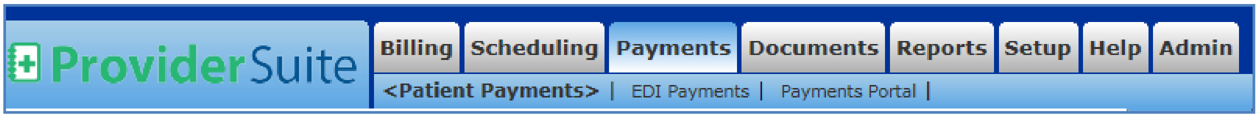
Contents

New or Updated Features

PBI 24: Added Payments tab with Patient QuickPay Option



A new ‘Payments’ tab appears between the ‘Scheduling’ and ‘Documents’ tab. If those tabs are not present on an account, the ‘Payments tab’ will appear to the right of the ‘Billing’ tab.

The new Payments tab serves as the home for Patient Payments, EDI Payments, and a link to a future online Payments Portal.

Payments Tab Admin Settings

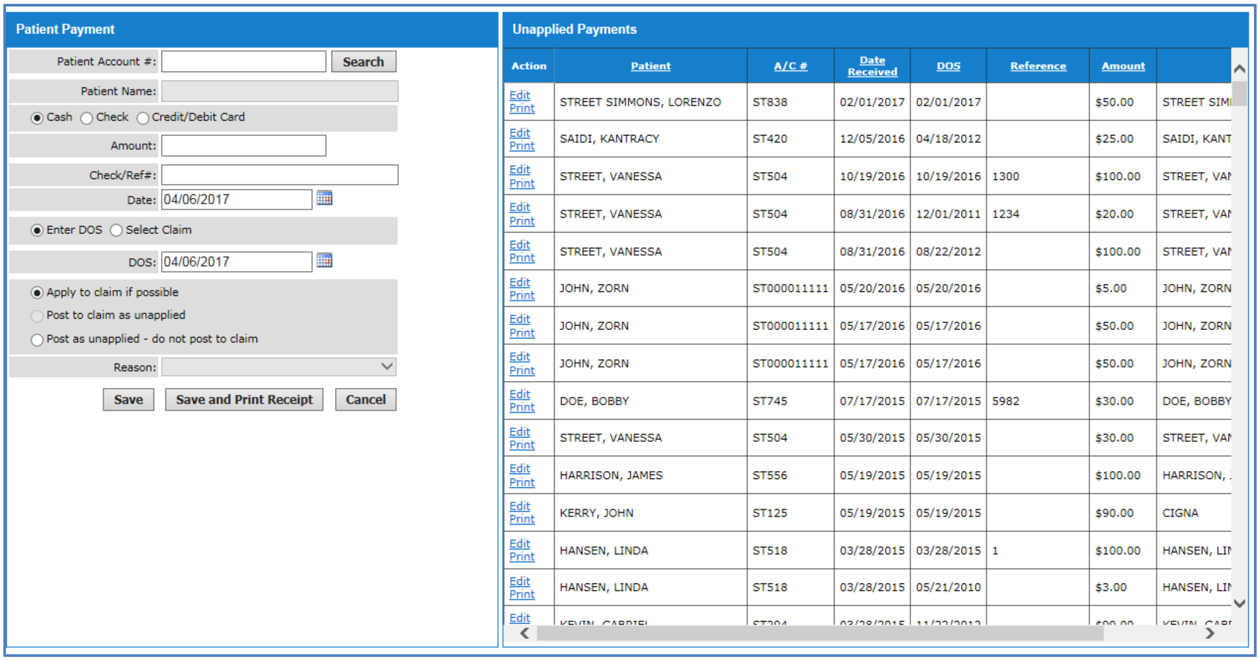
From Admin>Account Set-up you can configure how the new tab is displayed for a selected account. The three options are:

Enabled - (selected by default for all new and current accounts) – Option shows the ‘Payments’ tab and its sub-tabs.
Displayed - Option shows the tab and displays the default marketing text pop-up when clicked.
Hidden – This option removes the tab for the selected account.

