




Psych Advantage
Version 12.7 Service Pack Enhancements
(Includes Multiple Service Packs)
Document Revised (12/29/2023)

Items listed on this document are the Service Pack Enhancements released with incremental updates between version steps (e.g. V12.7 To V12.8).

Enhancements are presented from newest to oldest within each section.

To the left of each enhancement is the Service Pack that it is available in. Example: 12.7.0.26 means that the enhancement is available in that version build and GREATER.

The current version in distribution is 12.7.0.26. 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 is 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 "**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.  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.

Visit the [Education Page for Psych](#) on the Compulink Client website for additional resources.

For any questions or comments regarding this documentation, please email the Documentation department at: documentation@compulinkadvantage.com

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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Hot Topics

X

(7/28/2023)(12.7.0.24) Help > Knowledge Base Search

- A new Knowledge Base Search option was added to allow users to search Compulink’s internal KB of “How To” items.
- From any screen with the Help icon, click Help and select Knowledge Base Search.
- The following prompt displays: Enter Keywords Separated by Spaces
- Enter your keywords to search for and click ‘OK’.
 - Example: PERFORMED
- A small blue window flashes displaying: Searching Compulink Knowledge Base.....
- Results not found:
 - The following message displays if no results are found: Unable to find any matches to your Keywords at this time! The Knowledge Base is growing daily, so please check back again soon!
- Results found:
 - If results are found, the ‘Select Knowledge Base Item to View Solution’ window opens with a list of items that matched.
 - Information displayed: Description and Modified date.
 - Double click on an item to open the ‘Advantage Education’ window.
 - Subject – The Keywords that were searched
 - First panel – Description of the KB
 - Second panel – KB “How To” information to follow
 - Cancel and Save icons:
 - Click the ‘Cancel’ icon to close the KB window and go back to the search results.
 - Click ‘Save’ to close both the KB window and the search results and go back to the Advantage software.

X

(6/13/2023)(12.7.0.23) General > Data Entry > Right Click Save

- Many areas of the software now have the option to right click to save data. (Request)
 - This was added to reduce mouse movement and speed up documentation.
 - Windows where this functionality is available are identified by the new ‘Save/RC’ icon.
 - You must right click either in an empty space on the panel or the toolbar (avoiding icons).
 - Right clicking in a field gives other options.
 - Examples:
 - Patient – Edit a patient record in the PopUp and right click in an empty space on the panel to save (make sure you are on the panel and not in a field).
 - Exam – Encounter Favorites window, select then right click in empty space.
 - Ledger – Entering a charge, right click in an empty space to save.
- ***With the addition of this feature in the patient Exam, you must use a left click in the panel to bring up the list of commands such as View Encounter Favorite, Assign Normal Values, Forward from Selected Visit, etc.

X

(7/7/2023)(12.7.0.24) General > Data Entry > Right Click Save

Hot Topics

- If the user continues to use the legacy Save icon, they receive the following reminder: Use Mouse Right Click to Demonstrate Efficiency of Saving Changes VERY QUICKLY!
 - Once a week after using the legacy save 5 times the reminder pops up.
- The following message also displays upon exit of the Advantage software (distance calculated per Login): The Screen Cursor has Moved an estimated X MORE FEET by NOT using Right Click Quick Save! Are you SURE you want to Exit ADVANTAGE Software?

X

(6/13/2023)(12.7.0.24) Patient > Portal > Updates

- The following updates were made to the Patient Portal as of 5/26/23:
 - Home icon
 - A new Home (house) icon was added to right side of the top bar.
 - From any other area of the portal, click the Home icon to return to the home page.
 - Patient information
 - The patient name and Location display at the top right.
 - Appointments button
 - This is a new button added to display any upcoming Appointments.
 - Information displayed includes:
 - Provider Appointment is scheduled with
 - Location where Appointment is scheduled
 - Appointment Date
 - Appointment Time
 - Appointment Reason
 - Click 'Show Past Appointments' to display previous Appointment history.
 - Past Appointments display at the top, highlighted in gray.
 - Upcoming Appointments display at the bottom with no highlight.
 - Uncheck 'Show Past Appointments' to go back to only displaying the Upcoming Appointments.
 - My Health Records
 - The 'View' date range only filters the records that are currently displayed.
 - If you select 'Records Older than 30 days' to display a history, you can then use the 'View' to select a specific date range to view of that history.
 - Example: History shows back to 2020, but you only want to view everything from 2022.
- Just a Reminder:
 - If the patient selects My Account > Activity, this could take longer depending upon how long they have been going to the practice.
 - New patients will take seconds, but if the patient has years of information, it could take 5-10 min.

X

(6/13/2023)(12.7.0.24) Patient > Portal > Statement Payments

- Patients now have the option to make a credit card payment through the Patient Portal.
- Patient Statements must be uploaded to the Portal either via the Function or sent manually from the patient Ledger.
- The Patient logs into the portal and goes to the 'Statements' area.
- They click 'Make a Payment', enter their credit card information then click the 'PROCESS TRANSACTION' button.
- Every 30 min, PracticeWatch checks the Portal and downloads payments to the Patient Ledger.

X

(8/9/2023)(12.7.0.25) Look-up Tables > Audit History

- The NEW command 'Audit History' was added to several tables to show a history of changes made to the table. (Request)

Hot Topics

- Highlight the record in the table that you want to view the Audit History for, then click the Audit History command.
- Information displayed:
 - When – Date and time change was made
 - Who – Name of the person logged in when the change was made
 - Action – Action that was taken, such as 'Edit'
- Double click on a line to display the audit field by field changes.
 - Displays field name and information before and after the change.

X

(10/9/2023)(12.7.0.26) Appointment > Provider Web Appointment Viewer

- The Provider Web Appointment Viewer is a quick way for Providers to view their Appointment schedule on-the-go.
- Information is in real time, so the practice MUST be on the Advantage Cloud environment.
- This is for viewing content only and not bi-directional.

- Accessing the Viewer:
 - On your computer or mobile device, go to: advantageprovider.com
 - On the 'Log In' page, enter the information below and click 'Sign-In'.
 - Compulink Account Number – Practice's Compulink Account #
 - User Name – Provider's User name used to log into the Advantage software
 - Password – Provider's Password used to log into the Advantage software
- Selecting Information to View:
 - After signing in, set the information below and click 'Update':
 - Location – Practice Location Code and Name
 - Defaults to the main Location, but you may select a different one.
 - Select 'All' to view Appointments for all Locations.
 - Appointment Date – Date of Appointments you want to view
- Appointment Details:
 - The selected Location and Appointment Date display at the top.
 - Appointments are listed in Time order.
 - Details include:
 - Patient Name - Last, First MI (Nickname)
 - Location Code Appointment is scheduled at
 - Time Appointment is scheduled
 - Reason – Appointment Reason
 - Remarks – Appointment Remarks
 - Due to limited space on a mobile device, you must click the Appointment to view the Remarks.
- Switching Between Views:
 - To view a different Location and/or Appointment Date, select from the drop-downs and click the 'Update' button.
- Signing Out:
 - To sign out of the Web Viewer, click 'Sign Out' at the top.
 - This takes you back to the 'Log In' screen.

X

(10/20/2023)(12.7.0.26) Education > User-Focused > Hover

- Hover over an entry in the 'Select Education Item to Review' window to see hover window displaying the contents of the entry. (Request)
- This is very helpful for reviewing the Education – Video entries prior to selecting them and being taken to Compulink University.

X

(11/1/2023)(12.7.0.26) Login > Location

- If your practice uses the CBSMobile option to prompt the staff to enter a Location upon Logging into the software, the window has been updated.

Hot Topics

- Instead of typing in a Location, a 'Select Location for Mobile User' window opens to display only the Locations that the Login ID is allowed to select from. (Request)
- This is based upon the Location Group Restriction assigned in the Login IDs table.
- If no Restriction is assigned, all Locations display for selection.

Education

- (12/29/2023)(12.7.0.25) Video > NEW: New User Welcome**
 - The Compulink University course 'New User Welcome' was added.
 - It can be found under the following Program: eLearning Resources
 - Course Description: As a new user to Advantage, learn how to access, log in to and view courses within Compulink University, your 24/7 online education portal.
 - Published: 12/22/23 - Length: 3 Minutes
- (12/26/2023)(12.7.0.26) Compulink University > New User Registration**
 - New users added to your Advantage software Login IDs table will receive a 'Welcome to Compulink University' email with their Login credentials.
 - They will also find Compulink 101 courses waiting for them on 'My Learning Track'.
 - Everyone is registered for the 2 courses below, then based on their specialty and position, they are registered for additional courses.
 - Course 1 - New User Welcome
 - Course 2 - Activate: Patient Services and Demographics
 - All auto-registered courses have a due date of 30 days.
- (12/26/2023)(12.7.0.26) Video > NEW: Activate: System and Financial Table Setup**
 - The Compulink University course 'Activate: System and Financial Table Setup' was added.
 - 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.
 - Published: 11/29/23 - Length: 23 Minutes
- (12/26/2023)(12.7.0.26) Video > NEW: Ledger: Print Commands**
 - The Compulink University course 'Ledger: Print Commands' was added.
 - It can be found under the following Program: Ledger
 - Course Description: Review the options found on the Ledger > Print command menu.
 - Published: 12/15/23 - Length: 21 Minutes
- (12/26/2023)(12.7.0.26) Video > NEW: Task Management Setup**
 - The Compulink University course 'Task Management Setup' was added.
 - It can be found under the following Program: Patient Flow
 - Course Description: Learn about the tables supporting the Enterprise Task Management feature. Includes the purpose of each table and how to build entries.
 - Published: 12/15/23 - Length: 11 Minutes
- (12/26/2023)(12.7.0.26) Video > UPDATED: Activate: Miscellaneous Inventory Setup & Functionality**
 - The Compulink University course 'Activate: Miscellaneous Inventory Setup & Functionality' 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 maintain the Vendors table and how to add stock items to the Inventory Database.

