



Psych Advantage
Version 12.5 Service Pack Enhancements
(Includes Multiple Service Packs)
Document Revised (1/6/2023)

Items listed on this document are the Service Pack Enhancements released with incremental updates between version steps (e.g. V12.5 To V12.6).

Enhancements are presented from newest to oldest within each section.

The current version in distribution is 12.5.0.26. Enhancements with a Service Pack number GREATER than this are in BETA, and will be available soon. Look for **BV** in the left margin to see what's coming. You can also search for the entries with "BV" by using the keyboard shortcut CTRL-F, entering BV, then selecting the Previous/Next buttons to move between them.

The current version in distribution is 12.5.0.26. Enhancements with a Service Pack number GREATER than this are in BETA, and will be available soon.

The "**KNOW BEFORE YOU GO**" section includes important items for your office to review **PRIOR TO UPDATING** to this new version. Look for screen, table and other changes that might affect your workflow. **X** Items with a red X are additional important items.

Items marked ([Request](#)) were requested by clients and satisfied in the associated update.

[Click here](#) to access enhancement details for Documents, EHR Screens and Smart Functions. This Content Catalog is evolving, covering changes since Version 12.2, and is updated frequently.

[Click here to open an E-mail to send questions or comments to the Compulink Documentation department.](#)

The topics in the *Table of Contents* contain links; click a topic to jump to that spot in the document. Click on the **red** page number at the bottom right of the page to return.

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KNOW BEFORE YOU GO

X	<u>(12.5.0.26) Hot Topic > Ledger > Global Payments Integrated for Credit Card Integration</u>
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KNOW BEFORE YOU GO

- Global Payments Integrated (GPI) is retiring their old platform to provide a more secure application.
 - Included in this new platform are features which support far superior encryption and contactless use capability.
 - The deadline for the transition to the new platform is November 15, 2022.
- Advantage Version 12.5 supports GPI's new platform.
 - The latest build, Version 12.5.0.26 is available in pre-release so you can prepare for the changes.
- Some clients may need to obtain new card readers directly from GPI prior to the deadline for the transition.
 - GPI will be in touch with those offices utilizing non-compatible devices and will send devices out in the next couple of weeks.
 - The only devices that will work on this new platform are the following:
 - Verifone P400
 - Verifone e285
 - Magtek Dynamag level 3 devices only (if you are unsure of the level of your device, please contact GPI)

***As of November 16, 2022, any office running a previous version of Compulink and/or using old card readers will not be able to successfully post credit card payments either via a device or CC Card-on-File process.

- To prevent any disruption of service, please review and complete the items below:
 - ALL CLIENTS using GPI need to update their Compulink software to Version 12.5.0.26 no later than November 15, 2022.
 - Since this version build is pre-release, Compulink's Customer Care department will be reaching out to clients to assist them with the update process.
 - Once the version build is on distribution, your office will be able to run the update from the Utility.
 - ALL CLIENTS using GPI will need to reach out to Global Payments Integrated once your Compulink software update is complete to ensure that your account is reconfigured to work on the new platform.
 - If you update your software and do not get reconfigured by GPI, when entering credit card payments, you will have to manually type in all necessary information.
 - They can be reached at 800-774-6462, option 2.
 - Clients utilizing a non-compatible card reader need to obtain a new approved device directly from GPI.
 - You need to receive this prior to updating the Advantage software, as the device will need to be reconfigured by you and a GPI support representative before it will work.

For questions regarding your device, Global Payments Integrated can be reached at 800-774-6462, option 2.

(12.5.0.26) Ledger > Credit > Responsible > Credit Card Payment

- Global Payments Integrated (GPI) is retiring their old platform to provide a more secure application.
- All clients using GPI need to update their Compulink software to the latest version build of 12.5.0.26 no later than November 15, 2022.
- All clients using GPI need to reach out to Global Payments Integrated once the Compulink software is updated to ensure that your account is reconfigured to work on the new

KNOW BEFORE YOU GO

platform.

- Clients utilizing a non-compatible card reader need to obtain a new approved device directly from GPI.
- Upon saving the payment at the Ledger, a new Charge Through Secure Connection window opens to display the following:
 - Total Amount (\$) – Credit amount that was entered at the Ledger
 - Transaction Type: – CREDITSALE
 - Card Data – Field to enter the Credit Card number
- If using the pin pad, type the number into the field.
 - As you start typing, the window changes and displays the following fields for you to enter the data:
 - Card Number – This is the same as the Card Data field above.
 - Expiry – Expiration date of the card (month in the first field and year in the second field).
 - CVV – Card Verification Value (from the back of the card).
 - After entering all data, click the Make Payment button.
- If using the card reader, swipe the card.
 - This contains all of the data, so no need to enter it as with the pin pad.
- Once the payment is processed the Transaction Result window opens with the following:
 - Primary Response Code
 - Requested Amount
 - Approved Amount
 - Order ID
 - Transaction Type – CREDITSALE
 - Bank Approval Code
 - Response Message – Displays Approval if completed

Hot Topics

(12.5.0.26) Patient > URGENT: Text Messaging Update

*** Deadline of 1/6/2023.

- You should have already received an E-mail from Compulink regarding this matter.
- Telecommunications carriers such as Verizon, AT&T, T-Mobile, etc. are required to update their technology to the industry standards for A2P 10DLC.
 - A2P 10DLC refers to a system in the United States that allows businesses to send Application-to-Person (A2P) type messaging via standard 10-digit long code (10DLC) phone numbers.
- This update requires Compulink clients to provide additional business identifying information, including the Tax Filing Business Name and Tax ID.
- Each outgoing phone number texting from the Compulink Advantage software requires verification NO LATER THAN 1/6/2023.
- To continue to use our FREE built-in texting, you are required to fill out the form at this link: [https://new.advantageedi.com/p/g.dll/\\$/Start](https://new.advantageedi.com/p/g.dll/$/Start)
- If your phone number is not verified with your business associated to it by 1/6/2023, you will most likely experience a high rate of failed delivered text messages.

(12.5.0.26) Ledger > Global Payments Integrated for Credit Card Integration

- Global Payments Integrated (GPI) is retiring their old platform to provide a more secure application.
 - Included in this new platform are features which support far superior encryption and contactless use capability.

Hot Topics

- The deadline for the transition to the new platform is November 15, 2022.
- Advantage Version 12.5 supports GPI's new platform.
 - The latest build, Version 12.5.0.26 is available in pre-release so you can prepare for the changes.
- Some clients may need to obtain new card readers directly from GPI prior to the deadline for the transition.
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 - The only devices that will work on this new platform are the following:
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 - ALL CLIENTS using GPI will need to reach out to Global Payments Integrated once your Compulink software update is complete to ensure that your account is reconfigured to work on the new platform.
 - If you update your software and do not get reconfigured by GPI, when entering credit card payments, you will have to manually type in all necessary information.
 - They can be reached at 800-774-6462, option 2.
 - Clients utilizing a non-compatible card reader need to obtain a new approved device directly from GPI.
 - You need to receive this prior to updating the Advantage software, as the device will need to be reconfigured by you and a GPI support representative before it will work.

For questions regarding your device, Global Payments Integrated can be reached at 800-774-6462, option 2.

Education



(12.5.0.26) Video > NEW: Accounting Interface

- The Compulink University course 'Accounting Interface' was added.
- It can be found under the following Program: Practice Admin
- Course Description: Review the available options for interfacing your 3rd party accounting software with Advantage and walk through an overview of the setup process.
- Published: 12/21/22 - Length: 11 Minutes



(12.5.0.26) Video > NEW: DMA Tools I

- The Compulink University course 'DMA Tools I' was added.

Education

	<ul style="list-style-type: none"> • It can be found under the following Program: Word Processing • Course Description: This is part one of three of the DMA Tools Functions series. This course covers the IF Value Is option. • Published: 12/21/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.26) Video > NEW: DMA Tools II</u></p> <ul style="list-style-type: none"> • The Compulink University course 'DMA Tools II' was added. • It can be found under the following Program: Word Processing • Course Description: This is part two of three of the DMA Tools Functions series. This course covers Look-up Table Fields, Exam Image and Appointment Field Filters. • Published: 12/21/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.26) Video > NEW: Inventory: Location Transfer and Receive Transfers Function</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Location Transfer and Receive Transfers Function' was added. • It can be found under the following Program: Inventory • Course Description: This course reviews the Inventory Location Transfer and Receive Transfer Functions. • Published: 12/8/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.26) Video > UPDATED: Activate: System and Financial Table Setup V12.5 > Greater</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: System and Financial Table Setup V12.5 > Greater' was updated. • It can be found under the following Program: Activate Advantage • Course Description: Learn about System Setup default efficiencies and Financial Tables in this Activate Advantage course. • Re-Published: 12/8/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.26) Video > UPDATED: AdvantageERx: Prescription Drug Monitoring Program (PDMP)</u></p> <ul style="list-style-type: none"> • The Compulink University course 'AdvantageERx: Prescription Drug Monitoring Program (PDMP)' was updated. • It can be found under the following Program: E-Prescribing • Course Description: Review the Prescription Drug Monitoring Program (PDMP) set up and functionality. • Re-Published: 12/8/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: APE: Recommended Daily Workflow</u></p> <ul style="list-style-type: none"> • The Compulink University course 'APE: Recommended Daily Workflow' was added. • It can be found under the following Program: Advantage Patient Experience • Course Description: Review a recommended daily workflow for Advantage Patient Experience, powered by Promptly. • Published: 11/22/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: APE: Table Setup III</u></p> <ul style="list-style-type: none"> • The Compulink University course 'APE: Table Setup III' was added. • It can be found under the following Program: Advantage Patient Experience • Course Description: Learn to set up the Broadcast, Questionnaire, Personal Message Types and Follow-up Worklists Actions tables on the Promptly Admin site. • Published: 9/15/22 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Activate: General Table Setup</u></p>