The new ‘Payments’ tab has three sub-tabs – Patient Payments, EDI Payments and Payments Portal.

Patient Payments sub-tab

Patient Payments sub-tab in ProviderSuite web app is re-created from the features of Billing Manager> Accounting> Patient Payments. This new workflow eliminates the step of launching the Billing Manager applet for users who need to post patient payments at the time of service. This feature is still available within the Billing Manager applet for users who wish to continue posting patient payments through that module.



Patient Account # - Enter either the patient's account number and click > Tab to or click on the Search button to search for the required patient using last name, first name, SSN, DOB, state, A/C#, Other A/C#, or Chart #.

Patient Name –Read only text field which will populate based on active patient.

Payment Type -

Cash - Select cash when a cash payment is collected.

Check - Select check when a check is collected from the patient. In the **Check/Ref#:** field enter the check number.

Credit/Debit Card - Select credit/debit card if a card is used to make the payment.

Amount - Enter the amount of the patient payment.

Check/Ref# Enter a check number or the reference number for this payment.

Date - Defaults to the current date. Use the calendar control or type in the field to change the date.

Enter DOS - Select to enter a payment by DOS.

DOS - Defaults to the current date. Use the calendar control or type in the box to change the date as needed.

Select Claim - Changes the available option and allows user to select from a drop- down list of claims with an open balance. To select any claim, regardless of balance, select > All Claims.

Apply to claim if possible -This option posts the payment against any claim with the same DOS.

Post to claim as unapplied - Patient payment is posted against the claim but still displays as unapplied payment.

Post as unapplied – do not post to claim - Patient payment is posted against the patient's account and not against an individual claim. This money will stay in the patient's 'unapplied bank' until applied to a claim line.

Save - To commit the details entered. These can be either new or an update to existing patient payments details.

Save and Print Receipt – This action saves the record and display a print dialog box to print the patient's payment receipt.

Cancel – Cancel removes the payment information.

Unapplied Payments section

On the right side of the screen, 'Unapplied Payments' grid displays all unapplied patient payments records for an account.

Action

Edit – will load the unapplied payments under patient payment section where user can edit CheckRef#, Payment Date and DOS.

Print –will prompt the user with print dialog box to print the payment record.

PBI 44: Moved EDI Payments from Billing tab to new Payments tab

The EDI Payments screen has moved from under the Billing tab to the new Payments tab.