Education

	<ul style="list-style-type: none"> • Published: 12/22/23 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > NEW: Task Loc & Staff Group Assignment Control</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Task Loc & Staff Group Assignment Control' was added. • It can be found under the following Program: Patient Flow • Course Description: Learn about the Location and Staff Group Assignment controls related to the Task Management feature. • Published: 12/15/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Adding Patient ToDos</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Adding Patient ToDos' was updated. • It can be found under the following Program: Patient Flow • Course Description: This course explains how to access, add and mark ToDo items complete on your patient accounts. • Published: 12/15/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Create an Encounter Favorite</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Create an Encounter Favorite' was updated. • It can be found under the following Program: EHR: General Info • Course Description: This course will walk through the simple steps of creating an encounter favorite for a specific tab. • Published: 12/15/23 - Length: 6 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Data Mining: Adding an SQL Query</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Data Mining: Adding an SQL Query' was updated. • It can be found under the following Program: Practice Admin • Course Description: Review fields and options when adding an SQL Query. • Published: 12/15/23 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Enterprise Task Management</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Enterprise Task Management' was updated. • It can be found under the following Program: Patient Flow • Course Description: Learn about the Enterprise Task Management feature. • Published: 12/15/23 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Exam Efficiencies</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Exam Efficiencies' was updated. • It can be found under the following Program: EHR: General Info • Course Description: This course shows how to add ultrasound images to a patient's exam. • Published: 12/15/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: Ledger: Alternate Receipt Options</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Alternate Receipt Options' was updated. • 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: 12/15/23 - Length: 17 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: SMART Orders Setup Overview</u></p> <ul style="list-style-type: none"> • The Compulink University course 'SMART Orders Setup Overview' was updated. • 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.

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	<ul style="list-style-type: none"> • Published: 12/15/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(12/18/2023)(12.7.0.26) Video > UPDATED: SMART Orders Window</u></p> <ul style="list-style-type: none"> • The Compulink University course 'SMART Orders Window' was updated. • It can be found under the following Program: EHR: General Info • Course Description: See how the Exam SMART Orders functionality streamlines the selection of Assessments, Plans and Orders, based on your patient's diagnosis. • Published: 12/15/23 - Length: 5 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) 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 introduces Clients to the basics of EHR. Learn how to access EHR, create a layout, EHR Commands, information entry and much more. • Published: 11/29/23 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) 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 • Course Description: This course introduces features related to EHR documentation and functionality. Topics include layouts, icons, shortcuts and government compliance. • Published: 11/29/23 - Length: 21 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) Video > UPDATED: Adding a Patient Contact</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Adding a Patient Contact' was updated. • 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. • Published: 11/29/23 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) Video > UPDATED: EHR Field Edit Level</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EHR Field Edit Level' was updated. • It can be found under the following Program: EHR: General Info • Course Description: Login Profile Right: EHR Field Edit Level. • Published: 11/29/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) Video > UPDATED: EHR: Spell Check</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: EHR: General Info • Course Description: Review spell checking EHR memo fields. • Published: 11/29/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(11/30/2023)(12.7.0.26) Video > UPDATED: Field Definition Command In EHR</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Field Definition Command In EHR' was updated. • It can be found under the following Program: EHR: General Info • Course Description: Quickly find exam field information for custom screens, SQL worklists and Crystal Reports using this new right click option. • Published: 11/29/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(11/16/2023)(12.7.0.26) Video > UPDATED: Ledger: Batch Posting</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Batch Posting' was updated.

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	<ul style="list-style-type: none"> • It can be found under the following Program: Ledger • Course Description: Learn how the Batch Posting feature works for posting charges and payments in a batch format in your patient ledgers. • Published: 11/15/23 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(11/16/2023)(12.7.0.26) Video > UPDATED: Ledger: Collection Accounts</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Collection Accounts' was updated. • It can be found under the following Program: Ledger • Course Description: Explore the Ledger Collection module with efficiency tools designed to manage your overdue patient accounts. • Published: 11/15/23 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(11/16/2023)(12.7.0.26) Video > UPDATED: Ledger: Payor Notes</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Payor Notes' was updated. • It can be found under the following Program: Ledger • Course Description: This brief tutorial presents the Ledger Payor Notes functionality with the companion RCM Insurance Follow-up Worklist. • Published: 11/15/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > NEW: Claim Denials Worklist</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Claim Denials Worklist' was added. • It can be found under the following Program: Billing: Insurance • Course Description: The Denial Claims worklist is an efficiency tool to locate and work all denied claims sent electronically. • Published: 10/31/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > NEW: Instant Messaging</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Instant Messaging' was added. • It can be found under the following Program: Communication • Course Description: Quickly send a message to a staff member or group using Instant Messaging through your Advantage software. Includes the Instant Message Review report for administrators. • Published: 10/31/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > NEW: Intro to Episodes of Care</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Intro to Episodes of Care' was added. • It can be found under the following Program: Patient Flow • Course Description: Briefly review the setup required to utilize the Episodes of Care feature. • Published: 10/31/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > NEW: Order Set Auto Build</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Order Set Auto Build' was added. • It can be found under the following Program: EHR: General Info • Course Description: The Exam Order Set Auto-Build utility automatically creates Order Sets based on the provider's exam documentation history. • Published: 10/31/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > NEW: PracticeWatch: Automating Patient Eligibility</u></p> <ul style="list-style-type: none"> • The Compulink University course 'PracticeWatch: Automating Patient Eligibility' was added. • It can be found under the following Program: PracticeWatch

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	<ul style="list-style-type: none"> • Course Description: Learn how to streamline your Batch Patient Eligibility with PracticeWatch. • Published: 10/31/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(11/2/2023)(12.7.0.26) Video > UPDATED: Patient Messaging</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Patient Messaging' was updated. • It can be found under the following Program: Communication • Course Description: Explore the E-Mail and Text messaging options available under the Patient Print command. • Published: 10/31/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(10/26/2023)(12.7.0.26) Video > NEW: Provider Web Appointment Viewer</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Provider Web Appointment Viewer' was added. • It can be found under the following Program: About Version 12.7 • Course Description: Learn about the new Provider Web Appointment Viewer, a quick way for Providers to view their schedule on-the-go. • Published: 10/13/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(10/26/2023)(12.7.0.26) Video > UPDATED: Appointment Scheduling I</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Appointment Scheduling I' was updated. • It can be found under the following Program: Appointments • Course Description: Learn how to schedule, reschedule, change the schedule view, modify appointment status, cancel and move appointments. • Published: 10/13/23 - Length: 13 Minutes
<input type="checkbox"/>	<p><u>(10/26/2023)(12.7.0.26) Video > UPDATED: Appointment Scheduling II</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Appointment Scheduling II' was updated. • It can be found under the following Program: Appointments • Course Description: Learn about the following Appointment commands: Search, Refresh, Block, Print, Wait List and Daily Notes. • Published: 10/13/23 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(10/26/2023)(12.7.0.26) Video > UPDATED: Appointment Template Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Appointment Template Setup' was updated. • It can be found under the following Program: Appointments • Course Description: Learn about the different template types, how to create a template and how to set up your template schedule. A demonstration of the Move Template utility is included. • Published: 10/13/23 - Length: 29 Minutes
<input type="checkbox"/>	<p><u>(10/20/2023)(12.7.0.26) Video > NEW: PracticeWatch: General Overview</u></p> <ul style="list-style-type: none"> • The Compulink University course 'PracticeWatch: General Overview' was added. • It can be found under the following Program: PracticeWatch • Course Description: This course reviews the table commands, panel details and menu options in the PracticeWatch Dashboard. • Published: 10/13/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(10/20/2023)(12.7.0.26) Video > NEW: What is New in V12.7.0.26</u></p> <ul style="list-style-type: none"> • The Compulink University course 'What is New in V12.7.0.26' was added. • It can be found under the following Program: About Version 12.7 • Course Description: Review enhancements incorporated in V12.7.0.26 including new audits for inventory, new/updated reports and more. • Published: 10/13/23 - Length: 6 Minutes