Education

	<ul style="list-style-type: none"> • The Compulink University course 'Activate: General Table Setup' was added. • It can be found under the following Program: Activate Advantage. • Course Description: This course teaches Administrators and Management staff the basics of General Table Setup. • Published: 8/18/22 - Length: 17 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Advantage Patient Experience: Client Dashboard</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Advantage Patient Experience: Client Dashboard' was added. • It can be found under the following Program: Advantage Patient Experience • Course Description: This course shows an example of the Promptly Client Dashboard as it appears once you've completed Implementation and Setup. • Published: 8/25/22 - Length: 15 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Credit Card Cos & Tender Types Tables</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Credit Card Cos & Tender Types' was added. • It can be found under the following Program: Tables: Financial • Course Description: Learn the functionality and maintenance of the Financial Credit Card Co's and Tender Types tables. • Published: 9/16/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: DMA Functions II</u></p> <ul style="list-style-type: none"> • The Compulink University course 'DMA Functions II' was added. • It can be found under the following Program: Word Processing • Course Description: This is part two of the DMA General Functions series. Included are the functions IIF through Table Functions. • Published: 11/22/22 - Length: 19 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: DMA General Functions</u></p> <ul style="list-style-type: none"> • The Compulink University course 'DMA: General Functions' was added. • It can be found under the following Program: Word Processing • Course Description: This is part one of two courses reviewing the General Functions in the Data Merge Assist. • Published: 11/3/22 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: EDI: Change Healthcare Eligibility</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EDI: Change Healthcare Eligibility' was added. • It can be found under the following Program: Billing: Insurance • Course Description: Learn how to obtain insurance benefit information directly from your Advantage software. Walk through the request and enrollment process and demonstrate Batch Eligibility. • Published: 9/29/22 - Length: 20 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: EDI: Remittance Part 1: Setup and Viewing</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EDI: Remittance Part 1: Setup and Viewing' was added. • It can be found under the following Program: Billing: Insurance. • Course Description: This course provides information you should be aware of prior to starting Remittance Posting. • Published: 8/18/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: EDI: Remittance Part 2: Remittance Posting</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EDI: Remittance Part 2: Remittance Posting' was added.

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	<ul style="list-style-type: none"> • It can be found under the following Program: Billing: Insurance • Course Description: Remittance Part II gets you started with auto-posting ERAs. Walk through the basic setup for new payors in the Payor Setup Wizard and learn about the available resources. • Published: 8/25/22 - Length: 19 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: EDI: Remittance Part 3: Payer Wizard Advanced Features</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EDI: Remittance Part 3: Payer Wizard Advanced Features' was added. • It can be found under the following Program: Billing: Insurance • Course Description: Review customizable configurations in the Payer Setup Wizard Advanced Features: Advanced Remark Code Setup, Never Post Codes and the Advance Adjustment Max button. • Published: 9/15/22 - Length: 22 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: EHR Table Subgroups</u></p> <p>The Compulink University course 'EHR Table Subgroups' was added.</p> <ul style="list-style-type: none"> • It can be found under the following Program: EHR: General Info • Course Description: Learn how to build a Subgroup of related items in a look-up table. • Published: 8/26/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Financial: Miscellaneous Fee Table</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Financial: Miscellaneous Fee Table' was added. • It can be found under the following Program: Tables: Financial • Course Description: Review the purpose and maintenance of the Financial Materials table. • Published: 11/3/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: General Table Subgroups</u></p> <ul style="list-style-type: none"> • The Compulink University course 'General Table Subgroups' was added. • It can be found under the following Program: Tables: General • Course Description: Learn how to build a Subgroup of related items in a look-up table. • Published: 8/26/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Get Your Direct E-Mail from Updox</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Get Your Direct E-Mail from Updox' was added. • It can be found under the following Program: Communication • Course Description: Walk step by step through the process of obtaining a Direct E-Mail address, used for secure messaging. • Published: 9/16/22 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: How To Complete Your Patient Registration</u></p> <ul style="list-style-type: none"> • The Compulink University course 'How To Complete Your Patient Registration' was added. • It can be found under the following Program: Web Reg • Course Description: This short video walks patients through the Web Registration process. • Published: 9/15/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Inventory Reports</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory Reports' was added. • It can be found under the following Program: Inventory • Course Description: This course reviews the Inventory reports and their parameters. • Published: 10/19/22 - Length: 15 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Inventory: Adding Frames</u></p>

Education

	<ul style="list-style-type: none"> • The Compulink University course 'Inventory: Adding Frames' was added. • It can be found under the following Program: Tables: Inventory • Course Description: This course reviews how to add Frames to your Inventory etiehr manually or using the Frames Data SPEX UPC service. • Published: 10/7/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Inventory: Place & Receive Orders</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Place & Receive Orders' was added. • It can be found under the following Program: Inventory • Course Description: This course reviews the functionality of the Place & Receive Orders Functions. • Published: 10/21/22 - Length: 11 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Inventory: Place & Receive Orders</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Place & Receive Orders' was added. • It can be found under the following Program: Inventory • Course Description: This course reviews the Place and Receive Orders Functions. • Published: 11/22/22 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Ledger: Alternate Receipt Options</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Alternate Receipt Options' was added. • It can be found under the following Program: Ledger • Course Description: Review the alternate receipt options found under the Ledger > Print command and learn how to change the default receipt. • Published: 11/3/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Ledger: Print Command</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Print Command' was added. • It can be found under the following Program: Tables: Ledger • Course Description: Learn how to run and what each of the following Print commands is used for: Receipt, Statement, Auto-Superbill, Insurance Claim, Lab History, ledger, SuperBill and Tracer. • Published: 10/7/22 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Ledger: Print Commands</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Print Commands' was added. • It can be found under the following Program: Ledger • Course Description: Review the commands found within the Ledger > Print command. • Published: 10/19/22 - Length: 20 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Letter Customization Tips</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Letter Customization Tips' was added. • It can be found under the following Program: Word Processing • Course Description: This course provides Letter Customization Tips for word processing. • Published: 10/27/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Multiple Resource Scheduling</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Multiple Resource Scheduling' was added. • It can be found under the following Program: Appointments • Course Description: Review the setup and functionality associated with scheduling appointments across multiple resources. • Published: 9/1/22 - Length: 10 Minutes

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<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Patient Search Options</u></p> <ul style="list-style-type: none">• The Compulink University course 'Patient Search Options' was added.• It can be found under the following Program: Patient Flow• Course Description: This short course provides an overview of the Search window and all of its enhanced features.• Published: 11/11/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Patient Tables</u></p> <ul style="list-style-type: none">• The Compulink University course 'Patient Tables' was added.• It can be found under the following Program: Tables: General• Course Description: Review the purpose and maintenance of the following Patient tables: Lock-Out Reasons, Contact Release, Organization and Role, Confidentiality type and Communication Type.• Published: 8/18/22 - Length: 11 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Relationship and Salutation Tables</u></p> <ul style="list-style-type: none">• The Compulink University course 'Relationship and Salutations Tables' was added.• It can be found under the following Program: Tables: General• Course Description: Review the purpose and maintenance of the relationship and Salutation tables.• Published: 8/18/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Scanned Document Types Table</u></p> <ul style="list-style-type: none">• The Compulink University course 'Scanned Document Types Table' was added.• It can be found under the following Program: Tables: General• Course Description: Review the purpose and maintenance of the Scanned Document Types table.• Published: 8/18/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Signing Documents</u></p> <ul style="list-style-type: none">• The Compulink University course 'Signing Documents' was added.• It can be found under the following Program: Word Processing• Course Description: Review the Needs Signature Functionality and options.• Published: 11/3/22 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Staff Tables</u></p> <ul style="list-style-type: none">• The Compulink University course 'Staff Tables' was added.• It can be found under the following Program: Tables: General• Course Description: Review the purpose and maintenance of the Staff > Groups and Staff > Hours tables.• Published: 8/18/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Tips for Billing Success</u></p> <ul style="list-style-type: none">• The Compulink University course 'Tips for Billing Success' was added.• It can be found under the following Program: Billing: Insurance• Course Description: Learn some practical tips for billing success with insurance claims and patient statements.• Published: 11/22/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: ToDo Follow-up Function</u></p> <ul style="list-style-type: none">• The Compulink University course 'ToDo Follow-up Function' was added.• It can be found under the following Program: Functions• Course Description: This tutorial explains the options and features of the Patient