PBI 396: Added Payments Portal sub-tab to Payments tab

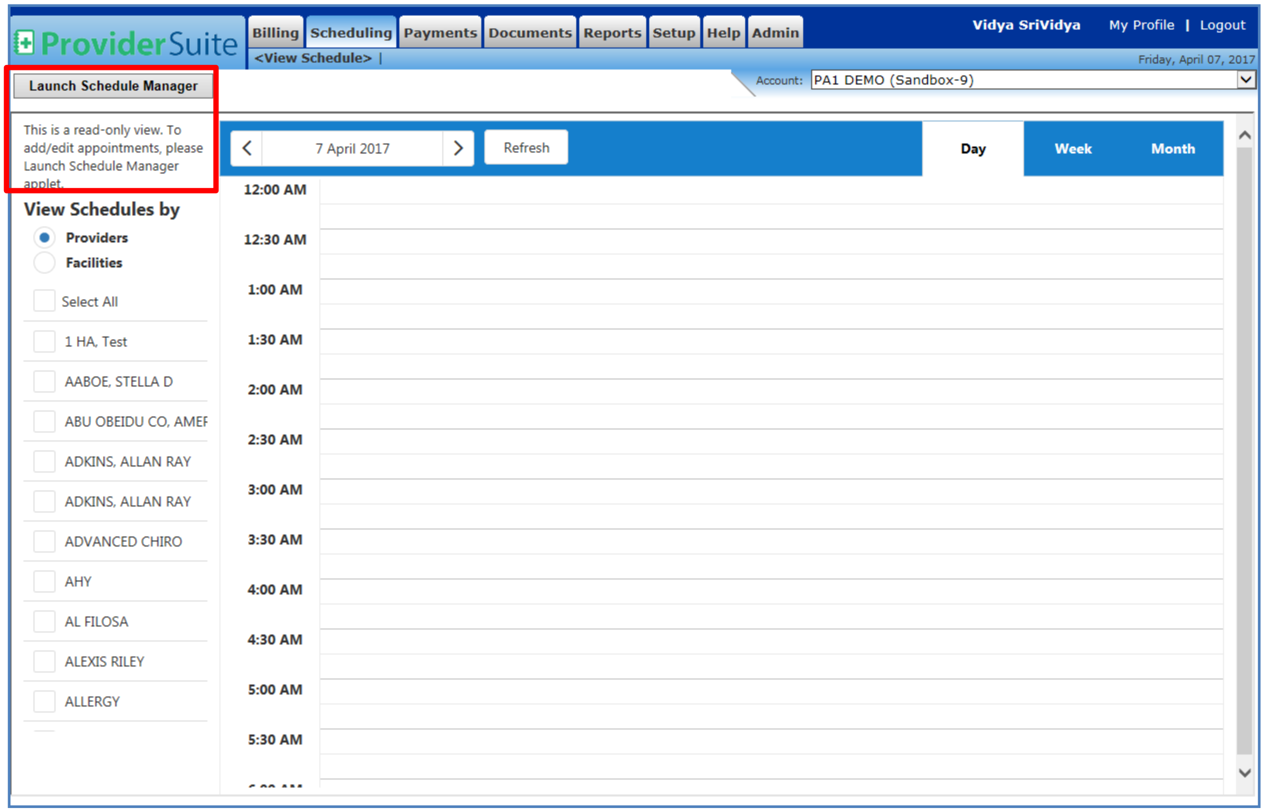
The Payments Portal sub-tab opens an external URL in a new browser window. This sub-tab is the place holder for our upcoming Patient Payments Portal. Currently, the sub-tab resolves to www.practiceadmin.com.

PBI 598: New content and behavior of Scheduling tab

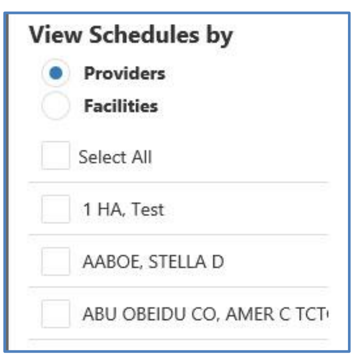
Clicking on the Scheduling tab no longer automatically launches the Schedule Manager applet. Instead a tab is displayed with a new read-only schedule view. Users can still launch the Scheduler Manager applet by clicking the 'Launch Scheduler Manager' button.

In future releases, we will continue to add functionality to fully manage the schedule from the web app. Until then users will need to continue to launch the Schedule Manager applet to access the advanced scheduling features.