Education

<input type="checkbox"/>	<p><u>(10/6/2023)(12.7.0.25) Video > NEW: EHR: 2023 Regulatory Compliance Enhancements</u></p> <ul style="list-style-type: none">• The Compulink University course 'EHR: 2023 Regulatory Compliance Enhancements' was added.• It can be found under the following Program: EHR: General Info• Course Description: Review highlights of regulatory compliance enhancements in 2023 that affect exam screens/documentation.• Published: 9/29/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(10/6/2023)(12.7.0.25) Video > NEW: Episodes of Care</u></p> <ul style="list-style-type: none">• The Compulink University course 'Episodes of Care' was added.• It can be found under the following Program: Patient Flow• Course Description: Review the functionality and benefits of the proper set up and use of Episodes of Care.• Published: 9/29/23 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(10/6/2023)(12.7.0.25) Video > NEW: Logging In To Your Advantage Software</u></p> <ul style="list-style-type: none">• The Compulink University course 'Logging In To Your Advantage Software' was added.• It can be found under the following Program: Practice Admin• Course Description: Learn how to log in to your Advantage Software.• Published: 9/29/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(10/6/2023)(12.7.0.25) Video > UPDATED: 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 updated.• It can be found under the following Program: Ledger• Course Description: This course is essential for anyone planning to upgrade from 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: 9/29/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(9/15/2023)(12.7.0.25) Video > NEW: Creating an Exam Order Set</u></p> <ul style="list-style-type: none">• The Compulink University course 'Creating an Exam Order Set' was added.• It can be found under the following Program: EHR: General Info• Course Description: Walk through the steps for creating an Order Set.• Published: 9/14/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(9/15/2023)(12.7.0.25) Video > NEW: Integrated Payment Processing</u></p> <ul style="list-style-type: none">• The Compulink University course 'Integrated Payment Processing' was added.• It can be found under the following Program: Practice Admin• Course Description: Learn about the benefits and workflow of integrated payment processing within your Advantage software.• Published: 9/14/23 - Length: 5 Minutes
<input type="checkbox"/>	<p><u>(9/15/2023)(12.7.0.25) Video > NEW: PracticeWatch: Installation</u></p> <ul style="list-style-type: none">• The Compulink University course 'PracticeWatch: Installation' was added.• It can be found under the following Program: PracticeWatch• Course Description: This course reviews the required administrative rights and installation process for PracticeWatch.• Published: 9/14/23 - Length: 9 Minutes

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<input type="checkbox"/>	<p><u>(9/15/2023)(12.7.0.25) Video > UPDATED: Account Management Tools: Before And After Billing</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Account Management Tools: Before And After Billing' was updated. • It can be found under the following Program: Billing: Insurance • Course Description: Learn about the many tools available to manage your accounts including Reports, Worklists and Payor Notes. • Published: 9/14/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(9/6/2023)(12.7.0.25) Video > UPDATED: Dictionary Utilities</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Dictionary Utilities' was updated. • It can be found under the following Program: About Version 12.7 • Course Description: This course reviews the System Administrator Dictionary Utilities including Table Maintenance, Reindex & Recalculating. • Published: 8/31/23 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(9/6/2023)(12.7.0.25) Video > UPDATED: Functions: Acct. Statements and Overdue Notices</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Functions: Acct. Statements and Overdue Notices' was updated. • It can be found under the following Program: Billing: Patient • Course Description: This course reviews the Account Statement and Payment Overdue Notice functions, defining the options and demonstrating how to run the processes. • Published: 8/31/23 - Length: 15 Minutes
<input type="checkbox"/>	<p><u>(9/6/2023)(12.7.0.25) Video > UPDATED: Insurance Billing: Basic Charge Posting</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Insurance Billing: Basic Charge Posting' was updated. • It can be found under the following Program: Billing: Insurance • Course Description: Learn the proper way to post ledger charges in preparation for Professional claims (CMS1500) Insurance Billing. • Published: 8/31/23 - Length: 19 Minutes
<input type="checkbox"/>	<p><u>(9/6/2023)(12.7.0.25) Video > UPDATED: Patient Billing & Statements Service</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Patient Billing & Statements Service' was updated. • It can be found under the following Program: Billing: Patient • Course Description: Learn how to request, install and set up the Patient Billing and Statements service from Change Healthcare/Optum. Review the process for preparing Recalls and Statements and how to transfer files using the Filezilla software. • Published: 8/31/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(9/6/2023)(12.7.0.25) Video > UPDATED: Scanning in Advantage</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Scanning in Advantage' was updated. • It can be found under the following Program: Patient Flow • Course Description: This course reviews scanning documents in the Patient Demographics, Insurance and Exam. • Published: 8/31/23 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.24) Video > NEW: Ledger: Posting Adjustments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Adjustments' was added. • It can be found under the following Program: Ledger • Course Description: Learn how to post various ledger adjustments using the Adjust or Create Unapplied Payments commands. This includes how to handle overpayments and \$0.00 adjustments.

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	<ul style="list-style-type: none"> • Published: 7/28/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > NEW: What is New in V12.7.0.25</u></p> <ul style="list-style-type: none"> • The Compulink University course 'What is New in V12.7.0.25' was added. • It can be found under the following Program: About Version 12.7 • Course Description: Learn about the 2023 QPP Promoting Interoperability reports, User Grid Menu controls, a new PracticeWatch task scheduling efficiency and more! • Published: 8/16/23 - Length: 11 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) 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. • Published: 8/15/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Activate: Patient Services and Demographics</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 introduces Patient Demographics features. Upon completion, attendees will be able to create and search for a patient record, add insurance information and much more. • Published: 8/15/23 - Length: 25 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Checking in a New Patient</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Checking in a New Patient' was updated. • It can be found under the following Program: Patient Flow • Course Description: Review the steps for checking in a patient including marking their appointment Kept, scanning their insurance card and HIPAA agreement as well as collecting a co-pay. Print a Patient Information sheet to verify their data is current. • Published: 8/15/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Ledger: Collection Setup</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Collection Setup' was updated. • It can be found under the following Program: Ledger • Course Description: Learn what setup is required to support the Collection Tracking module in patient ledgers. • Published: 8/15/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Ledger: Posting Insurance Payments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Insurance Payments' was updated. • It can be found under the following Program: Ledger • Course Description: Walk through different scenarios for posting incoming insurance payments, including how to handle \$0.00 EOBs. • Published: 8/15/23 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Ledger: Posting Refunds</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Refunds' was updated. • It can be found under the following Program: Ledger • Course Description: Learn how to post insurance and account responsible refunds as well as how to properly use the Void Entry and Return commands. • Published: 8/15/23 - Length: 19 Minutes

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<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Ledger: Prepayments and Unapplied Payments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Prepayments and Unapplied' was updated. • It can be found under the following Program: Ledger • Course Description: Learn how to post Prepayments and distribute Unapplied Payments in your patient ledgers. • Published: 8/15/23 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Patient Portal Updates</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Patient Portal Updates' was updated. • It can be found under the following Program: Patient Portal • Course Description: Review the latest updates made to the Patient Portal that coincide with the release of V12.7.0.24/greater. • Published: 8/15/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(8/18/2023)(12.7.0.25) Video > UPDATED: Service Fees Table V12.7</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Service Fees Table V12.7' was updated. • It can be found under the following Program: Tables: Financial • Course Description: Learn how to build and maintain your financial Service Fee table, where your billing codes and fees are stored. • Published: 8/15/23 - Length: 20 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) 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: 7/28/23 - Length: 17 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) Video > NEW: EHR Fee Posting Window: Internal Counts/Logical Values</u></p> <ul style="list-style-type: none"> • The Compulink University course 'EHR Fee Posting Window: Internal Counts/Logical Values' was added. • It can be found under the following Program: EHR: General Info • Course Description: Gain an understanding of where the software is looking in the exam records when 'counting' data points to determine the recommended E&M coding level to charge for. • Published: 7/28/23 - Length: 13 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) Video > NEW: Patient Co-Pay Functionality</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Patient Co-Pay Functionality' was added. • It can be found under the following Program: Ledger • Course Description: Review how to set a per-visit Co-Pay and explore options for collecting and applying Co-Pay payments. • Published: 7/28/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) Video > NEW: What is New in V12.7.0.24</u></p> <ul style="list-style-type: none"> • The Compulink University course 'What is New in V12.7.0.24' was added. • It can be found under the following Program: About Version 12.7 • Course Description: Let's review enhancements available in V12.7.0.24. This includes items added to the software since the initial release of Version 12.7. • Published: 6/13/23 - Length: 11 Minutes