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	<p>ToDo/FollowUp Function, including Add Default ToDos.</p> <ul style="list-style-type: none"> • Published: 9/29/22 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: ToDo Follow-up Tables and Add Defaults</u></p> <ul style="list-style-type: none"> • The Compulink University course 'ToDo Follow-up Tables and Add Defaults' was added. • It can be found under the following Program: Tables: General • Course Description: Review the purpose and maintenance of the Todo Follow-up tables and learn how Add Defaults function • Published: 9/29/22 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > NEW: Web Registration: Patient Focused Education</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Web Registration: Patient Focused Education' was added. • It can be found under the following Program: Web Reg • Course Description: Take a look at a new Patient Focused Web Registration Resource, now available on your Web Registration. • Published: 9/15/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: APE: Table Setup II</u></p> <ul style="list-style-type: none"> • The Compulink University course 'APE: Table Setup II' was updated. • It can be found under the following Program: Advantage Patient Experience • Course Description: Learn to set up the Configuration Decision Tree and Mandatory Fies tables on the Promptly Admin site. • Re-Published: 11/22/22 - Length:19 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Accessing Compulink University from Mobile Devices</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Accessing Compulink University from Mobile Devices' was added. • It can be found under the following Program: eLearning Resources • Course Description: Learn how to navigate Compulink University from your mobile device. • Re-Published: 9/29/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: EHR Basics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: EHR Basics' was added. • It can be found under the following Program: Activate Advantage • Course Description: Compulink Advantage Clients will be introduced to the basics of EHR in this course. Learn how to access EHR, create a layout, EHR Commands, information entry and much more. • Re-Published: 9/29/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: EHR Basics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: EHR Basics' was updated. • It can be found under the following Program: Activate Advantage • Course Description: This course will introduce attendees to the features related to EHR documentation and functionality. Topics include layouts, icons, shortcuts and Government compliance. • Re-Published: 10/7/22 - Length: 26 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: EHR Basics for Addiction and Psych</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: EHR Basics for Addiction and Psych' was updated. • It can be found under the following Program: Activate Advantage

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	<ul style="list-style-type: none"> • Course Description: This course introduces Addiction and Psych clients to the basics of EHR. Clients will learn how to add and edit Patient medical records, EHR Commands and much more. • Re-Published: 10/19/22 - Length: 21 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: Patient Services and Demographics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Patient Services and Demographics' was updated. • It can be found under the following Program: Activate Advantage • Course Description: This course introduces Patient Demographics features. Upon completion, attendees will be able to create and search for a patient record, add insurance information and much more. • Re-Published: 11/11/22 - Length: 25 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: To Onboard New Staff</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: To Onboard New Staff' was added. • It can be found under the following Program: Activate Advantage • Course Description: Activate Advantage offers an interactive format that is effective for onboarding new staff or as a refresher for all users. • Re-Published: 9/29/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Activate: To Onboard New Staff</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: To Onboard New Staff' was updated. • It can be found under the following Program: Activate Advantage • Course Description: Activate Advantage offers an interactive format that is effective for onboarding new staff or as a refresher for all users. • Re-Published: 11/11/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Advantage Help User Interface</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Advantage Help User Interface' was added. • It can be found under the following Program: eLearning Resources • Course Description: Help is a searchable electronic user's guide, designed to give you instant access to the information you need. • Published: 9/15/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Client Web Portal Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Client Web Portal Education Resources' was added. • It can be found under the following Program: eLearning Resources • Course Description: Tour the eLearning and Training Education resources on the client web portal. • Published: 9/15/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Client Web Portal Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Client Web Portal Education Resources' was added. • It can be found under the following Program: eLearning Resources • Course Description: Tour the eLearning and Training Education resources on the client web portal. • Re-Published: 9/29/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Client Web Portal Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Client Web Portal Education Resources' was updated. • It can be found under the following Program: eLearning Resources • Course Description: Tour the eLearning and Training Education resources on the client

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	<p>web portal.</p> <ul style="list-style-type: none"> • Re-Published: 11/3/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Compulink University: Program Index</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Compulink University: Program Index' was added. • It can be found under the following Program: eLearning Resources • Course Description: Take a quick look at the Program Index efficiency tool in the University Course Catalog page. • Published: 8/31/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Compulink University: Quick Start</u></p> <p>The Compulink University course 'Compulink University: Quick Start' was added.</p> <ul style="list-style-type: none"> • It can be found under the following Program: eLearning Resources • Course Description: Take a quick look at how to log in to Compulink University and register for courses. • Published: 8/31/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Compulink University: Quick Start</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Compulink University: Quick Start' was updated. • It can be found under the following Program: eLearning Resources • Course Description: Take a quick look at how to log in to Compulink University and register for courses. • Re-Published: 10/19/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Content Catalogs</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Content Catalogs' was added. • It can be found under the following Program: eLearning Resources • Course Description: View the Content Catalog of detailed enhancements to exam screens, documents and smart functions. • Published: 9/16/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Creating Student Accounts in Compulink University</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Creating Student Accounts in Compulink University' was added. • It can be found under the following Program: eLearning Resources • Course Description: Review how to configure your Advantage user accounts for Compulink University access. • Re-Published: 9/29/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: DMA Table Options</u></p> <ul style="list-style-type: none"> • The Compulink University course 'DMA Table Options' was updated. • It can be found under the following Program: Word Processing • Course Description: Review how to use the DMA window and how to create a Table with Table Options. • Re-Published: 10/19/22 - Length: 13 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: EDI: Remittance Part 2: Remittance Posting</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EDI: Remittance Part 2: Remittance Posting' was updated. • It can be found under the following Program: Billing: Insurance • Course Description: Remittance Part II gets you started with auto-posting ERAs. Walk through the basic setup for new payors in the Payor Setup Wizard and learn about the available resources.

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	<ul style="list-style-type: none"> • Re-Published: 10/27/22 - Length: 19 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: ELearning Tools and Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Elearning Tools and Resources' was updated. • It can be found under the following Program: eLearning Resources • Course Description: Visit the Education pages on our client web portal, Compulink University and our Online Help file. • Re-Published: 10/7/22 - Length: 22 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Elearning Tools and Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Elearning Tools and Resources' was added. • It can be found under the following Program: eLearning Resources • Course Description: Visit the Education pages on our client web portal, Compulink University and our Online Help file. • Re-Published: 9/15/22 - Length: 22 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Elearning Tools and Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Elearning Tools and Resources' was updated. • It can be found under the following Program: eLearning Resources • Course Description: Visit the Education pages on our client web portal, Compulink University and our Online Help file. • Re-Published: 11/3/22 - Length: 22 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Function: Reset Claim Billing Utility</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Function: Reset Claim Billing Utility' was updated. • It can be found under the following Program: Billing: Insurance • Course Description: Learn how the Reset Claim Billing Utility can be used to easily rebill claim batches. • Re-Published: 11/22/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: How To Complete Your Patient Registration</u></p> <ul style="list-style-type: none"> • The Compulink University course 'How To Complete Your Patient Registration' was updated. • It can be found under the following Program: Web Reg • Course Description: This short video walks patients through the Web Registration process. • Re-Published: 10/19/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Inventory: Adding Frames</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Adding Frames' was updated. • It can be found under the following Program: Inventory • Course Description: This course reviews how to add Frames to your Inventory either manually or using the Frames Data SPEX UPC service. • Re-Published: 10/19/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: New Education Resource on the Client Website</u></p> <ul style="list-style-type: none"> • The Compulink University course 'New Education Resource on the Client Website' was added. • It can be found under the following Program: eLearning Resources • Course Description: A new Education Resources document is available for Version 12.5 and greater. • Re-Published: 9/29/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Pooled/Past/Pending Insurance</u></p>

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	<ul style="list-style-type: none"> • The Compulink University course 'Pooled/Past/Pending Insurance' was updated. • It can be found under the following Program: Billing: Insurance • Course Description: Explore the difference between an Active Pooled, Past or Pending Insurance carrier. • Re-Published: 11/22/22 - Length:4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Provider Table</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Provider Table' was added. • It can be found under the following Program: Tables: General • Course Description: Review the purpose and maintenance of the Provider table as it relates to medical records, E-Prescribing, billing and financials. • Published: 9/15/22 - Length: 15 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.25) Video > UPDATED: Web Registration: Completing and Importing Data</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Web Registration: Completing and Importing Data' was updated. • It can be found under the following Program: Web Reg • Course Description: Review the patient registration process and how to import registration data into your software. • Re-Published: 11/11/22 - Length:18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.24) Video > NEW: Adding Patient ToDos</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Adding Patient ToDos' was added. • It can be found under the following Program: Patient Flow. • Course Description: This course explains how to access, add and mark ToDos items complete on your patient accounts. • Published: 7/7/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.24) Video > NEW: Admin Information for Inventory Functions</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Admin Information for Inventory Functions' was added. • It can be found under the following Program: Inventory. • Course Description: This course reviews Inventory Functionality, related reports, peripheral options and specific component details. • Republished: 6/29/22 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.24) Video > NEW: Advantage Patient Experience: Table Setup I</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Advantage Patient Experience: Table Setup I' was added. • It can be found under the following Program: Advantage Patient Experience. • Course Description: Learn to set up the Users and Users Groups tables on the Promptly Admin site. • Published: 7/20/22 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.24) Video > NEW: Advantage Patient Experience: Table Setup II</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Advantage Patient Experience: Table Setup II' was added. • It can be found under the following Program: Advantage Patient Experience. • Course Description: Learn to set up the Configuration, Decision Tree and Mandatory Fields tables on the Promptly Admin site. • Published: 8/5/22 - Length: 19 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.24) Video > NEW: Insurance Billing: Basic Table Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Insurance Billing: Basic Table Setup' was added.

