selected.

Ledger > Command (EHR Post)

- The 'Save for Ledger Posting' button was removed from this window, as it is not needed at this point in the process.

Ledger > Command (Jump)

(6/16/2020) Command (Jump) > NEW Option: Comments

- The NEW option to Jump to 'Comments' was added.
 - When clicked, the view will change to the Demographics, and the Comments window will open.
 - Click 'Edit' to add information to the existing Comments.

Look-up Tables

Look-up Tables > EHR

(6/11/2020) EHR > Medication > Name > Field(s) ADDED

- OTC Product UPC – Enter the UPC code for over the counter items that the Provider will recommend for the patient.

Look-up Tables > Financial

(11/2/2020) Financial > NDC > Field(s) ADDED

- Bill Unit Factor – The number the 'Units' will be multiplied by when posting to the Ledger.
 - Default is '1'.
 - Example: If set to '2', and 'Units=5', when posting the NDC to the Ledger, the software will multiply the 'Units' (5) times the 'Bill Unit Factor' (2), and automatically enter 10 into the '#' or Units field.

(5/21/2020) Financial > Services > Item(s) ADDED

- The following items were added for NEW INSTALLS only. EXISTING CLIENTS need to add them to the table manually if they will be posting items to the Ledger:
 - Health/Beh Assess/Reassess > 96156
 - Health/Beh Assess/Reassess > 96156
 - Health/Beh Intervent 1st 30min > 96158
 - Health/Beh Intervent each 15mi > 96159
 - Health/Beh Interv Grp 1st 30mi > 96164
 - Health/Beh Interv Grp each 15m > 96165
 - Fm Hlth/Beh Intrv w/Pt 1st 30m > 96167
 - Fm Hlth/Bh Intrv w/Pt ech 15mi > 96168
 - Fm Hlth/Bh Intrv w/o Pt 1st 30 > 96170
 - Fm Hlth/Bh Intrv w/o Pt ech 15 > 96171
 - Adm Pt Foc Hlth Risk Asses > 96160
 - Adm Crgv Foc Hlth Risk Asses > 96161
 - Tobacco Cessation Counseling 3 > 99406
 - Tobacco Cessatoin Counseling I > 99407
 - Alc/Drug Abuse Screen-Brief 15 > 99408
 - Alc/Drug Abuse Screen-Brief > 99409
 - Preventative Med Counsel-Group > 99411
 - Preventative Med Counsel-Group > 99412

(5/22/2020) Financial > Services > Item(s) REMOVED

- The following items were removed for NEW INSTALLS only, as they are no longer valid codes. EXISTING CLIENTS need to remove them from the table manually, if they do not

Look-up Tables > Financial

want their staff to accidentally post them to the Ledger:

- Health/Beh ReAssess 15min > 96151
- Ind Health/Beh Interv > 96152
- Grp Health/Beh Interv > 96153
- Family Health/Beh Interv w/ Pt > 96154

(5/21/2020) Financial > Services > Telehealth Items ADDED

- The following items were added for NEW INSTALLS only. EXISTING CLIENTS need to add them to the table manually if they will be posting Telehealth exams to the Ledger:
 - Online Digital 7 Days 5-10 Min > G2061
 - Online Digital 7 Days 11-20min > G2062
 - Online Digital 7 Days >20 Min > G2063
 - Brief Check in 5-10 min > G2012
 - Remote Eval w/image > G2010
 - Prolong prev svcs 1st 30m > G0513
 - Prolong prev svcs each 30min > G0514
 - Off base opioid tx first m > G2086
 - Off base opioid tx sub m > G2087
 - Off opioid tx month add 30 > G2088
 - Prolonged Serv up to 60 min > 99354
 - Prolonged Serv each 30 after 6 > 99355
 - Online Digital E/M 7D 5-10 Min > 99421
 - Online Digital E/M 7D 11-20min > 99422
 - Online Digital E/M 7D >20 Min > 99423
 - Telephone E&M 5-10 min > 99441
 - Telephone E&M 11-20 min > 99442
 - Telephone E&M 21-30 min > 99443
 - NonPhys Phone Assess 5-10 min > 98966
 - NonPhys Phone Assess 11-20 min > 98967
 - NonPhys Phone Assess 21-30 min > 98968
 - Telehealth Orig Site Fac Fee > Q3014