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<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) 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. • Published: 7/28/23 - Length: 18 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) 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. • Published: 7/28/23 - Length: 24 Minutes
<input type="checkbox"/>	<p><u>(8/2/2023)(12.7.0.24) Video > UPDATED: Ledger: Posting Responsible Payments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Responsible Payments' was updated. • It can be found under the following Program: Ledger • Course Description: Learn about each of the Credit > Responsible commands for posting patient/responsible payments to the ledger. • Published: 7/28/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > NEW: Activate: New Client Onboarding</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: New Client Onboarding' was added. • It can be found under the following Program: Activate Advantage • Course Description: This course introduces new clients to Activate Advantage and the Compulink Teams who will be assisting them during the onboarding process. • Published: 7/14/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > NEW: Inventory Tables</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Inventory Tables' was added. • It can be found under the following Program: Inventory • Course Description: This course reviews the Inventory tables including Adjustments, Order Comments, SKU Formulas, Vendors and more. • Published: 7/14/23 - Length: 12 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > NEW: RCM: Daily Pending Claims with Errors Communications</u></p> <ul style="list-style-type: none"> • The Compulink University course 'RCM: Daily Pending Claims with Errors Communications' was added. • It can be found under the following Program: AdvantageRCM • Course Description: New with Version 12.7, the designated RCM contact in your practice will receive daily communications when pending claims with errors exceed \$10.00. • Published: 7/14/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > UPDATED: Client Web Portal Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Client Web Portal Education' was updated. • 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: 7/14/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > UPDATED: DMA Electronic Signature Options and Function</u></p>

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	<ul style="list-style-type: none"> • The Compulink University course 'DMA Electronic Signature Options and Function' was updated. • It can be found under the following Program: Word Processing • Course Description: Review the Needs Signature Functionality and options. Includes: Do Not Save Image of Document, E-Fax and Signature Update. • Published: 7/14/23 - Length: 10 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) 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: Learn about the many education resources available on our client web portal, in Compulink University and in our Online Help file. • Published: 7/14/23 - Length: 22 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > UPDATED: Overview: System Administrator Utilities V12.7</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Overview: System Administrator Utilities V12.7' was updated. • It can be found under the following Program: System Admin • Course Description: Review the utilities located under the System Administrator menu in V12.7/greater. • Published: 6/27/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(7/21/2023)(12.7.0.24) Video > UPDATED: Release Notes & Resources Document</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Release Notes & Resources Document' was updated. • It can be found under the following Program: eLearning Resources • Course Description: Stay in the loop with the Release Notes & Educational Resources Resources document on the Compulink Client Web Portal. • Published: 7/14/23 - Length: 4 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > NEW: 2023 PI Public Health & Clinical Data Exchange Objective</u></p> <ul style="list-style-type: none"> • The Compulink University course '2023 PI Public Health & Clinical Data' was added. • It can be found under the following Program: Govt Compliance • Course Description: Review the measures within the Public Health and Clinical Data Exchange objective. Navigate to the Registries & HIE Interface Request page on the Compulink Client Web Portal. • Published: 6/27/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > NEW: EHR: Real Time Note Update Engine</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Real Time Note Update Engine' was added. • It can be found under the following Program: EHR: General Info • Course Description: Review how the Real Time Note Update Engine works and how note templates are created in your EHR tables. • Published: 6/27/23 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > NEW: MACRA: 2023 PY Changes</u></p> <ul style="list-style-type: none"> • The Compulink University course 'MACRA: 2023 PY Changes' was added. • It can be found under the following Program: Govt Compliance • Course Description: Here's an overview of changes to the MACRA program for the 2023 performance year. • Published: 6/27/23 - Length: 11 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > NEW: Portal: Statements & Patient Payments</u></p>

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	<ul style="list-style-type: none"> • The Compulink University course 'Portal: Statements & Patient Payments' was added. • It can be found under the following Program: Patient Portal • Course Description: Review how to send a statement to the Patient Portal and see how online payments made on the Portal get automatically posted to the ledgers in Advantage. • Published: 6/27/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Activate: Orientation & Product Briefing</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Activate: Orientation & Product Briefing' was updated. • It can be found under the following Program: Activate Advantage • Course Description: This course is an overview of the self-paced eLearning tool for Advantage clients who want a quick and comprehensive implementation. • Published: 6/16/23 - Length: 5 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Control Access with Login Profile Rights</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Control Access with Login Profile Rights' was updated. • It can be found under the following Program: System Admin • Course Description: This course reviews the importance of correctly assigning staff permission in your Login Profiles. It also outlines tips for success to help you get started. • Published: 6/16/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Portal: Access Your Health Information</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Access Your Health Information' was updated. • 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: 6/16/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Portal: Message Your Provider</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Message Your Provider' was updated. • It can be found under the following Program: Patient Portal • Course Description: Learn how to message your provider from within the Patient Portal. • Published: 6/16/23 - Length: 1 Minute
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Portal: Patient Education Resources</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Patient Education Resources' was updated. • It can be found under the following Program: Patient Portal • Course Description: Learn about the videos and online Help available to your patients on the MySecureHealthData sign in page. • Published: 6/27/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Portal: Registration And Logging In</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Registration And Logging In' was updated. • 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: 6/16/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Revenue Opportunity Report</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Revenue Opportunity Report' was updated.

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	<ul style="list-style-type: none"> • It can be found under the following Program: Reports: Financial • Course Description: The Revenue Opportunity Report highlights multiple ways your practice can reduce costs and improve efficiency with Compulink's add-on services. • Published: 6/12/23 - Length: 7 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: Table Edit Controls</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Table Edit Controls' was updated. • It can be found under the following Program: System Admin • Course Description: Review the Table Edit Controls where your system administrator can configure user access at the individual field level. • Published: 6/16/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/29/2023)(12.7.0.24) Video > UPDATED: 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 updated. • It can be found under the following Program: Web Reg • Course Description: Learn how to requeue a Patient's Registration Record. • Published: 6/16/23 - Length: 3 Minutes
<input type="checkbox"/>	<p><u>(6/21/2023)(12.7.0.24) Video > NEW: Login IDs Table</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Login IDs Table' was added. • It can be found under the following Program: System Admin • Course Description: Learn how to create User Login IDs for your staff. This course reviews each of the data entry fields within this table. Version 12.7+. • Published: 6/16/23 - Length: 23 Minutes
<input type="checkbox"/>	<p><u>(6/21/2023)(12.7.0.24) Video > NEW: Login Profile Rights Table</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Login Profile Rights Table' was added. • It can be found under the following Program: System Admin • Course Description: Review the purpose and maintenance of the Login Profiles Table. Version 12.7+. • Published: 6/16/23 - Length: 8 Minutes
<input type="checkbox"/>	<p><u>(6/21/2023)(12.7.0.24) Video > NEW: Medication Management Workflow</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Medication Management Workflow' was added. • It can be found under the following Program: EHR: Psych • Course Description: Review the Advantage tools available in to assist you with managing your client's medications. • Published: 6/16/23 - Length: 14 Minutes
<input type="checkbox"/>	<p><u>(6/21/2023)(12.7.0.24) Video > NEW: Portal: Online Statements & Payments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: Online Statements & Payments' was added. • It can be found under the following Program: Patient Portal • Course Description: Learn how to view your statement and make a payment to your provider's office on the Patient Portal. • Published: 6/16/23 - Length: 2 Minutes
<input type="checkbox"/>	<p><u>(6/21/2023)(12.7.0.24) Video > NEW: Portal: View Appointments</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Portal: View Appointments' was added. • It can be found under the following Program: Patient Portal • Course Description: Quickly view your upcoming and past appointments on the Patient Portal.

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	<ul style="list-style-type: none"> • Published: 6/16/23 - Length: 1 Minute
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Claims: Table Setup & Posting Workflow V12.7+</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Claims: Table Setup & Posting Workflow V12.7+' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Review key look-up tables associated with claims processing, V12.7/greater. Proper setup of the patient's insurance record and posting ledger charges complete the workflow. • Published: 6/1/23 - Length: 20 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Insurance Billing: Expanded Claim Screens</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Insurance Billing: Expanded Claim Screens' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Review the Expanded Claim Screen area in detail, including references to where information appears on the applicable claim form. • Published: 6/1/23 - Length: 21 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Ledger: Options Commands V12.7+</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Options Commands V12.7+' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Learn the functionality of each item on the Ledger Options command menu. • Published: 6/1/23 - Length: 30 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Ledger: Posting Charges I V12.7+</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Charges I V12.7+' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Take a deep dive into the Ledger charge posting screen. • Published: 6/1/23 - Length: 25 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Ledger: Posting Charges II V12.7+</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: Posting Charges II V12.7+' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Learn how to post a Service, Material or X-Ray charge to your patient Ledgers. • Published: 6/1/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: Ledger: View Commands V12.7+</u></p> <ul style="list-style-type: none"> • The Compulink University course 'Ledger: View Commands V12.7+' was added. • It can be found under the following Program: Ledger Posting & Insurance Claims • Course Description: Learn the function of each item on the Ledger View command menu. • Published: 6/1/23 - Length: 16 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > NEW: User Lock-Out And Password Management</u></p> <ul style="list-style-type: none"> • The Compulink University course 'User Lock-Out And Password Management' was added. • It can be found under the following Program: System Security • Course Description: Discover how passwords can be reset, both on-demand options and automated. Learn about User Lock-Out options and how to deactivate User accounts. • Published: 6/1/23 - Length: 9 Minutes
<input type="checkbox"/>	<p><u>(6/1/2023)(12.7.0.24) Video > UPDATED: Inventory: Preparing for an Audit</u></p>