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	<ul style="list-style-type: none"> • It can be found under the following Program: Billing: Insurance. • Course Description: Learn about the table setup required for billing professional insurance claims (CMS1500) through your Advantage software. • Republished: 6/29/22 - Length: 17 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Inventory Tables</p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Audit' was added. • It can be found under the following Program: Inventory Tables. • Course Description: This course reviews the Inventory tables. • Published: 7/20/22 - Length: 11 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Inventory: Audit</p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Audit' was added. • It can be found under the following Program: Tables: Inventory. • Course Description: This course reviews running the Audit Function and reviewing the Inventory Discrepancy Report. • Published: 7/20/22 - Length: 8 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Inventory: Batch Adjustments</p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory: Batch Adjustments' was added. • It can be found under the following Program: Inventory. • Course Description: This course reviews the Batch Adjustments Function. • Published: 8/5/22 - Length: 4 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Labs Tables</p> <ul style="list-style-type: none"> • The Compulink University course 'Labs Tables' was added. • It can be found under the following Program: Tables: General. • Course Description: Review the purpose and maintenance of the Medical Labs tables; Labs List and Acct#s, Location Provider Settings. • Published: 7/20/22 - Length: 7 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Ledger: View Commands</p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: View Commands' was added. • It can be found under the following Program: Ledger. • Course Description: Each of the commands on the Ledger > View menu will be explained and demonstrated in this course. • Published: 7/7/22 - Length: 10 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Location Tables</p> <ul style="list-style-type: none"> • The Compulink University course 'Location Tables' was added. • It can be found under the following Program: Tables: General. • Course Description: Review the purpose and maintenance of the Recall look-up tables; Recall Reason and Recall Periods. • Published: 7/20/22 - Length: 17 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: Recall Tables</p> <ul style="list-style-type: none"> • The Compulink University course 'Recall Tables' was added. • It can be found under the following Program: Tables: General. • Course Description: Review the purpose and maintenance of the Recall look-up tables; Recall Reason and Recall Periods. • Published: 7/20/22 - Length: 6 Minutes
<input type="checkbox"/>	<p>(12.5.0.24) Video > NEW: SMART Orders Setup Overview</p>

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- The Compulink University course 'SMART Orders Setup Overview' was added.
- It can be found under the following Program: EHR: General Info.
- Course Description: Learn how to create a new order set or edit an existing one.
- Republished: 6/29/22 - Length: 13 Minutes

(12.5.0.23) Compulink University > Updates

- The following updates were made to Compulink University:
 - Course Catalog tab
 - Program list
 - The word 'Programs' was added to the top of the list on the left.
 - The Program names were shortened to be more direct and make things easier to find.
 - The Activate Advantage programs for New and Established clients were combined to make things easier for clients to find.
 - The About Version Program at the top just contains the current version that is on distribution.
 - All legacy versions were moved toward the bottom of the Programs list.
 - Program Index
 - A NEW Program Index link now displays in the middle of the screen.
 - This opens a feature locator document that shows what program the user can find topics of interest in.
 - Example:
 - Feature: Text Messages
 - Program: Patient Flow
 - Course: Patient Messaging

(12.5.0.23) Video > NEW: APE: Implementation Process Overview

- The Compulink University course 'APE: Implementation Process Overview' was added.
- It can be found under the following Program: Advantage Patient Experience.
- Course Description: This presents a broad overview of what to expect throughout the setup and integration process for the Advantage Patient Experience, powered by Promptly.
- Republished: 6/17/22 - Length: 5 Minutes

(12.5.0.23) Video > NEW: Adding a Patient Contact

- The Compulink University course 'Adding a Patient Contact' was added.
- It can be found under the following Program: Patient Flow.
- Course Description: Review the Patient Contact screen, its purpose and definitions of all field options.
- Republished: 6/17/22 - Length: 8 Minutes

(12.5.0.23) Video > NEW: Adding a Patient's Picture

- The Compulink University course 'Adding a Patient's Picture' was added.
- It can be found under the following Program: Patient Flow.
- Course Description: This course will demonstrate how to setup the digital web camera for Patient photos and how to add a photo to the Patient record.
- Republished: 6/17/22 - Length: 3 Minutes

(12.5.0.23) Video > NEW: Advantage Patient Experience

- The Compulink University course 'Advantage Patient Experience' was added.
- It can be found under the following Program: Advantage Patient Experience.
- Course Description: Advantage Patient Experience, powered by Promptly, is an online patient experience suite, designed to enhance patient touchpoints, increase payments

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	<p>and automate processes. Here's a brief look at some of the available features.</p> <ul style="list-style-type: none"> • Republished: 6/17/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Appointment Communications Function</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Appointment Communications Function' was added. • It can be found under the following Program: Functions. • Course Description: Learn how to generate personalized appointment communications via a batch process using letter, post cards or E-Mail. • Published: 6/7/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Compulink University: Program Index</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Compulink University: Program Index' was added. • It can be found under the following Program: eLearning Resources. • Course Description: Take a quick look at the Program Index efficiency tool in the University Course Catalog page. • Published: 6/7/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Daily Appointment Reports</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Daily Appointment Reports' was added. • It can be found under the following Program: Appointments. • Course Description: This course reviews each of the reports of the Appointment > Daily menu: Auth Visit Status, Insurance Authorizations, No Appt Activity, No First Appt, No Future Appt and Missing Charges reports. • Published: 5/26/22 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Ledger: Batch > Worklist</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Batch > Worklist' was added. • It can be found under the following Program: Ledger. • Course Description: The Ledger Batch > Worklist is an efficiency tool for batch posting of EOBs across multiple patient ledgers. • Republished: 6/17/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Portal: Access Your Health Information</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Access Your Health Information' was added. • It can be found under the following Program: Patient Portal. • Course Description: Learn how to access and view health information your provider has uploaded to your Patient Portal. • Published: 5/19/22 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Portal: Message Your Provider</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Message Your Provider' was added. • It can be found under the following Program: Patient Portal. • Course Description: Learn how to message your provider from within the Patient Portal. • Published: 5/19/22 - Length: 1 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Portal: Patient Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Patient Education Resources' was added. • It can be found under the following Program: Patient Portal. • Course Description: Learn about the new videos and online Help available to your patients on the MySecureHealthData sign-in page. • Published: 5/19/22 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Portal: Registration and Logging In</u></p>

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	<ul style="list-style-type: none"> • The Compulink University course 'Portal: Registration and Logging In' was added. • It can be found under the following Program: Patient Portal. • Course Description: This short video will explain the step-by-step process for how to register and validate a patient account on the portal, from the patient's perspective. • Published: 5/19/22 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: QM #1: Diabetes: HbA1c Poor Control</u></p> <ul style="list-style-type: none"> • The Compulink University course 'QM #1: Diabetes: HbA1c Poor Control' was added. • It can be found under the following Program: Govt Compliance. • Course Description: This course covers how to document the 2022 Quality Measure #1 NQF #0059 diabetes: hemoglobin A1c (HbA1c) Poor Control (>9%) in your Advantage software. • Published: 6/7/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: QM#130: Document Current Medications</u></p> <ul style="list-style-type: none"> • The Compulink University course 'QM#130: Document Current Medications' was added. • It can be found under the following Program: Govt Compliance. • Course Description: This course covers how to document the 2022 Quality Measure #130 NQF #0419: Documentation of Current Medications in the Medical Record in your Advantage software. • Published: 6/7/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: QM#236: Controlling High Blood Pressure</u></p> <ul style="list-style-type: none"> • The Compulink University course 'QM#236: Controlling High Blood Pressure' was added. • It can be found under the following Program: Govt Compliance. • Course Description: This course will cover how to document Quality Measure #236 NQF #0018 Controlling High Blood Pressure in your Advantage software. • Republished: 6/17/22 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Scanner Overview and Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Scanner Overview and Setup' was added. • It can be found under the following Program: Practice Admin. • Course Description: This course reviews how to set up a scanner with the Advantage software. • Published: 6/7/22 - Length: 11 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Scanning in Advantage</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Scanning in Advantage' was added. • It can be found under the following Program: Patient Flow. • Course Description: This course reviews scanning documents in the Patient Demographics and Exam. The Worklist for Demographic Documents Requiring Review is included. • Republished: 6/17/22 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Web Registration: Completing and Importing Data</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Web Registration: Completing and Importing Data' was added. • It can be found under the following Program: Web Reg. • Course Description: Review the patient registration process and how to import registration data into your software. • Published: 6/7/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > NEW: Web Registration: Setup and Project Steps</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Web Registration: Setup and Project Steps' was added.