Look-up Tables > General

(7/17/2020) General > Relationships > Item(s) ADDED

- The following items were added for NEW INSTALLS only. EXISTING CLIENTS need to add them manually if they would like to use them: (Request)
 - Aunt
 - Cousin
 - Mat Grndprnt
 - Pat Grndprnt
 - Uncle

Patient

Patient > Commands

Patient > Command (Print)

(5/1/2020) Command (Print) > Text Message > Must Be On Support

- Clients must be current on Product Support to send Text Messages to the patient.

Patient > Command (Search)

(6/11/2020) Command (Search) > Number of Results Increases

- When searching for a patient, the number of possible results that can display in the window was increased from 50 to 500. (Request)

Patient > Layouts & Tabs

(6/19/2020) Tabs > EDITED: Patient

- Today's Appointments panel
 - The NEW 'Refresh' option was added to the ellipsis hover menu. When clicked, it will refresh the grid with the latest Appointment information. (Request)

Patient > SMART Workflow

(7/9/2020) SMART Workflow > Dashboard > Original Appointment Time

- Highlight a patient name listed in the workstation, and the information displayed will now include the original appointment time scheduled, along with the check-in time. (Request)

Reports

Reports > General Changes

(6/16/2020) General Changes > Hover Hint

- Hover the mouse over the 'Report' command on the main menu and the hover hint has been changed from 'Financial Reporting' to 'All Business Reporting'. (Request)

Reports > Administrative

(7/9/2020) Administrative > EDITED: Instant Message Review

- Parameter/Option changes:
 - IM Status: (*)All, (D)Deleted, (N)on Deleted – NEW (Request)
 - Option to run the report for Instant Messages with ALL statuses (* - Deleted and Non-Deleted), Deleted only (D) or just Non-Deleted (N).
- Report changes:
 - NEW 'EHR # (if any)' column added
 - When the Instant Message was sent, if it was connected to a patient, that patient's unique EHR# will display under this column.

Reports > Appointment

(8/31/2020) Appointment > Analysis > EDITED: Statistics

- Report changes:
 - The 'Reason' field was widened to accommodate the increase in the size of the data field.

Reports > Electronic Health Record

(7/27/2020) Electronic Health Record > ADDED: 2020 PI Patient List

- This NEW report locates patients who are part of the patient population (denominator) for one or more of the 2020 Promoting Interoperability measures. (Request)
- You must first create a data set for in the Dashboard.

Reports > Electronic Health Record

(7/27/2020) Electronic Health Record > ADDED: 2020 PI Simple List

- This NEW report shows the Promoting Interoperability performance measures tracked in EHR. (Request)
- The PI reports mirror what happened in the Dashboard.
- To report on an individual clinician's PI outcomes, you must have created a data set for that individual ID in the Dashboard.

(8/31/2020) Electronic Health Record > EDITED: Portal CCD Communication

- Report changes:
 - NEW page headers for improved navigation
 - Patient name displays: Last, First Middle Initial (Smith, John M)
 - Records now have a sort order per section (see section information below)
 - NEW EXAM SIGNED 'BY' column – ID of the staff member that signed off on the Exam record. Must have Role of 'Provider'.
 - NEW CCD SENT 'BY' column – Login ID of the staff member that SENT the Portal CCD Communication.
 - CCD Documents Sent section
 - Sorted by 'CCD SENT' date, earliest to latest. For CCD's sent on the same date, they will sort by patient last name.
 - The 'Start Date' and 'End Date' for which the report was run, represent the 'CCD SENT' dates.
 - Patient's current Portal E-Mail is displayed. If that is empty, the E-Mail from the Demographic screen will display. If BOTH are empty, it will be blank.
 - EXAM SIGNED BY – Provider that signed off on the Exam.
 - CCD SENT BY – ID of staff that sent the Communication.
 - CCD Documents Not Sent section
 - The data selection and layout are different for this section.
 - Sorted by 'EXAM SIGNED' date, earliest to latest. For CCD's sent on the same date, they will sort by patient last name.
 - The 'Start Date' and 'End Date' for which the report was run, represent the 'EXAM SIGNED' dates.
 - The 'Exam Date' is shown inline for ease of finding the record.
 - The E-Mail is not displayed, as these records have not been sent, and there is no patient E-Mail on file.
 - EXAM SIGNED BY – Provider that signed off on the Exam.
 - CCD SENT BY – Does not display, as these have not been sent.