PBI 599: Read-only Schedule Viewer



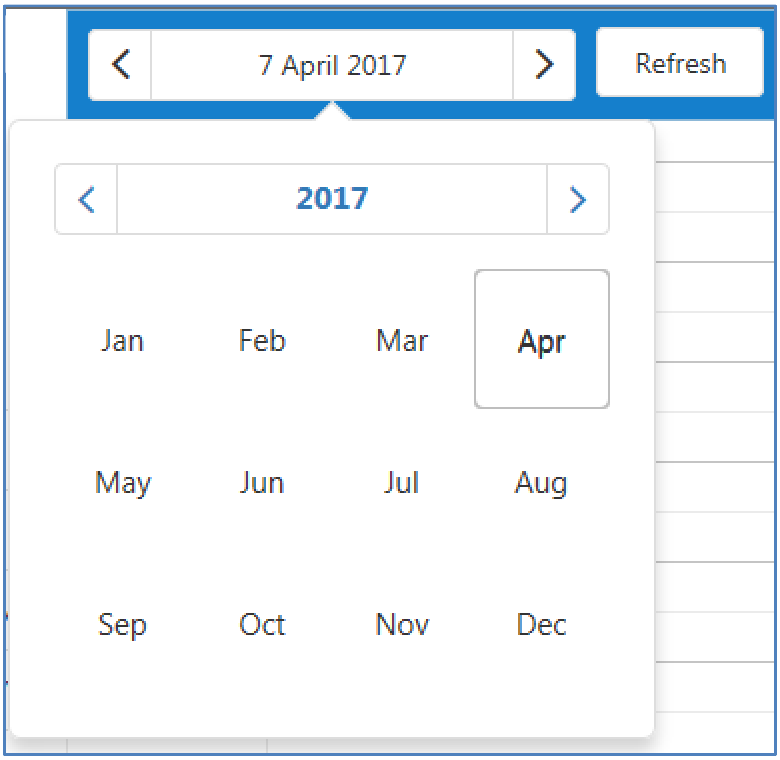
'View Schedules by' will filter the appointments based on 'Providers' or 'Facilities' as selected by the user. User can select entire list by selecting 'Select All' or select individual 'Providers' or 'Facilities' by clicking the box next to the selection.



Time shown on the schedule window is listed in half-hour intervals.

Date Range selector has three views: Day (default), Week and Month

The date picker will allow the users to jump to any date in calendar.

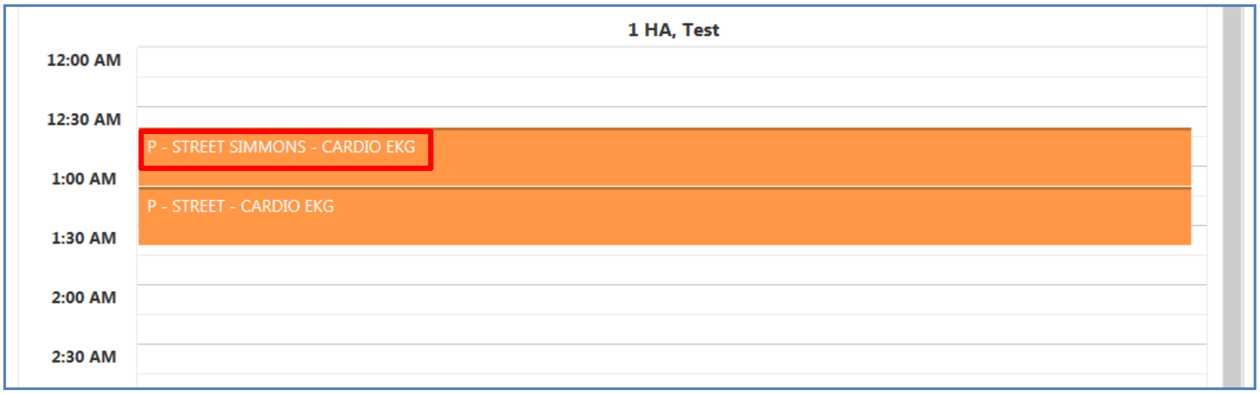


Use the scroll bar to view additional schedules that aren't visible in the current display.