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	<ul style="list-style-type: none"> • It can be found under the following Program: Web Reg. • Course Description: Learn how to get started with Web Registration. Includes a function overview, requesting the add-on, project steps and testing recommendations. • Published: 6/7/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Appointment Scheduling</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Appointment Scheduling' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course teaches attendees the basics of Appointment Scheduling: Scheduling, Re-scheduling and Canceling Appointments. • Republished: 6/2/22 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Appointment Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Appointment Setup' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course teaches Clients how to setup and manage Appointment-related Tables. • Republished: 6/1/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: EHR Basics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: EHR Basics' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Compulink Advantage Clients will be introduced to the basics of EHR in this course. Learn how to access EHR, create a layout, EHR Commands, information entry and much more. • Republished: 5/31/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: EHR Basics for Addiction and Psych</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: EHR Basics for Orthopaedic' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course introduces Addiction and Psych clients to the basics of EHR. Clients will learn how to add and edit Patient medical records, EHR Commands and much more. • Republished: 5/31/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: General Table Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: General Table Setup' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course teaches Administrators and Management staff the basics of General Table Setup. • Republished: 5/31/22 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Insurance and Ledger Basics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Insurance and Ledger Basics' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course teaches Insurance and Ledger Basics. • Republished: 5/31/22 - Length: 24 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Miscellaneous Inventory</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Miscellaneous Inventory' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Learn the basics of Inventory Setup, including how to update and

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	<p>maintain the Vendors table and how to add stock items to the Inventory Database.</p> <ul style="list-style-type: none"> • Republished: 6/1/22 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Patient Services and Demographics</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Patient Services and Demographics' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: This course introduces Patient Demographics features. Upon completion, attendees will be able to create and search for a patient record, add insurance information and much more. • Republished: 6/1/22 - Length: 25 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: Spectacle Order Workflow</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Spectacle Order Workflow' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Learn the Spectacle Order Workflow in this course. How to enter a prescription, lens information, charges, orders and much more will be covered • Republished: 6/1/22 - Length: 5 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: System and Financial Table Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: System and Financial Table Setup' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Learn about System Setup default efficiencies and Financial Tables in this Activate with Advantage course. • Republished: 6/1/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: System and Financial Table Setup V12.5 > Greater</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: System and Financial Table Setup V12.5 > Greater' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Learn about System Setup default efficiencies and Financial Tables in this Activate Advantage course. • Republished: 6/1/22 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Activate: To Onboard New Staff</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: To Onboard New Staff' was updated. • It can be found under the following Program: Activate Advantage. • Course Description: Activate Advantage offers an interactive format that is effective for onboarding new staff or as a refresher for all users. • Republished: 6/3/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: Creating Student Accounts In Compulink University</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Creating Student Accounts In Compulink University' was updated. • It can be found under the following Program: eLearning Resources. • Course Description: Review how to configure your Advantage user accounts for Compulink University access. • Republished: 6/7/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.23) Video > UPDATED: EDI Reports & Remittance Viewers</u></p>

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	<ul style="list-style-type: none"> • The Compulink University course 'EDI Reports & Remittance Viewers' was updated. • It can be found under the following Program: Billing: Insurance. • Course Description: The EDI Report Viewer helps you manage electronic claims submissions, either direct to a Payor or through a clearinghouse, such as Change Healthcare. • Republished: 6/7/22 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.22) Video > NEW: Adding Patient Insurance</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Adding Patient Insurance' was added. • It can be found under the following Program: Patient Flow. • Course Description: Learn how to add an insurance record with patient and insured information. • Published: 5/26/22 - Length: 17 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.22) Video > NEW: EHR: Spell Check</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EHR: Spell Check' was added. • It can be found under the following Program: EHR: General Info. • Course Description: Review spell checking EHR memo fields. • Published: 5/13/22 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.22) Video > NEW: Web Registration: Reprocess a Registration Record</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Web Registration: Reprocess a Registration Record' was added. • It can be found under the following Program: Web Reg • Course Description: Learn how to requeue a Patient's Registration Record. • Published: 5/26/22 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.21) Video > NEW: Episode of Care Overview</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Episode of Care Overview' was added. • It can be found under the following Program: Patient Flow. • Course Description: This is a brief look at the Episode of Care feature, designed to assist providers with an automated solution for tying individual exam records to a single Episode of Care. • Published: 5/26/22 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.21) Video > NEW: OpenOffice: DMA Table Options</u></p> <ul style="list-style-type: none"> • The Compulink University course 'OpenOffice: DMA Table Options' was added. • It can be found under the following Program: Open (Libre) Office. • Course Description: Review how to use the DMA window and how to create a Table with Table Options. • Published: 5/13/22 - Length: 13 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.21) Video > NEW: OpenOffice: Electronic Signature</u></p> <ul style="list-style-type: none"> • The Compulink University course 'OpenOffice: Electronic Signature' was added. • It can be found under the following Program: Open (Libre) Office. • Course Description: Review the Needs Signature Functionality and options. Includes: Do Not Save Image of Document, E-Fax and signature Update. • Published: 5/13/22 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(12.5.0.21) Video > NEW: Updating To Line Item Posting Ledgers</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Updating To Line Item Posting Ledgers' was added. • It can be found under the following Program: Ledger. • Course Description: This course is essential for anyone planning to upgrade from

Education

Standard to Line Item Posting. It outlines the steps of the update process, reviews the benefits of upgrading and explains the differences between Standard and LIP ledgers. You'll learn what to expect throughout the process and what is expected on your end both before and after updating.

- Published: 5/13/22 - Length: 15 Minutes

(12.5.0.10) Video > NEW: Setting and Collecting a Co-Pay

- The Compulink University course 'Setting and Collecting a Co-Pay' was added.
- It can be found under the following Program: Ledger.
- Course Description: Briefly review how to set a co-pay on a patient's record and the options available for collecting and posting a patient co-pay prior to the charge being posted to the ledger.
- Published: 5/26/22 - Length: 5 Minutes

Appointment

Appointment > Commands

(12.5.0.25) Print > Selected Resource > All > Report Updates

- All 3 report options have been updated: (Request)
 - Chronologically
 - Font
 - The Font max was set to 8pt to allow for more data to merge without having to wrap the text.
 - Data header
 - STATUS – Column renamed to 'S' to save room.
 - REASON – Column width increased for better usability.
 - REMARKS (Cell/Home Ph) – Column renamed to 'REMARKS' to save room.
 - Chronologically w/Open slots
 - Font
 - The Font max was set to 8pt to allow for more data to merge without having to wrap the text.
 - Data header
 - STATUS – Column renamed to 'S' to save room.
 - REASON – Column width increased for better usability.
 - CELL PHONE/HOME PHONE – Column renamed to 'REMARKS' to save room.
 - Alphabetically
 - Font
 - The Font max was set to 8pt to allow for more data to merge without having to wrap the text.
 - Data header
 - LOC – Column removed, as the LOCATION is at the top of the report.
 - S – New column added for Appointment Status Code.
 - REASON – Column width increased for better usability.
 - REMARKS (Cell/Home Ph.) – Column renamed to 'REMARKS' to save room.

(12.5.0.25) Utility > Template > Detail > Search Removed

- In the Template table, click on Detail to open the Detail window for the highlighted Template.

Appointment > Commands

- The Search command at the top was removed, as it is not needed in this table.

Customization

- (12.5.0.24) Screen Builder > Examination > New Hover Menu Option**
 - The new ImageIdentifier 'CHART' was added to allow the user to open a chart from the ellipsis Hover Menu.
 - In Screen Builder, click on a grid.
 - In the Object Inspector, double click on (ThoverCollection) to the right of HoverMenu.
 - When you add an item, enter the Caption (maybe ABC Chart) and in ImageIdentifier, enter the word 'CHART'.
 - You will need to create a Smart Function to tell the software which Chart you want to open. Enter that Smart Function name into the SmartFunction field.

Exam

Exam > General & Display Changes

- (12.5.0.24) Encounter Favorites > Order By ID**
 - The Order By ID can now be used when creating Encounter Favorites. (Request)

Exam > Commands

- (12.5.0.25) Print > Audit Report > New Item Added**
 - If the Provider uses the Utility > Supervisor Batch Sign-off, an Event is written to the Audit Report.
 - Event: EHR No Look Sign Off
 - Data displayed:
 - Added – Date Sign Off was done.
 - Event by (Login ID) at Workstation – EHR No Look Sign Off by ABC at Workstation AB.
- (12.5.0.22) Print > Selected > Display Name in History**
 - When printing a single item from the right side of the 'Print > Selected' window, the Name of the item selected will display on the 'History' tab in the demographics. (Request)
 - When printing multiple items, it will display the number of Encounters and the number of Documents that were selected. Example: 1 Encounter(s) / 2 Document(s).

Exam > E-Rx

- (12.5.0.24) E-Rx > Command (Pharmacy) > New Search Option**
 - When searching for a Pharmacy, you now have the option to use Cross Street. (Request)
 - This data must be contained in the Pharmacy table to be searchable.
 - Compulink receives the Pharmacy data from Surescripts on a daily basis, and then passes it on to the PracticeWatch download for your practice.
- (12.5.0.24) E-Rx > Command (Xmit) > Height and Weight Missing**
 - Upon selecting the 'Xmit' command, the software will verify the patient age, and if they are under 18, it will look to see if the height and weight were documented.
 - If this information is not documented, the following message will display: Height and weight required when patient is under 18 years of age.
- (12.5.0.24) E-Rx > Formulary Check > Automatic Check**

Exam > E-Rx

- Upon selecting the 'E-Rx command, the software will check the status of the new Automatic Formulary field in the Provider table.
- If set to the default Y, it will automatically run the formulary check for the medications.
- If set to N, it will bypass this check.

Exam > Fees

(12.5.0.25) Fees > EHR Auto Fee Posting Window > Bilateral Charges

- When posting bilateral charges, the software will double the Charge field based on the following:
 - Units in table is 1.0
 - Modifier 1 (M1) is 50
- In the EHR Automated Fee Posting window, click on Edit and select M1.
- Select Bilateral Procedure 50.
- Post to the Ledger and the charge will show Units=1 and Amount is double.