Education

- The Compulink University course 'Inventory: Preparing for an Audit' was updated.
- It can be found under the following Program: Inventory
- Course Description: This course provides the recommended steps to prepare for a successful audit.
- Published: 6/1/23 - Length: 8 Minutes

Appointment

Appointment > Commands

- (5/11/2023)(12.7.0.23) Utility > Reasons > Detail Switch > Location and Staff Control**
 - A second Detail > Switch option for Location and Staff Control was added. (Request)
 - This allows the practice to control which Appointment Reasons are available for scheduling at specified Locations and/or for specified Providers.
 - This filter uses the Location/Provider that was selected for the Appointment, not the Location/Login of the staff making the Appointment.
 - Staff 'ABC' at Location '001' is making an Appointment for Provider 'XYZ' at Location '002'.
 - Appointment Reasons display for the Location Group that '002' is connected to, and/or the Staff Group that 'XYZ' is connected to.
 - Highlight the Appointment Reason and select Detail > Switch.
 - The window at the bottom changes to Multiple Resource Scheduling.
 - Select Detail > Switch again and it changes to Location and Staff Control.
 - Use Detail > Add to connect a Location Group and/or a Login/Staff Group to filter the Reasons.
 - There is also an option to set the Display Order.
- (8/4/2023)(12.7.0.25) Utility > Template Schedule > Calendar**
 - The calendar that was removed in a previous version has been added back in per client request. (Request)

Communication

- (10/9/2023)(12.7.0.26) Instant Message > Access Patient**
 - You now have the option to access the patient Demographics while the Instant Message window is open. (Request)

Customization

- (6/12/2023)(12.7.0.24) Smart Function Editor > ALL > Same Name**
 - When duplicating or creating a new Smart Function and saving, if the same name is found on a visible Compulink-owned entry, the following message displays: Visible SmartFunction with SAME Name Already Exists! Do you want to Continue?
 - Click 'Yes' to save the entry with the same name and automatically check the Hide field on the Compulink-owned entry. (Request)
 - Click 'No' to stay in edit mode and change the name to something that doesn't match a visible Compulink-owned entry.
 - A 'Visible' entry is one that does NOT have the Hide field checked.
 - If the Hide field is checked, it is already hidden and does not display the message.

Data Mining

<input type="checkbox"/>	<p><u>(6/12/2023)(12.7.0.24) Criteria > Detail > Location and Staff Control</u></p> <ul style="list-style-type: none">• A Detail option was added to allow for Location and Staff Control. (Request)• Use Detail > Add to connect a Location Group and/or a Login/Staff Group to filter the Data Mining records.
<input type="checkbox"/>	<p><u>(5/16/2023)(12.7.0.22) Criteria > Display Field List > Number of Fields Increased</u></p> <ul style="list-style-type: none">• The number of fields allowed in the Display Field List was increased from 10 to 40. (Request)• The Crystal Report output was updated to merge the increased number of fields.<ul style="list-style-type: none">• The data wraps around to multiple rows if needed; 10 fields appear on each row.<ul style="list-style-type: none">• Each row has its own alternating row color so each row of data is distinct from the rows above and below it.• If exporting, we recommend selecting Microsoft Excel 97-2000 – Data only (XLS).<ul style="list-style-type: none">• Data exports in one row and may be opened in Excel or LibreOffice.• If the desired final output is a CSV file, we recommend exporting in the above format followed by saving or exporting the data to CSV format.

Exam

Exam > General & Display Changes

<input type="checkbox"/>	<p><u>(5/12/2023)(12.7.0.22) General > E-Rx Pharmacy Selection</u></p> <ul style="list-style-type: none">• Selecting a Pharmacy without an NPI now displays a message. (Request)• If the Pharmacy NPI is missing, the following message displays: Pharmacy Selected is missing necessary IDs to Submit Rx Electronically! Press YES to Confirm Selection!• NOTE: If you use a Pharmacy without an NPI, the Rx will NOT be sent electronically.• This functionality works when selecting from the Patient Demographics, Medication PopUp screen and E-Rx screen.
<input type="checkbox"/>	<p><u>(5/16/2023)(12.7.0.23) General > Supervising Provider</u></p> <ul style="list-style-type: none">• The Provider listed in the 'Supervising Provider' field is now allowed to edit the Exam record even if it has been signed off on by another Provider. (Request)• This is only available on the record with the field populated, not across all records.• Example:<ul style="list-style-type: none">• Provider John Smith selects Janet Steele as the Supervising Provider, completes the Exam and signs off (locking the record).• Provider Janet Steele logs into the software and is able to edit the specific Exam with her listed as the Supervising Provider.• Provider Chris Johnson logs into the software and is NOT able to edit the Exam.
<input type="checkbox"/>	<p><u>(8/22/2023)(12.7.0.25) General > Data Entry > Complaint</u></p> <ul style="list-style-type: none">• The Smart Function that populates the Complaint Narrative Details was updated with the following: (Request)<ul style="list-style-type: none">• Free-type in the beginning of the field:<ul style="list-style-type: none">• The user may free-type in the beginning of the field, and if they click back into one of the individual data fields, it does not overwrite the free-texted information.• Type the information and put a period after.• Example: Free-text. Beginning of next sentence• Free-type in the middle of the data in the field:<ul style="list-style-type: none">• If they type within the data that populated the field, they must have it

Exam > General & Display Changes

- sentence format.
 - The sentence before has a period, then they type their information and put a period after.
 - Example: end of previous sentence. Free-text. Beginning of next sentence
- Free-type at the end of the field:
 - The user may free-type at the end of the field, and if they click back into one of the individual data fields, it does not overwrite the free-texted information.
 - Type the information and put a period after.
 - If you forget, the software adds the period for you after exiting the field.
 - Example: Free-text. Beginning of next sentence
- Updated formatting for commas and spaces:
 - If more than one item is typed in the individual fields with commas but no spaces, when the narrative is built, the spaces are added.
 - Example:
 - Data entry: light,sound,vibration
 - Narrative formatting: light, sound, vibration
- Updated formatting for commas and the word 'and':
 - If more than one item is selected in the individual fields, when the narrative is built, the formatting contains commas and the word 'and' if needed.
 - Example 1: Aggravation is experienced from light and sound.
 - Example 2: Aggravation is experienced from light, sound and vibration.
- This includes the Smart Function that populates the field with information imported from Web Registration.



(6/23/2023)(12.7.0.24) General > Data Entry > Duplicate Diagnosis

- If you try to add a Diagnosis to the Exam that is already listed for that encounter, the following message displays upon exit of the Code field: Unable to Locate Code or Code Already Exists for Encounter!



(8/11/2023)(12.7.0.26) General > Data Entry > Forward to Labels

- Smart Functions used to forward data may now forward to a CBSDBLabel field. (Request)
 - SF.ForwardFieldGroup
 - SF.TabForwardVisitSelect
 - SF.TabForwardLastValue
 - SF.TabForwardLastPositive



(6/23/2023)(12.7.0.24) General > Data Entry > Real Time Note Update Engine

- This functionality is now available in the Diagnosis Assessment and Plans table (Utility > Look-up Tables > EHR > Assessment/Plan > Items). (Request)
- Throughout all available areas, when merging the note into the Exam record, the cursor is placed at the end of the text, allowing the Provider to enter additional information.
- The option to merge an Exam sub-table record was added.
 - This merges the FIRST sub-table record entered for that Exam.
 - Within the note expression, enter [sub-table name.field name]
 - Example: Today we performed the test: [ExamTest.Name].
- The option to prompt for additional items based upon the option selected.
 - Use the ^ to append additional prompts.
 - Example: {Suggested Treatment |rest in dark room|MS|cold compress;massage;OTC Meds^Med Type {OTC Type|Tylenol|MS|Advil;Ibuprofin;} was

Exam > General & Display Changes

prescribed.;}.



(6/23/2023)(12.7.0.25) General > Data Entry > Start Time

- The Exam Start Time no longer defaults to the system time. (Request) 17954
- This allows the user to right click in the field and populate the correct time when starting the Exam.



(8/11/2023)(12.7.0.25) General > Data Entry > Surgery and Treatment

- When attaching a High Risk History item to a Surgery or Treatment, it no longer opens an additional memo field. (Request)
- Data is added to the existing memo field on the PopUp tab and the Provider may enter additional information as needed.