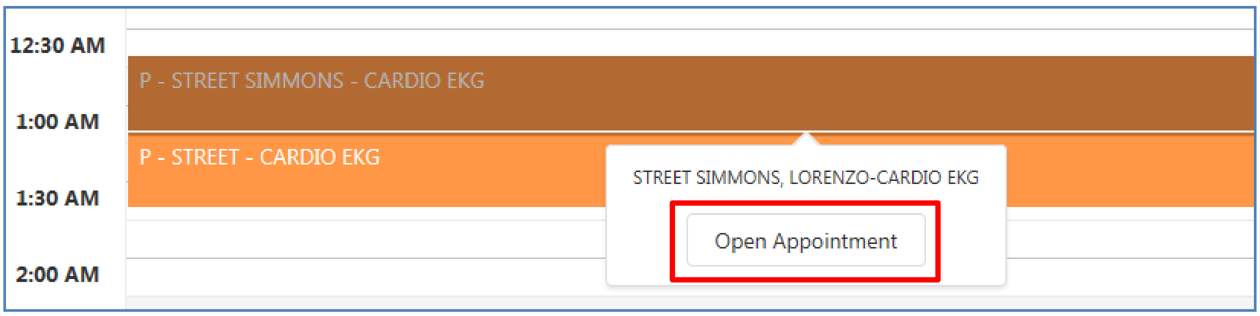
The schedule will auto refresh or you can use the 'Refresh' button to manually refresh the screen.

The appointment details are displayed similarly to Schedule Manager Applet.

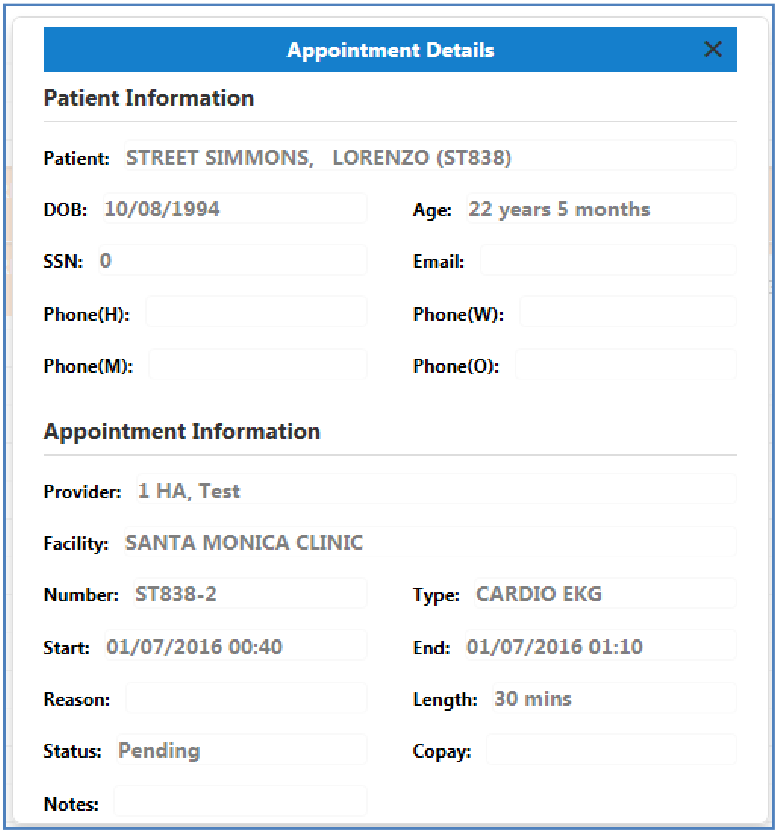
The appointment status, patient last name and appointment type are shown.



On clicking on any appointment, a pop up window is displayed that allows the user to 'Open Appointment'.



By clicking > 'Open appointment' the 'Appointment Details' read only window is displayed.



The Appointment Details pop-up is divided into two sections – Patient Information and Appointment Information.

Patient Information -includes Patient Name (Acct#), DOB, Age, SSN, Email, Phone (H), Phone (W), Phone (M), Phone (O)

Appointment Information –includes Provider, Facility Name, Appointment number, Appointment type, Start and End date, Reason, Length, Status, Copay and Notes

Click the black (**X**) at the top right-hand side of the Appointment Details screen to close it.