Exam > Layouts & Tabs

(12.5.0.24) Tab(s) > EDITED: Dictation

- Tab Name: Dictation
- Tab Label: Dictation
- Lab panel
 - Ellipsis hover menu:
 - Common Labs (V12.5)
 - Opens a 'Select Orders' window with a list of Common Labs to choose from.
 - Check one or multiple and click 'OK'.
 - Records are added to the grid with the following information:
 - Test (name)
 - Lab Order Code
 - Ordered (date)
 - (Ordered) By

(12.5.0.24) Tab(s) > EDITED: HiResMedicationPsych

- Tab Name: HiResMedicationPsych
- Tab Label: Medication
- Lab panel
 - Ellipsis hover menu:
 - Common Labs (V12.5)
 - Opens a 'Select Orders' window with a list of Common Labs to choose from.
 - Check one or multiple and click 'OK'.
 - Records are added to the grid with the following information:
 - Test (name)
 - Lab Order Code
 - Ordered (date)
 - (Ordered) By

(12.5.0.24) Tab(s) > EDITED: HiResSessNoteMH

- Tab Name: HiResSessNoteMH
- Tab Label: Sess Note

Exam > Layouts & Tabs

- Left panel (V12.5)
 - Purpose
 - Contain all of the fields and buttons that are not directly connected to another panel.
 - Quick links
 - Unsigned Charts (V12.5)
 - Opens the worklist: Unsigned Medical Records

(12.5.0.24) Tab(s) > EDITED: HiResSessNotePsych

- Tab Name: HiResSessNotePsych
- Tab Label: Psych Note
- Left panel (V12.5)
 - Purpose
 - Contain all of the fields and buttons that are not directly connected to another panel.
 - Quick links
 - Unsigned Charts (V12.5)
 - Opens the worklist: Unsigned Medical Records

(12.5.0.24) Tab(s) > EDITED: Labs

- Tab Name: Labs
- Tab Label: Lab Tests
- Lab Testing Summary panel
 - Ellipsis hover menu:
 - Common Labs (V12.5)
 - Opens a 'Select Orders' window with a list of Common Labs to choose from.
 - Check one or multiple and click 'OK'.
 - Records are added to the grid with the following information:
 - Test (name)
 - Lab Order Code
 - Ordered (date)
 - (Ordered) By

(12.5.0.24) Tab(s) > EDITED: PopUpDiagnosis

- Tab Name: PopUpDiagnosis
- Tab Label: Diagnosis
- Code field
 - Enter a Code and click the drop-down. If a match is not found in the table, the following Warning will display: 0 Records Found!
- Description field
 - Enter a word or string of words and click the drop-down. If a match is not found in the table, the following Warning will display: 0 Records Found!

(12.5.0.24) Tab(s) > EDITED: PopUpGoalSteps

- Tab Name: PopUpGoalSteps
- Tab Label: GoalSteps
- Step Details field

Exam > Layouts & Tabs

- A Smart Function was attached to the field.
- Double click in the field to display a list of EHR Notes with the sort of UTZDINTRVT.

(12.5.0.24) Tab(s) > EDITED: PopUpGoals

- Tab Name: PopUpGoals
- Tab Label: Goals
- Treatments/Objectives field
 - A Smart Function was attached to the field.
 - Double click in the field to display a list of EHR Notes with the sort of UTZDINTRVT.

(12.5.0.24) Tab(s) > EDITED: See Below

- The changes listed below were made on the following tabs:
 - Tab Name: PopUpBIRP > Tab Label: PopUpBIRP
 - Location – Therapy/Treatment field
 - Tab Name: PopUpCBT > Tab Label: PopUpCBT
 - Location – Therapy/Treatment field
 - Tab Name: PopUpClinical > Tab Label: PopUpClini
 - Location – Therapy/Treatment field
 - Tab Name: PopUpClinicalSum > Tab Label: PopUpClini
 - Location – Therapy/Treatment field
 - Tab Name: PopUpDAP > Tab Label: PopUpDAP
 - Location – Therapy/Treatment field
 - Tab Name: PopUpRehabilitation > Tab Label: PopUpRehab
 - Location – Therapy/Treatment field
 - Tab Name: PopUpSOAP > Tab Label: PopUpSOAP
 - Location – Service Provided field
 - Tab Name: PopUpTherapy > Tab Label: Therapy
 - Location – Service Provided field
- Fields listed above
 - The label to the left of the field displays in red text until an option is picked from the table drop-down, then it will turn black.
 - If the user free-types in the field, the label will not turn black.
 - This is an easy way to identify if the staff is using the drop-down as directed.
 - Regardless of how the data is entered, it will still display in the grid once saved.

Exam > Utility

(12.5.0.25) Utility > Healthcare Maintenance > Access Rights

- You can now control access to this option with the user profile right 'HCM Rules Engine' (Main menu > Utility > System Administrator > Login > Profiles).
- This is per ONC guidelines (Office of the National Coordinator for Health Information Technology).

(12.5.0.24) Utility > Healthcare Maintenance > Resources > Item > Case Sensitive

- The sort order is no longer case sensitive. (Request)
- When adding an item to the table, if the first word is not capitalized, it will ignore case + and sort to the correct spot alphabetically in the table.

(12.5.0.24) Utility > Healthcare Maintenance > Rules > Missing Diagnosis

- The following new Rule was added: Diagnosis Verification.
- This Rule is connected to the Role of Provider.

Exam > Utility

- When signing off on the Exam, if the Role of the person logged in is Provider, and there has not been a Diagnosis entered into the Exam for this date, the following message will display in the HCM window: Enter a diagnosis for today's visit.
- This will help prevent the charges going to the Biller to post, and there is no Diagnosis.

Function

Function > Inventory

- | | |
|--------------------------|--|
| <input type="checkbox"/> | <p>(12.5.0.24) Inventory > Audit > Message Removed</p> <ul style="list-style-type: none">• All output reports will automatically print, so the message confirming that the Operation is Complete will no longer display. |
| <input type="checkbox"/> | <p>(12.5.0.24) Inventory > Batch Adjustments > New Report</p> <ul style="list-style-type: none">• Selecting Output of None or Itemized List now generates a Crystal Report.• Report Header:<ul style="list-style-type: none">• The report header includes the following information:<ul style="list-style-type: none">• LOCATION – Location Code of the office the function is run for• TYPE – Type of Inventory the function was run forReport Detail:<ul style="list-style-type: none">• The report detail includes the same information that was available in the legacy text file:<ul style="list-style-type: none">• LOC – Location Code where stock was adjusted• STOCK # - Stock# assigned to the item• MANUFACTURER – Manufacturer assigned to the Inventory record• NAME – Name assigned to the Inventory record• CATEGORY – Category assigned to the Inventory record• COST – Cost listed on the Inventory record• RETAIL – Retail listed on the Inventory record• QTY – Quantity of items adjusted |
| <input type="checkbox"/> | <p>(12.5.0.24) Inventory > Location Transfer > New Report</p> <ul style="list-style-type: none">• Selecting Output of None or Itemized List now generates a Crystal Report.• Report Header:<ul style="list-style-type: none">• The report header includes the following information:<ul style="list-style-type: none">• LOCATION FROM – Location Code of the office the Inventory item was transferred from• LOCATION TO – Location Code of the office the Inventory item was transferred to• TYPE – Type of Inventory the function was run forReport Detail:<ul style="list-style-type: none">• The report detail includes the same information that was available in the legacy text file:<ul style="list-style-type: none">• STOCK # - Stock# assigned to the item• MANUFACTURER – Manufacturer assigned to the Inventory record• NAME – Name assigned to the Inventory record• CATEGORY – Category assigned to the Inventory record• COST – Cost listed on the Inventory record• RETAIL – Retail listed on the Inventory record• QTY – Quantity of items adjusted |

Ledger

Ledger > Charge Window

<input type="checkbox"/>	<p>(12.5.0.24) Charge Window > Co-Pay Calculation Codes</p> <ul style="list-style-type: none">• The patient Co-Pay will post against the following codes:<ul style="list-style-type: none">• 90791 and 90792• 90832, 90834 and 90837• 90846 and 90847• 90875• 90971
<input checked="" type="checkbox"/>	<p>(12.5.0.23) Charge Window > Last Service Date</p> <ul style="list-style-type: none">• The 'Last Service' date in the 'Account Responsible' section of the Demographics will be updated with the posting of ANY Service, not just Office Visits.
<input type="checkbox"/>	<p>(12.5.0.23) Charge Window > Desc Field > F8 Key</p> <ul style="list-style-type: none">• Post Codes in the Fee tables are entered in all caps.• The Post Code in the Desc field at the Ledger may now be typed in lower case letters, and when the F8 key is selected, the software will look for a match in the table in all caps. (Request)• Previous versions would only look for an exact match, so the Post Code had to be typed in all caps in the Desc field to match the table.