(8/4/2023)(12.7.0.25) General > Data Entry > Surgery, Test and Treatment

- If the 'Same Day Service' box is checked in the Surgery, Test and Treatment tables, the Procedure Status field defaults to 'Completed', otherwise 'Preparation'. (Request)



(10/24/2023)(12.7.0.26) General > Images > Dicom Viewer

- The Advantage Dicom Viewer is used to display images stored within the patient's medical record in either jpeg (.jpg) or bitmap (.bmp) format.
- A new dicomviewer.ini file is added to your Advantage product folder upon update.
 - This is dropped into the ims\tools folder.
- This file allows the user to manage settings for the viewer.
- File contents:

```
[main]
SortChron=false
InitialMaximize=true
InitialRibbonVisible=false
InitialViewMode=single
InitialScale=100
```
- Changing the settings:
 - SortChron – Set to 'true' to sort the images based on their content dates chronologically from most recent to oldest, otherwise set to 'false' to sort oldest to most recent.
 - InitialMaximize – Set to 'true' to maximize the image to full screen upon launching the viewer, otherwise set to 'false'.
 - InitialRibbonVisible – Set to 'true' to show the ribbon of images at the bottom as soon as the viewer launches, otherwise set to 'false' to hide.
 - The ribbon can be opened manually once the viewer is launched.
 - InitialViewMode – Set to 'single' to view one image at a time, otherwise set to 'dual' to view 2 images side-by-side.
 - InitialScale – Set to the scale you want to see the images, like '100', or set to 'fit' to have the images fit to screen.

Exam > Commands



(8/4/2023)(12.7.0.25) Edit > Confirmation Message

- If clicking 'Edit' on an Exam date prior to the current date, the following message displays: Do you REALLY want to Edit an OLD Record? (Request)

Exam > E-Rx



(8/31/2023)(12.7.0.25) E-Rx > Command (Sign) > State Requirements

Exam > E-Rx

- Some states consider certain drugs to be narcotics and some states do not.
- Even if the government says that they are not, it is up to the state.
- The DEA schedules were updated to accommodate this.
- The schedule is based on the Pharmacy where the Rx will be picked up.
- If the state views the medication as a narcotic, it requires the provider to be licensed to prescribe it and sign the Rx. (Request)

(5/12/2023)(12.7.0.22) E-Rx > Review and Xmit > Sign

- For Providers that prescribe schedule drugs, clicking on Review and Xmit automatically takes you to the Sign functionality. (Request)
- In the Review screen, you have the option of Review Only or Review and Xmit.
- Selecting Review Only reviews the medication and takes you back to the E-Rx window where you have to click Sign.
- Selecting Review and Xmit reviews the medication and brings up the two-factor authentication window.
- Click 'Yes' to continue and you are prompted to enter your PIN for the ActivClient Login.
- Once the token PIN is entered, the Rx is transmitted.

Exam > Layouts & Tabs

(8/4/2023)(12.7.0.25) Tab(s) > EDITED: PopUpDiag

- Tab Name: PopUpDiag
- Tab label: Diagnosis
- Description field
 - Type in part of a Diagnosis and open the table.
 - The search looks for a character match at the beginning of a whole word and not in the middle of a word. (Request)
 - Example: Type in 'traumatic'
 - Search finds all Diagnoses with 'traumatic' as an individual word.
 - Search does NOT find Diagnoses with 'nontraumatic' since it starts with non.

(8/18/2023)(12.7.0.25) Tab(s) > EDITED: PopUpGoalSteps

- Tab Name: PopUpGoalSteps
- Tab label: Objective
- Objective Updates panel
 - This is a NEW panel added to the tab for display only.
 - Displays the Progress Updates added via the 'Update Goal Progress' ellipsis hover menu option on the Goals panel.
 - This links progress dates, keeping the original Objective details intact.

(8/18/2023)(12.7.0.25) Tab(s) > EDITED: PopUpGoals

- Tab Name: PopUpGoals
- Tab label: Goal
- Goal Status Updates panel
 - This is a NEW panel added to the tab for display only.
 - Displays the Progress Updates added via the 'Update Goal Progress' ellipsis hover menu option on the Goals panel.
 - This links progress dates, keeping the original Objective details intact.

(8/22/2023)(12.7.0.25) Tab(s) > EDITED: PopUpMedMonitoring

- The Smart Function that populates the memo field was updated with the following:

Exam > Layouts & Tabs

- A space is added after each sentence ending period.
- A space is added after a comma.
- If more than one entry with commas in a field, the last one is replaced with 'and'.

(8/22/2023)(12.7.0.25) Tab(s) > EDITED: PopUpTherapy

- Tab Name: PopUpTherapy
- Tab label: Therapy
- Billing Details panel
 - Ellipsis hover menu
 - Begin Age/Name – Defaults the patient's age and name into the Notes field.

(8/22/2023)(12.7.0.25) Tab(s) > EDITED: See Below

- The change below was made to the following tabs:
 - Tab Name: Complaint, Tab Label: Complaint
 - Tab Name: ComplaintMH, Tab Label: Complaint
 - Tab Name: HiResCompMHNew, Tab Label: Complaint
 - Tab Name: HiResCompROSNew, Tab Label: Complaint
 - Tab Name: HiResSessNoteMH, Tab Label: Sess Note
 - Tab Name: HiResSessNotePsych, Tab Label: Psych Note
- Complaint History panel
 - Ellipsis hover menu – Multi-Add option
 - The Smart Functions attached that opens the windows and creates the 'Auto compiled narrative' memo field when done was updated.
 - A space is added after each sentence ending period.
 - A space is added after a comma.
 - If more than one entry with commas in a field, the last one is replaced with 'and'.

Exam > Orders

(6/9/2023)(12.7.0.24) Orders > Order Details > Display Order

- The Order Detail list displays in the order of the Type of item it is. (Request)
- If the Detail items from multiple Order Sets are displayed, they are grouped by this Type.
- Example: All Medications are grouped together and all Tests are grouped together.
- Standard sort order:
 - Diagnosis
 - Order
 - Test
 - Immunization
 - Treatment
 - Surgery
 - Care Plan
 - Goal
 - Medication
 - Products
 - Education
 - Referral
 - Todo Action
 - Appointment

(8/4/2023)(12.7.0.25) Orders > Order Details > Medication

- When selecting to add a Medication, the window now includes the Sig and Qty.

Exam > Orders



(6/13/2023)(12.7.0.21) Orders > Order Sets > Referral

- You now have the option of adding a Referral Source to the Order Set.
- Highlight the Order Set and select Detail > Add.
- In the 'Select Order Type' window, double click on Referral.
- In the 'Select Item(s)' window, check the box to the left of the Referral Sources you want to attach, then Save.

Exam > Utility



(10/19/2023)(12.7.0.26) Utility > Order Set Auto-Build

- The NEW option 'Order Set Auto Build' was added.
- Once selected, click 'Yes' on the confirmation: Select YES to confirm the Auto-Building of Order Sets based upon 12 months of Previous Usage!
- When complete, click 'OK' on the message: Order Sets have been Created!

General



(5/11/2023)(12.7.0.23) Display > PopUpMessages

- Messages that pop up in the software are now positioned based upon the current location of the mouse on the screen. (Request)
- This was added to reduce mouse movement and increase efficiency.

Inventory



(10/9/2023)(12.7.0.26) All > Audit > New Audits Added

- NEW Audits were added and display on the Extended Audit Report: (Request)
 - Inventory – Add/Edit/Delete Inventory records
 - INVENTORYSTORAGE – Changes made to the Storage area in Misc. Inventory
 - INVENTORYVENDOR – Changes made to the Vendor area in Misc. Inventory
 - Inventory Repairs and Transfers – Add/Edit/Delete Inventory Repair/Loan/Transfer records
 - Inventory Adjustment – Add/Edit/Delete Inventory Adjustment records
 - ORDERS – Add/Edit/Delete Inventory Order records



(8/8/2023)(12.7.0.25) Display > Icons

- For users that choose to display icons and not hover menus, all buttons that were moved to the ellipsis hover menus are now available as icons. (Request)
- These are only available when toggling off the Grid Hover menu by selecting 'Grid Hover Menu' from the Printer & Output Tools icon on the bottom bar.

Ledger

Ledger > General & Display Changes



(12.7.0.26) General > Posting Tax

- After posting an item from Inventory, if the user tries to exit the Ledger without posting the Sales Tax (if applicable), the following message displays: Select OK to Post/Adjust the Outstanding Sales Tax Amount: xx.xx
Exiting the Ledger will not only LOSE the Pending Tax Amount but will also Generate an Audit Record that you SKIPPED the Posting of These Taxes Intentionally! (Request)

Ledger > Charge Window

<input type="checkbox"/>	<u>(10/9/2023)(12.7.0.26) Charge Window > Claim Set > Hover Menu</u> <ul style="list-style-type: none">• The 'New' and 'Copy' options on the ellipsis hover menu are grayed out once they have been selected. (Request)• This prevents the user from creating multiple claim sets on the one charge.
<input type="checkbox"/>	<u>(8/11/2023)(12.7.0.25) Charge Window > Claim Set > Injections and Box 19</u> <ul style="list-style-type: none">• When posting a J Code to the Ledger, Box 19 is automatically populated with the NDC information in the Claim Set.• If you post a different J Code and use the same Claim Set, upon saving, the following message displays: Claim Set Box 19 Replaced with this J Code Info! Should you want multiple J Code info in Box 19 you will need to do that manually!• Click 'OK' to have the new information populate. (Request)
<input type="checkbox"/>	<u>(10/9/2023)(12.7.0.26) Charge Window > Transaction > Global Period</u> <ul style="list-style-type: none">• The software now recognizes CPT Codes beginning with 3, 4 and 5 to return the 'No Global Period' message when posting zero dollar charges. (Request)
<input type="checkbox"/>	<u>(8/4/2023)(12.7.0.25) Payor Notes > No Payor Attached</u> <ul style="list-style-type: none">• When adding a Payor Note, if a Payor is not selected from the drop-down, the following message displays when saving the record: Payor is Missing would you like to Continue to Save? (Request)