Reports > Financial

(6/25/2020) Financial > Analysis > EDITED: Audit Trail

- Parameter/Option changes:
 - ADDLOC (Posting Location) – NEW (Request)
 - It is the Physical Location where the activity was posted. (Request)

(7/20/2020) Financial > Analysis > EDITED: Charge Collection Analysis

- Parameter/Option changes:
 - POS (Place of Service Code) – Ledger Place of Service Code – NEW (Request)
 - Default is '*' for All; this includes a blank POS field.
 - The report runs on a two-character POS; if a single character is typed (such as '2'), the report will filter by two characters ('02').
 - Type in '02' to run the report for all Telehealth visits posted.
- Report changes:

Reports > Financial

- NEW column added to report if run with 'Details=True':
 - POS – The Ledger Place of Service Code will display on the individual lines when viewing the report Detail.

(9/18/2020) Financial > Analysis > EDITED: Revenue Opportunity

- Report changes:
 - The section 'Smart Ordering Workflow/Charge Posting' was removed from the report, as it is no longer used.

Reports > System Admin.

(7/13/2020) System Admin. > EDITED: Security Admin. Log

- Report changes:
 - Events generated during the running of 'Function > Audit Tampering Detection' (Request)
 - If the Function 'Audit Tampering Detection' has been run prior to running this report, those events will display with a 'Verify PHI Audit Detected' message, along with one of the following:
 - Possible missing audit record(s) – An audit record number is missing.
 - Possible mismatched audit record – The record might have been edited outside software processes.
 - Verify PHI Audit Detected Possible missing audit record(s)
 - The message is followed by the time of creation of surrounding audit records.
 - Verify PHI Audit Detected Possible mismatched audit record
 - The message is followed by a shaded area with the following current details on the record.
 - LOGIN ID – ID of the person logged in when the event occurred
 - WS – Workstation ID where the event occurred
 - LOCATION – IP address of the workstation where the event occurred
 - ADDED – Date the event occurred
 - AREA – Area of the software the event occurred
 - UNIQUE – Unique record number of the data in the specific area
 - EHR# – Patient's unique number attached to the event
 - AUDIT EVENT – Event that occurred
 - DETAILS – Actual raw data of the event
- NEW 'EPCS Vetting Operations' section (Request)
 - This section shows success or failure of the operation, and other details.
 - DATE – Date Vetting was attempted
 - TIME – Time Vetting was attempted
 - UTC – Coordinated Universal Time
 - EVENT – Reporting of Success or Failure of EPCS Vetting
 - LOGIN ID – Login ID of the person that attempted the Vetting
 - USER ID – If the record of the operation points to a row in the Provider table, this will be the Provider ID, otherwise it will be the Login ID
 - WS – Workstation ID where the Vetting was attempted
 - LOCATION – IP address of the workstation where the Vetting was attempted

Reports > System Admin.