Ledger > Commands

<input type="checkbox"/>	<p>(12.5.0.26) Credit > Responsible > Credit Card Payment</p> <ul style="list-style-type: none">• Global Payments Integrated (GPI) is retiring their old platform to provide a more secure application.• All clients using GPI need to update their Compulink software to the latest version build of 12.5.0.26 no later than November 15, 2022.• All clients using GPI need to reach out to Global Payments Integrated once the Compulink software is updated to ensure that your account is reconfigured to work on the new platform.• Clients utilizing a non-compatible card reader need to obtain a new approved device directly from GPI. • Upon saving the payment at the Ledger, a new Charge Through Secure Connection window opens to display the following:<ul style="list-style-type: none">• Total Amount (\$) – Credit amount that was entered at the Ledger• Transaction Type: – CREDITSALE• Card Data – Field to enter the Credit Card number• If using the pin pad, type the number into the field.<ul style="list-style-type: none">• As you start typing, the window changes and displays the following fields for you to enter the data:<ul style="list-style-type: none">• Card Number – This is the same as the Card Data field above.• Expiry – Expiration date of the card (month in the first field and year in the second field).• CVV – Card Verification Value (from the back of the card).• After entering all data, click the Make Payment button.• If using the card reader, swipe the card.<ul style="list-style-type: none">• This contains all of the data, so no need to enter it as with the pin pad.• Once the payment is processed the Transaction Result window opens with the following:<ul style="list-style-type: none">• Primary Response Code• Requested Amount• Approved Amount• Order ID
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Ledger > Commands

- Transaction Type – CREDITSALE
- Bank Approval Code
- Response Message – Displays Approval if completed

(12.5.0.26) Options > Delete Line Item Pmt Dist > Ledger Validate

- After removing the payment distribution and creating the Unapplied Credit, the software automatically validates the Ledger to verify that amounts are correct.
- New message:
 - Highlight the payment and select 'Delete Line Item Pmt Dist'.
 - Click Yes on the following message: Select YES to Confirm deletion of Line Item Distribution for this Credit!
 - Click OK on the new message: Ledger Validation Complete!

(12.5.0.25) Print > Report > ADDED: LIP_ Receipt_ Mtls_ Options

- This is a line item receipt for Materials only. (Request)
- This receipt will display line item Amounts, as well as insurance and Responsible totals for each line item.
- The report prompts the user for the Start Date, End Date, LOCATION, ID, DEPT and Print Future Appts?

Look-up Tables

Look-up Tables > EHR

(12.5.0.26) EHR > Diagnosis > Name > 2023 ICD-10 Codes

- New 2023 ICD-10 Codes were added to the Diagnosis Name table.

(12.5.0.26) EHR > Surgery > Name > New Field

- The field Same Day Service was added.
 - Option to default the Performed date to the current date when adding the Surgery to the Patient Exam record.
 - Default is N when creating a new table record.
 - Change to Y for Surgeries that you perform the same day as ordered.

(12.5.0.26) EHR > Test > Name > New Field

- The field Same Day Service was added.
 - Option to default the Performed date to the current date when adding the Test to the Patient Exam record.
 - Default is N when creating a new table record.
 - Change to Y for Tests that you perform the same day as ordered.

(12.5.0.26) EHR > Treatment > Name > New Field

- The field Same Day Service was added.
 - Option to default the Performed date to the current date when adding the Treatment to the Patient Exam record.
 - Default is N when creating a new table record.
 - Change to Y for Treatments that you perform the same day as ordered.

Look-up Tables > Financial

(12.5.0.26) Financial > Tender Types > Direct Deposit

- The Tender Type Direct Deposit was updated to Direct Deposit/ACH.
- The 1-character Code for this entry in the table should be 'D'.

Look-up Tables > Financial

- This change was made to clearly define the use of the Automated Clearing House (ACH) as an electronic funds-transfer system used for Patient Portal payments.



(12.5.0.24) Financial > Fees > All Charge Tables > Export/Import

- The Options area of the table now has the Export and Import Commands.
- Export
 - Sends the contents of this table to a comma delimited TXT file that may be modified in a 3rd party program such as Microsoft Excel.
 - Click Export and the following message displays: Export data to Fee1.CSV complete!
 - The 1 represents the letter of the table that is exported.
 - FeeS.CSV = Services table
 - FeeM.CSV = Materials/Miscellaneous table
 - FeeX.CSV = Radiology/X-Ray table (product specific)
 - This is the file name you will open and modify in Excel.
- Import
 - Imports a comma delimited file into the displayed table.
 - Click Import and the following message displays: Select YES to Confirm Import of Fee1.CSV
 - The 1 represents the letter of the table that is to be imported (see above).
 - Selecting either No or Cancel will close the Confirm window and nothing imports.
 - Selecting Yes will import the data from the file.



(12.5.0.23) Financial > Plans > Lab Acct. Detail

- The following message will now display when trying to edit the Lab Acct. Detail on a location: Unable to Edit.. use Delete and Add Again!



(12.5.0.22) Financial > Fees > All Charge Tables > Delete

- After accessing the charge table, in the Options window, click Schedules to go to the Fee Schedules.
- The Delete command is now out of development.
- When using the Inherit option to display fees from another schedule, if an item is edited, the Inherited check mark will be removed, and will no longer display fees from the inherited schedule. Example below:
 - Medicaid is set to Inherit the fee schedule from Medicare.
 - On the Medicare fee schedule, the Allowed amount of an item is edited.
 - The Inherited check will go away, as it will now look at the new amount.
- If you would like the item to revert back to displaying the fees from the Inherited schedule, simply highlight the line and click on Delete.
 - Click Yes on the following window: Are you SURE you want to Delete highlighted item AND ALL Detail entries associated with it?
- The fees on the item will now display from the Inherited fee schedule, and the Inherited box will now be checked.

Look-up Tables > General



(12.5.0.24) General > Provider > ADDED: Birth

- A new BIRTH field was added for future development.



(12.5.0.22) General > Location > Details > Mandatory Fax#

- Upon editing or adding a new Location, if the Fax field is left blank, the following message will display: Missing Fax #!
- This was added to assure that updates done to the Location and Provider are being sent to SureScripts.

Look-up Tables > General

- The Fax is also the fail-safe if for some reason the E-Prescribing of an Rx fails.
- If your office does not have a Fax#, you may register for one free one with Updox via the Advantage software.
 - See the Online Help Manual for written instructions.
 - See the 4 minute course in Compulink University: Electronic Faxing Setup > Updox

Patient

Patient > Commands

(12.5.0.24) Search > Advanced Command

- If the staff logged in has a Provider, Staff Group or Location Group assigned in the Login IDs table, the following message will display when clicking the Advanced command:
Advanced SQL Search Unavailable for Users that have Restrictions on which Patients can be Accessed due to Assigned Provider or Staff/Groups! Solution scheduled for availability in version 12.5 next Quarter!

Patient > Layouts & Tabs

(12.5.0.24) Tab(s) > ADDED Provider Dashboard (AI)

- Tab Name: Provider Dashboard (AI)
- Tab Label: Prov Dash

- Appointments panel
 - Displays all of the appointments for the day for the current Login ID.
 - Single left click on a name to be taken to the Exam for that patient.

- Current User Action Items panel
 - ToDos or Action Items related to the person that is logged in to the software.

- Patient Action Items panel
 - ToDos or Action Items related to this particular patient.

- Patient Information panel
 - Displays information for the patient currently selected

- Things To Do panel
 - EHR Docs Requiring Reviewed – Opens Worklist: EHR Documents Requiring Review
 - EHR Not Charged/Signed – Opens Worklist: EHR Records Not Signed/Charged
 - Requires Supervisor Signoff – Opens Worklist: Supervisor Signoff
 - Unsigned Med Recs – Opens Worklist: Unsigned Medical Records

- Things To Know panel
 - E-Rx Needs Attn – Opens Worklist: ERX -Errors
 - E-Rx Refills – Opens Worklist: Erx Pending Refills
 - E-Rx Unattached – Opens utility to connect unattached E-Rx requests
 - Pending Erx – Opens Worklist: Erx – Pending Status
 - Pending Tests – Opens Worklist: Tests Pending Labwork only
 - Portal Messages – Opens Worklist: Portal Messages to be reviewed

(12.5.0.23) Tab(s) > EDITED: Provider Dashboard (PV)

- Tab Name: Provider Dashboard (PV)
- Tab label: Prov Dash

Patient > Layouts & Tabs

- Appointments panel
 - Single left click on a patient in the grid to be taken to their Exam record.

Patient > Utility

- (12.5.0.24) Utility > Appt History > Print > All**
 - When selecting Print > All, a parameter window opens with the choice of Show Filtered Status? (Request)
 - Default is True to include all Appointments, even if the Status is set up to filter off of the schedule.
 - If set to False, those Appointments will not be included in the report.
 - Example:
 - In the Appointment Status table, the Status of Canceled is set to filter off of the schedule.
 - If report option is set to True, all Canceled Appointments are included in the report.
 - If the option is set to False, none of the Canceled Appointments are included.
- (12.5.0.24) Utility > ERX Patient Connect > Display Updated**
 - The window 'Attach Unassigned E-Rx Messages to Patients' now includes the patient's Birth date. (Request)

Reports

Reports > Appointment

- (12.5.0.23) Appointment > Daily > EDITED: Insurance Authorizations**
 - Report changes:
 - Group header
 - Groups by Insurance Payor Name and Payor Code.
 - Payor Code and phone number show in the header only if populated in the patient Primary Insurance record.

Reports > Electronic Health Record

- (12.5.0.26) Electronic Health Record > ADDED: 2022 PI Patient List**
 - This NEW report is similar to the 2021 version. (Request)
 - Measures are quite similar to 2021, but they are segregated into data specific to 2022 Measures.
 - Reminder:
 - The PI Reports mirror what happened in the Quality Reporting and PI Dashboard.
 - To report on an individual clinician's PI outcomes, you must have created a data set for that individual ID in the Dashboard.
- (12.5.0.26) Electronic Health Record > ADDED: 2022 PI Simple List**
 - This NEW report is similar to the 2021 version. (Request)
 - Measures are quite similar to 2021, but they are segregated into data specific to 2022 Measures.
 - Reminder:
 - The PI Reports mirror what happened in the Quality Reporting and PI Dashboard.
 - To report on an individual clinician's PI outcomes, you must have created a data set for that individual ID in the Dashboard.