Ledger > Commands

<input type="checkbox"/>	<u>(10/9/2023)(12.7.0.26) Batch > Open Existing/Re-Open > See Below:</u> <ul style="list-style-type: none">• Enhancement was made to the Search window field for both the Open Existing and Re-Open commands. (Request)• The field length was increased and now allows the entering of symbols and spaces.
<input type="checkbox"/>	<u>(8/4/2023)(12.7.0.25) Credit > All Options > Apply Button</u> <ul style="list-style-type: none">• When posting a payment in the Line Item Posting environment, the 'Apply' button was removed from the 'Line Item Distribution' window.• With the addition of the option to right click to save, this button was no longer needed.
<input type="checkbox"/>	<u>(8/4/2023)(12.7.0.22) Credit > Insurance > Credit Card Payment</u> <ul style="list-style-type: none">• Some offices are receiving credit card payments from Insurance companies. (Request)• Post these as normal Insurance payments and in the 'Add/Edit/Insert Insurance Payment' window, select a Desc of either 'Credit Card' or 'CC Manual'.• After selecting, you may type an abbreviated version of the Insurance name after the Desc; this allows it to stand out on the Financial reports.• Select the credit card type in the ID/CC field.
<input type="checkbox"/>	<u>(10/9/2023)(12.7.0.26) Service/Material/Miscellaneous/Radiology > Defaults</u> <ul style="list-style-type: none">• The following fields default from the last Appointment the patient was in the office for: ID, From, To and Loc. (Request)

Look-up Tables

Look-up Tables > EHR

<input type="checkbox"/>	<u>(10/13/2023)(12.7.0.26) EHR > Diagnosis > Name > ICD-10</u> <ul style="list-style-type: none">• The latest ICD-10 Codes are installed with the update to Version 12.7.0.26. (Request)
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Look-up Tables > Financial



(6/30/2023)(12.7.0.24) Financial > Coding Rules > Wildcard Option

- When creating Coding Rules, you now have the option to use a wildcard for CPT code.
- In the CPT Code field, enter the required digits to find all CPT Codes beginning with those digits.
 - Example 1: Enter 736 to find all CPT Codes beginning with '736'.
 - Example 2: Enter 73 to find all CPT Codes beginning with '73'.
- The SQL must also be updated in the remaining fields to look for the wildcard and not the full code.
- Here is an example of SQL you may enter into the Units field:
 - IIF((SELECT Count (*) FROM ExamTest WHERE ExamUnique=:EXAMUNIQUEPARAM AND postcode LIKE '736%' AND Side ='B')>0, '2','1')
 - The wildcard: postcode LIKE '736%'
 - An exact match for the full code: postcode='73620'



(8/4/2023)(12.7.0.25) Financial > Electronic Payment > ADDED: See Below

- Password
 - Password provided by CardSmart for this Merchant ID.
- Username
 - Username provided by CardSmart for this Merchant ID.

Look-up Tables > General



(9/6/2023)(12.7.0.25) General > Tasks > Definition > Location/Staff Group Assignment

- A NEW option Location/Staff Group Assignment Control was added.
- This allows the user to control which staff is assigned Tasks based upon their Location and/or Staff Group. (Request)

Here is an example of setup/functionality using just one Task and Task Group:

- Tasks > Definition Table:
 - Create Task
 - Name: Verify Lab Results
 - Staff Group: Back Office Staff
 - Add Detail Records
 - Highlight the Task and select Detail > Add.
 - Location Group – Location Group the user that prompts the addition of the Task is associated with.
 - It is recommended to select either a Location Group or a Staff Group, not both.
 - Staff Group – Staff Group the user that prompts the addition of the Task is associated with.
 - It is recommended to select either a Location Group or a Staff Group, not both.
 - Assigned Staff Group – Staff Group the Task is assigned to.
 - It is recommended to select either an Assigned Staff Group or an Assigned Department Group, not both.
 - Assigned Department Group – Department Group the Task is assigned to.
 - It is recommended to select either an Assigned Staff Group or an Assigned Department Group, not both.
 - Detail Record 1:
 - The Staff Group selected is 'Provider Demo' and the Assigned Staff

Look-up Tables > General

- Group selected 'DRD-Back Office Staff'.
 - Detail Record 2:
 - The Staff Group selected is 'Provider Smith' and the Assigned Staff Group selected is 'MVS-Back Office Staff'.
- Tasks > Groups Table:
 - Create a Task Group
 - Name: Blood Work
 - Add Detail Records
 - Highlight the Task Group and select Detail > Add.
 - The Task selected is 'Verify Lab Results'.
- Test > Name Table:
 - Create a Test Name, or use an existing one.
 - Name: CBC w/o Diff w/ Plt
 - Add Detail Records
 - Highlight the Test Name and select Detail > Add.
 - The Task Group selected is 'Blood Work'.
- Patient Exam:
 - Scenario 1:
 - Log in as 'Provider Demo' and order the Test 'CBC w/o Diff w/ Plt'.
 - The Task 'Verify Lab Results' is added and assigned to Staff Group 'DRD-Back Office Staff'.
 - Scenario 2:
 - Log in as 'Provider Smith' and order the Test 'CBC w/o Diff w/ Plt'.
 - The Task 'Verify Lab Results' is added and assigned to Staff Group 'MVS-Back Office Staff'.
 - Scenario 3:
 - Log in as 'Provider Jackson' and order the Test 'CBC w/o Diff w/ Plt'.
 - The Task 'Verify Lab Results' is added and assigned to Staff Group 'Back Office Staff'.
 - Because 'Provider Jackson' is not part of the specified Staff Groups attached to the Task Definition, it assigns the Task to the default Staff Group established on the Task Definition record.

Patient

Patient > General & Display Changes

- | | |
|--------------------------|--|
| <input type="checkbox"/> | <p><u>(6/13/2023)(12.7.0.24) Display Change(s) > User-Owned Tabs</u></p> <ul style="list-style-type: none"> • User-Owned tabs display with the tab name underlined. (Request) |
|--------------------------|--|

Patient > Commands

- | | |
|--------------------------|---|
| <input type="checkbox"/> | <p><u>(8/4/2023)(12.7.0.25) Document > Import > File Types</u></p> <p>When importing a document, the file types .TIF and .TIFF were added. (Request)</p> |
| <input type="checkbox"/> | <p><u>(8/4/2023)(12.7.0.25) Edit > Merge > Default Date</u></p> <ul style="list-style-type: none"> • When merging patient accounts and prompted to enter the current date, the date field defaults to the current date minus 60 days. (Request) |
| <input type="checkbox"/> | <p><u>(10/9/2023)(12.7.0.26) Recall > Provider ID Default</u></p> |

Patient > Commands

- When adding a Recall, the ID field defaults to the Provider listed in the Demographics. (Request)

Printer & Output Tools

- (10/9/2023)(12.7.0.26) Workstation Configuration > Automatically Update**
 - You no longer have to exit the Advantage software after making a change to the Workstation Configuration. (Request)

Reports

Reports > General Changes

- (8/4/2023)(12.7.0.25) General > Double Click in Parameters**
 - Double clicking in non-date Parameter fields no longer opens a table; use the single click on the drop-down to select.
 - Double click in a date field to open a calendar to select from.
- (8/11/2023)(12.7.0.25) General Changes > Full Page Default**
 - When the Crystal Report opens on the screen, you can click the button to maximize the window.
 - If you close out of that report and run another report, it automatically opens in the maximized view, saving you from having to click the button.
 - This maximized window stays as the default until you exit and relaunch the software. (Request)

Reports > Appointment

- (6/12/2023)(12.7.0.24) Appointment > Analysis > EDITED: Statistics**
 - Parameter/Option changes:
 - Appt Status (sep by comma)
 - This Parameter/Option was updated to allow for multiple Status Codes. (Request)
 - Codes must be separated by a comma (Example: O,R)

Reports > Electronic Health Record

- (8/4/2023)(12.7.0.25) Electronic Health Record > ADDED: 2023 PI Patient List**
 - This NEW report is similar to the report for 2022. (Request)
 - Prior to running the report, you must run one of the following:
 - Patient > Exam > MACRA > Quality Reporting and PI Dashboard
 - Utility > Quality Reporting and PI > Populate Report Data
 - 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.
- (8/4/2023)(12.7.0.25) Electronic Health Record > ADDED: 2023 PI Simple List**
 - This NEW report is similar to the report for 2022. (Request)
 - Verify the Provider record has the following settings:
 - MU (PI) Participation = Y
 - MU (PI) Stage = 3

Reports > Electronic Health Record

- MU (PI) Year = 2023
- Prior to running the report, you must run one of the following:
 - Patient > Exam > MACRA > Quality Reporting and PI Dashboard
 - Utility > Quality Reporting and PI > Populate Report Data
- 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

(8/4/2023)(12.7.0.25) Financial > Acct Management > EDITED: A-R SNAPSHOT

- Parameter/Option changes:
 - View Active Accts Only? (Request)
 - This is a NEW Parameter/Option added.
 - Option to exclude closed/inactive accounts.
 - Default is 'False' to include both active and inactive accounts.
 - Set to 'True' to exclude archived records, closed accounts and inactive patients.
 - Archived records – Done with the Maintenance utility
 - Closed accounts – Done from Ledger > Options > Close
 - Inactive patients – Patient Demographic Active field NOT checked
- Report changes:
 - The 'Page of Page' now merges at the bottom of the report. (Request)

(8/4/2023)(12.7.0.25) Financial > Acct Management > EDITED: A/R Responsible Snapshot (LIP)

- Parameter/Option changes:
 - Export View?
 - This is a NEW Parameter/Option added.
 - If set to 'True', this displays a stripped down version of the report that is cleaner when exported to other programs such as Excel.
 - Default is 'False'.
- Report changes:
 - If Export View? Set to 'True', page 1 includes instructions for export.