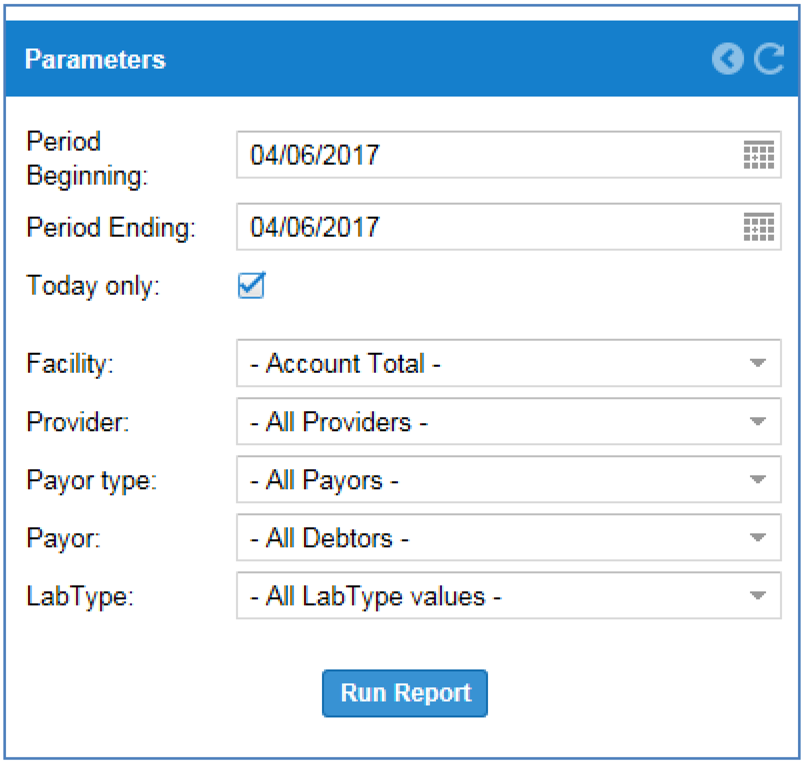
ProviderSuite Report Enhancements

PBI 586: Updated Text Size on Encounter Forms Header Data

On ProviderSuite web app > Reports > Scheduling Reports> Encounter Forms, the font size was increased to make the form easier to read on print preview and after the form is printed.

PBI 948: Updated functionality of "Today only" option on certain reports

Updated functionality of the Today only option on the "Payments by …" and "Claims by DOS …" reports to match how that feature worked in the Billing Manager applet. On ProviderSuite web app > Reports > Billing Report, the Period Ending date normally cannot be set to a date later than yesterday. Users can now select the checkbox 'Today only:' in order to include entries made today. Once checked, the 'Period Beginning:' and 'Period Ending:' fields default to Today for both fields, but users can change those selections to include earlier dates.



Bug 348: Resolved issue where Web App Reports did not work with Chrome or Edge

ProviderSuite web app > Reports > Billing/Scheduling Reports now run in Google Chrome and Microsoft Edge browsers without errors.

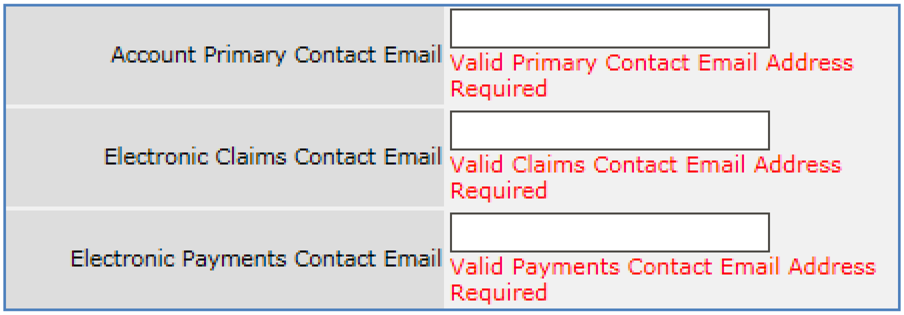
Bug 885: Fixed error when clicking Export twice on Scheduling Reports

The issue where an error message appeared after clicking the Export to Excel button twice on the same report has been resolved.