Reports > Financial

(12.5.0.26) Financial > Acct Management > ADDED: QPP (PQR) Compliance 2022

- This NEW report is similar to the 2021 version.
- Use it to determine your Physician Quality Reporting Percentage for each Measure. (Request)
- Measures included on this report can be found on the Quality Measure tab in your EHR.
- Measures with notable updates for this year include the following: 47, 134 and 181.
- Other notable changes:
 - 2022 Service Year Requirement – This report runs for any date range. CMS will calculate Quality Measures for the entire 2022 service year.
 - Priority Measure Requirements – Additional high priority measures no longer get a bonus as of 2022.
 - QM Percentage – In 2022 this is the sum of top six measures, plus six bonus points if any measure has a non-zero score, divided by 60 as a percentage. If that is more than 100% it is capped at 100%.
- For more information go to: <https://qpp.cms.gov/>

(12.5.0.24) Financial > Analysis > EDITED: RVU Analysis with Modifiers

- This report will only work with Version 12.5 and greater (due to a new RVU table and new Fee tables).
- Parameter/Option changes:
 - Match on Ins. Code Only?
 - This option was removed as there is a new internal RVU table.
 - Start Date (Pot Date) / End Date
 - RVU units are based on the latest entered RVU in the RVU table for the CPT Code, where the Ledger Date of Service is between the RVU Start and RVU End dates.
 - Blank RVU Start Date is set in the report to 12/31/1979 and blank RVU End date is set to 12/31/2099.
- Report changes:
 - The report shows RVU on Service Charges related to the CPT Code, if that is specified in your software.
 - Charges are organized by Charge Type, by Category then CPT Code and Description.
 - RVU table – It is now looking for values in the new RVU table.

Reports > System Admin.

(12.5.0.24) System Admin. > ADDED: Patient Text Messages Audit Log

- Report shows text messages sent to patients. (Request)
- The latest message lists first in the detail.
- Parameters/Options:
 - Start Date
 - Include text messages sent starting from this date.
 - Default is the current date.
 - Single left click the date to use the drop-down arrow to display a calendar.
 - End Date
 - Include text messages sent prior to and including this date.
 - Default is the current date.
 - Single left click the date to use the drop-down arrow to display a calendar.
 - Staff ID
 - Login ID of the staff member logged in when the text message was sent.
 - Default is * for All.

Reports > System Admin.

- Left click in the field to access the drop-down to select an ID, or leave * for all IDs.
- By (D)ate (A)cct (S)taff
 - Select the order in which the data should display.
 - D – Date and time; this is the default.
 - A – Account#, then date and time
 - S – Staff ID, then date and time
- EHR# (0 for All)
 - Option to run for an individual patient or all patients.
 - Default is 0 for all patients.
 - To run for an individual patient, enter their EHR# (from the Exam screen)
- Report (sorted by date/time):
 - Section heading
 - Day of the week
 - Month, day and year
 - Detailed information:
 - Date – Date text was sent
 - Time – Time of day text was sent
 - To – Contains the following items:
 - Acct#
 - EHR#
 - by – Login ID
 - at – Workstation ID
 - Location – Workstation I.P. Address
 - via – How the staff person was logged into the software
 - Text message that was sent
 - Totals
 - Audit Events – Total number of text messages sent

Utility

- | | |
|--------------------------|--|
| <input type="checkbox"/> | <p><u>(12.5.0.24) Patient Registration > Automatic Pull</u></p> <ul style="list-style-type: none"> • PracticeWatch will now start pulling Patient Registration records 1 hour prior to the first appointment scheduled for the day. (Request) |
| <input type="checkbox"/> | <p><u>(12.5.0.24) PracticeWatch Setup > Task (Text) > Increased Characters</u></p> <ul style="list-style-type: none"> • The total number of characters allowed for a text message was increased to 500+. (Request) |

Utility > System Administrator

- | | |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | <p><u>(12.5.0.25) System Administrator > Login > Profiles > HCM Rules Engine</u></p> <ul style="list-style-type: none"> • New functionality was added to the Rule: HCM Rules Engine. • When set to 'None', the user no longer has rights to access Exam > Utility > Healthcare Maintenance. • This is per ONC guidelines (Office of the National Coordinator for Health Information Technology). |
| <input type="checkbox"/> | <p><u>(12.5.0.25) System Administrator > System Setup > System Administrator Tab</u></p> <ul style="list-style-type: none"> • Multi-Factor Authentication ? On <ul style="list-style-type: none"> • Flag to turn on Multi-Factor Authentication. • If checked, all Login IDs require a cell phone number listed in the Phone field in the Login IDs table. |

Utility > System Administrator

- Upon Login of the software, the user is prompted with the following: Please enter the Code sent to your Phone:
- # of Days
 - Number of days between the time that the user is prompted to enter a Multi-Factor Authentication Code.
 - This number is determined by the practice.
 - If left blank, or a zero is entered, users are prompted every time they Log in.
 - If a 3 is entered, users are prompted every 3 days.

(12.5.0.24) System Administrator > Login > IDs > Scribe Functionality

- New functionality for Role of Scribe.
 - When logging in with a Role of Scribe, the user still selects the Provider that they will be scribing for.
 - They will now be allowed to move about patients that are assigned to another Provider.
 - The Today's Appointments grid on the Demographics will only reflect the patients that are connected to the Provider that was selected upon Login.

(12.5.0.24) System Administrator > System Setup > Miscellaneous Tab > New Field

- Appointment Scheduler Section
- Use Category Duration
 - Category templates do not show the duration in minutes marked out on the schedule as time-slots are booked.
 - If you would prefer to see duration markers, check this box, Save and restart the Advantage software.
 - Updating to Version 12.4.0.20
 - In previous versions, it was required to create an APPTCATTIME.CFG file in Notepad and save it in your Advantage product folder.
 - Upon update, the software will look for the file ApptCatTime.CFG in the product folder.
 - If the file is found, the field will populate with 'Y', and the CFG file will be deleted from the product folder.
 - If the file is not found, it will default to 'N'.

(12.5.0.23) System Administrator > System Setup > System Administrator Tab

- PHI Audit Time Period
 - The minimum number was changed to 2 years.
 - If a 1 is entered, the following message will appear:
1 is not a valid value for field PHIYEAR. The allowed range is 2 to 50.

Web Registration

(12.5.0.24) Web Reg > PracticeWatch > Automatic Pull

- PracticeWatch will now start pulling Patient Registration records 1 hour prior to the first appointment scheduled for the day. (Request)

Worklists

(12.5.0.26) Global > ADDED: Denial Claims

- This NEW Worklist allows the user to see all denied claims (sent electronically) and work them directly from the Worklist. (Request)

Worklists

- Upon selecting the Worklist, the user is prompted to enter a SVC LOC (Service Location).
 - Enter a Location Code, or leave blank for All Locations.
 - Click OK.
- The next prompt is to enter a BILLDATE (billed date).
 - Enter the date to include claims billed on or after.
 - Example: To find all denials for claims billed in October, in 10/01/2022.
 - Click OK.
- Items appear in Check# order, followed by CPT Code.
- Fields displayed in the Worklist:
 - Patname– Patient name
 - Payorname – Name of the Payor claim was sent to
 - Check Number – Check number the denial was sent with
 - Code – Code for the reason for the denial
 - Category - All records display REMITTANCE REMARKS
 - Descript – Denial description
 - Amount – All records display 0
 - Cptcode – CPT code on charge that was denied
 - Svc_from – Date of Service
 - Svc_loc - Service Location
- Double click a denial to drill down to the next Worklist level: Denial Claims by Patient.
 - Fields displayed in the Worklist:
 - Patname– Patient name
 - Payorname – Name of the Payor claim was sent to
 - Check Number – Check number the denial was sent with
 - Code – Code for the reason for the denial
 - Category - All records display ADJ REASON
 - Descript – Denial description
 - Amount – Amount of the claim
 - Cptcode – CPT code on charge that was denied
- Double click a claim to be taken to the Ledger with the selected charge in edit mode.
 - Add or Edit Payor Notes as needed.
 - Enter a Last Paid date as needed.
 - The claim filters off of the Worklist.

Security



(12.5.0.22) SecurityAudit > ScribeProvLogUnique

- If a user with the Role of Scribe logs into the software and selects a Provider, the software will add the ScribeProvLogUnique to the SecurityAudit. (Request)
- Example:
 - Julie the Scribe is assigned the LogUnique of 8.
 - Dr. Smith the Provider is assigned the LogUnique of 5.
 - Julie logs into the software and selects to scribe for Dr. Smith.
 - In the SecurityAudit, it will document the following:
 - LogUnique field = 8
 - Before field = 5
- This record is being added at this time, however, the report for displaying the information to the user is still in development.
 - Once the report is completed, it will be delivered to the Advantage software with an update.
 - At that time, the user will have the ability to run the report for dates in the past.

I.T. Specialist Information



(12.5.0.24) Software Configuration File > API Information

- The Advantage software configuration file (config.cbs) will now contain the credentials for any API (Application Programming Interface) that the client has purchased. (Request)
- This will no longer need to be downloaded at the time of the setup of the API.



(12.5.0.24) Software Configuration File > No Need to Restart

- The Advantage software configuration file (config.cbs) now automatically installs, and there is no restart of the Advantage software required.