- NEW 'Security Profile Rights Update' section (Request)
 - This section will display the following information for any changes that were made to a User Login Profile Right:
 - DATE – Date change was made
 - TIME – Time change was made
 - UTC – Coordinated Universal Time
 - EVENT – Name of Profile changed, Right changed on the Profile and Change made on the Right (Full to None)
 - LOGIN ID – Login ID of the person that made the change
 - USER ID – If the record of the operation points to a row in the Provider table, this will be the Provider ID, otherwise it will be the Login ID
 - WS – Workstation ID where the change was made
 - LOCATION – IP address of the workstation where the change was made

Utility

Utility > Exam E/M Code Level Logic

(8/14/2020) Exam E/M Code Level Logic > .Logic Pages & Logic Sets > .New Table Format

- Both tables were updated to a new and improved format.
- During the update process the software will look for a match between the User-Owned records and the Compulink-Owned records, and convert them to the new format as Compulink-Owned.
- If a match is NOT found, the User-Owned records will be converted to the new format, left as User-Owned and marked 'Hide=Y'.
- Each practice should review the hidden items to see if they are still valid for their office; if they are, the 'Hide' will need to be changed to 'N'.

(6/25/2020) Exam E/M Code Level Logic > .Logic Pages & Logic Sets > Command(s) ADDED

- The following commands were added with the new table format:
 - Filter – Use the Filter command to control which table records are displayed:
 - Off – Off to view ALL table records - this is the default
 - UnHidden – UnHidden to display records that are not marked Hide=Y
 - Hidden – Hidden to display just records marked Hide=Y
 - Compulink Owned – Compulink Owned to display just those records with Owner=C
 - User Owned – User Owned to display just those records with Owner=U
 - Hide – This command places you into record <Hide> mode. Double click on a table entry to toggle Hide from N to Y. This entry will no longer appear in the table drop-down Click Hide again to stop.
 - Utility – Used to mark the 'Hide' field on ALL records with either 'Y' or 'N'
 - Hide All – Mark ALL entries as 'Hide=Y'
 - UnHide All – Mark ALL entries as 'Hide='N'

(6/25/2020) Exam E/M Code Level Logic > .Logic Pages & Logic Sets > Command(s) REMOVED

- The following commands were removed, as they are no longer needed with the updated table format:
 - Back

Utility > Exam E/M Code Level Logic

- Next

(6/25/2020) Exam E/M Code Level Logic > Logic Pages > Command(s) EDITED

- The following command was edited with the new table format: (Request)
 - Print – A NEW crystal report was created, and contains the following information:
 - Name
 - Modified (Date)
 - Table Name
 - Hide (Y/N)
 - Owner (C/U)
 - Error Message (only appears if populated)
 - Logic (only appears if populated)

(5/15/2020) Exam E/M Code Level Logic > Logic Pages > Field(s) ADDED

- Owner – Each entry has an assigned Owner, 'U' for User or 'C' for Compulink.
 - This allows Compulink to update our records without stepping on those you create.
 - Owner 'C' records are not modifiable, but you can Hide them from Display.
- Hide – Set to 'Y' to Hide the item in the drop-down list.
- Modified – Date this table entry was last edited.

(7/27/2020) Exam E/M Code Level Logic > Logic Sets > Command(s) EDITED

- The following command was edited with the new table format: (Request)
 - Print – A NEW crystal report was created, and contains the following information:
 - Name
 - Modified
 - Post Code
 - Post Code 2
 - Plan
 - Order
 - Hide?
 - DPF
 - Owner
 - Logic (only appears if populated)
 - Notes (only appears if populated)

(8/14/2020) Exam E/M Code Level Logic > Logic Sets > Field(s) ADDED

- Owner – Each entry has an assigned Owner, 'U' for User or 'C' for Compulink.
 - This allows Compulink to update our records without stepping on those you create.
 - Owner 'C' records are not modifiable, but you can Hide them from Display.
- Hide – Set to 'Y' to Hide the item in the drop-down list.
- Display Failure – This corresponds with the 'Error Message' field in the Logic Pages. If set to 'Y', and the Logic Pages listed in the Logic Set fail to meet their criteria when posting from the patient Exam, the 'Error Message' listed on the corresponding Logic Page will display in the 'EHR Automated Fee Posting' window.
- Notes – User may enter a description of what the entry is going to do when posting; this is just a description/note and has no actual functionality when posting.
- Modified – Date this table entry was last edited.