(10/9/2023)(12.7.0.26) Financial > Acct Management > EDITED: Accounts Receivable

- Parameter/Option changes:
 - ID (Provider)
 - Drop-down accesses the Provider table. (Request)
- Report changes:
 - The 'Page of Page' now merges at the bottom of the report. (Request)

(10/9/2023)(12.7.0.26) Financial > Acct Management > EDITED: Accts Receivable by Service Loc

- Report changes:
 - The 'Page of Page' now merges at the bottom of the report. (Request)

(8/9/2023)(12.7.0.25) Financial > All > ADD ID (Posting Login)

- Change made to any report with the Parameter/Option to run for ADD ID (Posting Login).
- The drop-down now accesses the Login ID's table to select from. (Request)

Reports > Financial

- (8/11/2023)(12.7.0.25) Financial > Analysis > EDITED: RVU Analysis with Modifiers**
 - Report changes:
 - The grouping by Description was replaced with grouping by CPT Code. (Request)
 - If there are 2 charges with the same CPT or HCPCS Code, but they have different descriptions, they are grouped under the Code.

Reports > System Admin.

- (10/9/2023)(12.7.0.26) System Admin. > ADDED: Fax Status Report via Updox**
 - This is a NEW report. (Request)
 - The report displays the status of all faxes sent through a specified date range to Updox, our electronic fax partner.
 - Faxes in the report are divided into several sections: Failed, Pending, Cancelled, and Completed.
 - If a section does not appear on your report, it means there were no faxes that fall under that category for the selected period (or, in the case of Cancelled, it was disabled using the Hide Cancelled parameter).

Utility

- (8/4/2023)(12.7.0.25) PracticeWatch Setup > Execution Order**
 - A NEW option 'Execution Order' was added to allow the user to schedule more than one Task to start at the same time, while controlling the order in which they run.
 - Example:
 - Schedule 2 Reports to run at 10:00 PM.
 - After saving, double click on each one to designate the Execution Order.
 - Report A = 1 and Report B = 2
 - Report A runs/completes, then Report B starts
- (8/9/2023)(12.7.0.25) PracticeWatch Setup > Schedule Quarterly**
 - When scheduling a task to run, you now have the option to select Quarterly. (Request)

Utility > Miscellaneous Utilities

- (10/9/2023)(12.7.0.26) Miscellaneous Utilities > Other Utilities > Moved to Utility SQL Scripts**
 - Options previously found under Other Utilities were moved to Utility > System Administrator > Dictionary Utilities > Utility SQL Scripts.

Utility > System Administrator

- (8/4/2023)(12.7.0.25) System Administrator > Dictionary Utilities > Re-Index/Recalculate in Bulk > All Users Out**
 - All users MUST be out of the software to run this utility.
 - Unlike previous versions, you no longer have to stop services such as PracticeWatch, HL-7 APR, FHIR.
 - The following warning message displays upon accessing the utility and you must select either 'Yes' or 'No':
Bulk ReIndex/ReCalc Operation Requires ALL USERS out of Software!
This operation should ONLY BE USED IN EXTREME CASES where a backup is not available and, due to file corruption, a Complete ReIndex/ReCalculation is necessary.

Utility > System Administrator

Is this one of those EXTREME CASES?

<input type="checkbox"/>	<p><u>(8/4/2023)(12.7.0.25) System Administrator > Dictionary Utilities > Re-Index/Recalculate in Bulk > Changes</u></p> <ul style="list-style-type: none"> • The 'Options' command was removed as data is accessed from the Level drop-down. • The 'Index Only' field was removed as all Levels are now run as full (as if Index Only was not checked). <ul style="list-style-type: none"> • To run ReIndexing, select the Utility ReIndex Individual Table. • The Level of 'Complete' was changed to 'ReIndex All Tables/Rebuild Dictionary • The Level of 'Ledger Related ONLY' was replaced with 'ReCalc All (ledger, Inventory, AP, etc)' and includes the following: <ul style="list-style-type: none"> • Indexing TABLEDEFINITION Database • Indexing INDEX Database • Indexing TMASTER Database • ReCalculating Ledger • Checking Table Unique Values • Checking Balance & Invoices for all Payable Accounts • Checking Accuracy of Outstanding Orders • Outstanding Order Fix Count: • Verifying each patient has an account • Verifying each Account has correct # of patients • ReIndexing/ReCalculate Completed
<input type="checkbox"/>	<p><u>(8/4/2023)(12.7.0.25) System Administrator > Dictionary Utilities > Re-Index/Recalculate in Bulk > PracticeWatch</u></p> <ul style="list-style-type: none"> • Every Sunday, PracticeWatch runs an algorithm based on how often the tables are used. • The ReIndex/ReCalculate in Bulk is run on 30 of these files each week. (Request) • As users delete records and add new ones, the size of the index files increase. • Running the ReIndex/ReCalculate utility rebuilds the index, puts everything in order and removes deleted records, therefor providing a smaller index file. • The smaller file is easier to access and manage by the operating system and Advantage Database Server and results in peak performance.
<input type="checkbox"/>	<p><u>(10/9/2023)(12.7.0.26) System Administrator > Dictionary Utilities > Utility SQL Scripts > ADDED: See Below</u></p> <ul style="list-style-type: none"> • Entries are now alphabetically sorted by Name. (Request) • NEW SQL Script 'EDI: Cleanup Old Insurance Billed and Paid Dates' was added. (Request) <ul style="list-style-type: none"> • This was moved from Other Utilities and renamed from: Clean-up Billed Dates. • NEW SQL Script 'Provider ID Change' was added (Request) <ul style="list-style-type: none"> • This was moved from Other Utilities and renamed from: Change Provider ID.
<input type="checkbox"/>	<p><u>(10/9/2023)(12.7.0.26) System Administrator > Login > IDs > Role</u></p> <ul style="list-style-type: none"> • The label for 'Role' was changed to 'Primary Role'. (Request) • This was done in preparation for the NEW Detail option to connect Additional Roles. • This portion is still in development.
<input type="checkbox"/>	<p><u>(10/9/2023)(12.7.0.26) System Administrator > Login > Profiles > Rights > Added: See Below</u></p> <ul style="list-style-type: none"> • The NEW Right 'PHI Patient/EHR Audits' was added for future development.
<input type="checkbox"/>	<p><u>(8/9/2023)(12.7.0.24) System Administrator > System Setup/Configuration > ADDED: Audit History</u></p>

Utility > System Administrator

- The NEW configuration utility 'Audit History' was added to show a history of changes made under the System Setup/Configuration area. (Request)
- Information displayed:
 - When – Date and time change was made
 - Who – Name of the person logged in when the change was made
 - Table – Table name where action was taken; Example: MASTER. (Request)
 - Action – Action that was taken, such as 'Edit'
- Double click on a line to display the audit field by field changes.
 - Displays field name and information before and after the change.

Worklists

- (9/6/2023)(12.7.0.25) Global > EDITED: Claim Edit Errors Worklists**
 - Double click on a record in the Worklist to open a window to allow full view of the error for ease of correcting issues. (Request)
- (8/16/2023)(12.7.0.25) Global > EDITED: RCM: Insurance Follow Up**
 - The Worklist now ignores any item with a follow up date in the future. (Request)
- (8/18/2023)(12.7.0.25) Global > REMOVED: ABB Catalog Lookup Failure**
 - The Worklist 'ABB Catalog Lookup Failure' was removed as is it no longer needed.
- (7/6/2023)(12.6.0.16) Global > ADDED: Denial Claims**
 - Allows the user to see all denied claims (sent electronically) and work them directly from the Worklist.

I.T. Specialist Information

- (8/24/2023)(12.7.0.25) Auto Diagnostics > Function Change**
 - The option to set up Auto Diagnostics was removed for Cloud-based clients, as PracticeWatch now automatically runs the ReIndex/ReCalculate in Bulk on selected files every Sunday.