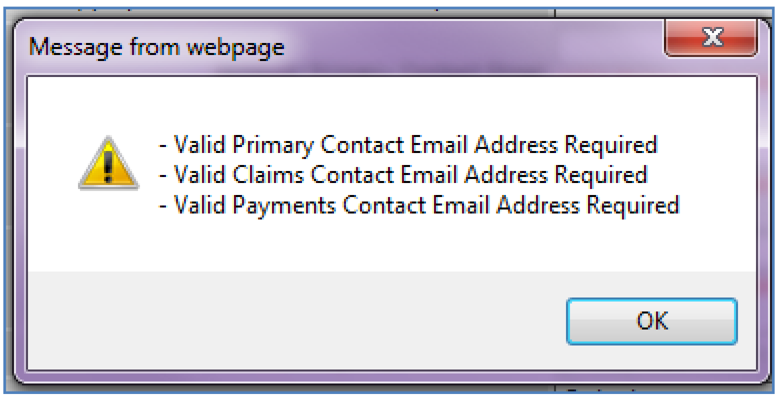
PBI 343: Updated Setup > General to Require Email Contacts

In Setup > General the three contact fields, 'Account Primary Contact Email', 'Electronic Claims Contact Email' and 'Electronic Payments Contact Email', can no longer be left blank.

The user will be notified with a warning message if the field is left blank and the user tabs out of the field.

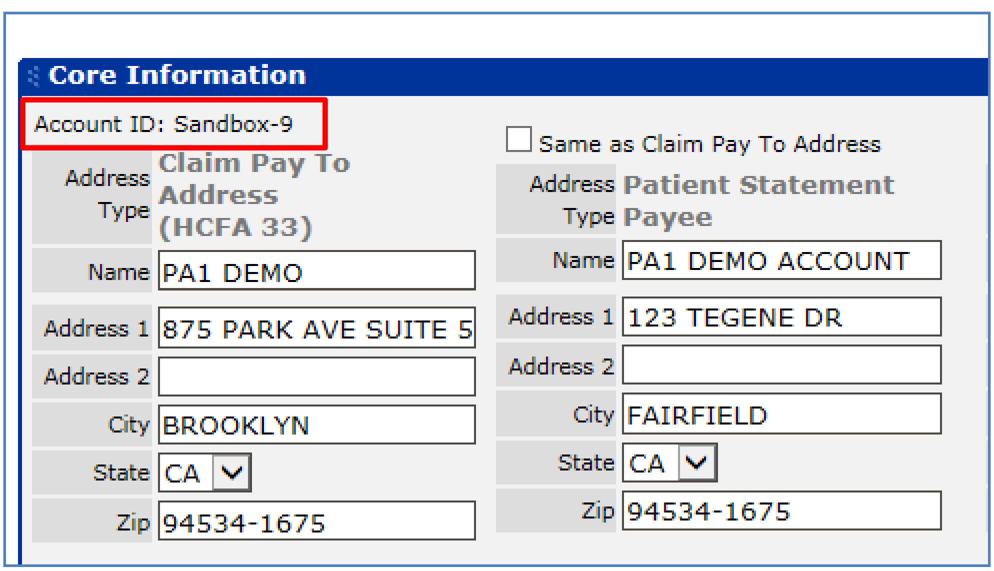


A warning message is also displayed if the user leaves the fields blank and clicks the Update button.



PBI 191: Added Instance Name and Account ID to Setup > General

In the top left side of the Setup> General> Core Information section, the server instance and the unique account identifier are displayed.



A similar update was made in the Account dropdown.