(6/25/2020) Exam E/M Code Level Logic > Logic Sets > Field(s) EDITED

- Order – This field was renamed from Sequence.

Utility > System Administrator

(8/13/2020) System Administrator > Login > Ids > Re-Using Login Records

Utility > System Administrator

- Editing an existing Login record and using it for another person is NOT allowed.
- If an existing record is edited and the 'First' Name field is changed, the following message will appear upon saving:
 - Re-Using Login Records for a different individual is a HIPAA Violation which will be recorded as being made by You!
 - If this is a new individual, you need to Cancel this Edit, and use Add instead! Are you Sure you want to Change the First Name of this Individual?
- Selecting 'No' will leave the record in Edit mode; selecting 'Yes' will save the record.

(5/12/2020) System Administrator > Login > Profiles > NEW Right: Group GUI Access

- The NEW right 'Group GUI Access' was added.
 - This defaults to 'None'.
 - If set to 'Full', users have access to fully edit existing custom GUIs; this includes editing in the GUI Customization area, as well as changing individual icon colors.
 - If set to 'None', the following actions will occur if they attempt to edit a custom GUI that is connected to more than just themselves:
 - In the GUI Customization area, when Edit is clicked, the following message will appear, and they will be prevented from editing: Unable to Modify Customized GUI Record!
 - When right clicking on an icon to change the color, the color pallet will not come up, and the following message will appear: Unable to Customize Colors without Group GUI Update privilege that is shared by Others!

(4/17/2020) System Administrator > Menu Change > Telehealth Video Download MOVED

- The 'Telehealth Video Download' Utility was MOVED to the Patient Exam for easier access.
- In the Exam, click 'Utility > Telehealth Install/download'.

(7/20/2020) System Administrator > Utility SQL Scripts > Script(s) ADDED

- Clear Out Exam State
 - When you save an exam, a copy of how the screens looked is saved.
 - This routine will clean out that visual data, so when viewing an old exam, each tab will grab the latest iteration from Screen Builder. (Request)

Worklists

Worklists > General Changes

(7/20/2020) General Changes > PopUpLayouts

- When a Worklist is setup up to open a PopUPLayout after selecting an item on the list, the PopUpLayout will now open in front of the Worklist for easier access. (Request)

I.T. Specialist Information

(7/27/2020) Ctrl Key on Launch > Special Functionality Window

- Holding the 'Ctrl' key down on the keyboard when launching the software will bring up a window to select from the following functionality (Enter a letter to select):
 - R=Rebuild Dictionary – Rebuilds the Dictionary.Add file that is used by the software and interfaces, then opens the software
 - I=Index Specific Table – User chooses the table(s) to index
 - Opens a window to Enter characters for table search filtering.

I.T. Specialist Information

- Enter a table name or partial table name (like Patient) and click 'OK'.
- The 'Select Table to Re-Index' window opens with possible table matches; double click on one to select.
- Click 'OK' on the 'Indexing Completed!' message.
- Either enter another search filter to index another table, or click 'Cancel'.
- After clicking 'Cancel', the software will open.
- E=Review Start up Errors – Displays a list of errors that were displayed in the software in the last 7 days.
 - Information on the list includes the following:
 - Added – Date the error appeared in the software
 - Location – IP Address of the workstation that had the error
 - ID – ID of the person that was logged into the software when the error occurred
 - Source – Location in the software where the error came from
 - Details – Details that were displayed in the error PopUp window
 - After closing the list, the software will open.
- D=Diagnostics – Runs a 'Complete' Diagnostics with the 'Index Only' box checked; does NOT open the software when completed.



(4/27/2020) Message on Launch > Test Mode

- During troubleshooting with a Customer Service Rep from Compulink, you may have added a Test.flg file to the Advantage product folder.
- If this file exists, the following message will display upon launch of the software: Test Mode is ON due to Test.Flg existence
- You MUST exit the Advantage software, go into the product folder and either rename or delete the Test.Flg file.