



Enhanced Windows 8 compatibility

Compatibility with the latest Windows version has been improved: various minor UI inconsistencies observed with Internet Explorer 10 are addressed; all features available in Billing, in Client, and on the web site can be used without issues.

ERA auto-posting changes

- Adjustments will now be auto-posted for non-primary (secondary) payers.
- ERA auto-posting process is now enhanced by an additional match-up table allowing fewer unprocessed ERAs caused by unrecognized payer IDs.
- ERAs with payments belonging to several practices will not be processed automatically.

Additional ERA markup

ERAs that may require additional attention will now be noted in the ERA Lookup table:

- Reprocessing attempts counter is now available for every ERA. ERAs that failed to be reprocessed will be noted with red text:

ERA Lookup

This practice has remittance advices requiring followup. Please run the following views for details:
Unprocessed ERAs

User for Payments:

All batches posted from ERAs will be assigned to this user.

Lookup

☒ Unprocessed ERAs
☐ Posted, Pending Review
☐ Find ERA by check or claim number
☐ Find ERA by date range

<input type="checkbox"/>	Payor Name	Check #	Date Uploaded	Date Received	Accounting Date	# of claims	\$ Payment	User	Batch	Reprocessing attempts
<input type="checkbox"/>	ANHEUSER-BUSCH COM...	6646205385	07/06/2007			1	150	Lanxon, Deb	0	1
<input type="checkbox"/>	COVENTRY HC	3958705	07/13/2007			2	140.26	Lanxon, Deb	0	0
<input type="checkbox"/>	CONNECTICUT GENERAL...	235809764	07/13/2007			1	49.54	Lanxon, Deb	0	0
<input type="checkbox"/>	CONNECTICUT GENERAL...	72207192...	07/17/2007			1	0	Lanxon, Deb	0	0
<input checked="" type="checkbox"/>	PGBA, LLC	0012332301	07/23/2007			1	46.23	Lanxon, Deb	0	0

ERAs marked with red color have already been reprocessed before and may require additional attention.



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- ERAs containing payments from several practices will be marked up by red text color and will produce a pop-up note when a mouse cursor is hovered over such ERA:

ERA Lookup

This practice has remittance advices requiring followup. Please run the following views for details:
Unprocessed ERAs

User for Payments:

All batches posted from ERAs will be assigned to this user.

Lookup

☒ Unprocessed ERAs
☐ Posted, Pending Review
☐ Find ERA by check or claim number
☐ Find ERA by date range

<input type="checkbox"/>	Payor Name	Check #	Date Uploaded	Date Received	Accounting Date	# of claims	\$ Payment	User	Batch	F a
<input type="checkbox"/>	NY MEDICARE/GHI	308119136	02/24/2012			6	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICARE/GHI	308139732	02/28/2012			5	0	Payment Poster, ...	0	0
<input type="checkbox"/>	CIGNA	609916536	08/07/2012			1	13.82	Payment Poster, ...	0	0
<input type="checkbox"/>	CIGNA	610246608	08/07/2012			2	272.64	Payment Poster, ...	0	0
<input type="checkbox"/>	CIGNA	86812208...	08/07/2012			1	0	Payment Poster, ...	0	0
<input type="checkbox"/>	CIGNA	86812251...	09/11/2012			1	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICARE/GHI	310217176	03/01/2013			1	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICARE/GHI	310280275	03/13/2013			3	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICARE/GHI	310437534	04/08/2013			6	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICARE/GHI	310470253	04/12/2013			1	0	Payment Poster, ...	0	0
<input type="checkbox"/>	NY MEDICAID	00000003...	04/15/2013			27	864.8	Payment Poster, ...	0	1

This ERA contains remit details for several practices and cannot be processed automatically.

ERAs marked with red color have already been reprocessed before and may require additional attention.

The same changes are applied to the web site:



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Edit	NY MEDICARE/GHI	310133380	02/18/2013			3	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310217176	03/01/2013			1	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310280275	03/13/2013			3	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310393116	03/29/2013			3	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310401365	04/01/2013			1	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310437534	04/08/2013			6	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICARE/GHI	310470253	04/12/2013			1	\$0.00	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	0	Reprocess
Edit	NY MEDICAID	000000037179297	04/15/2013			27	\$864.80	Payment Posted, CRS	Not Posted	ERA Detail	Select Claims	1	

ERAs marked with red color have already been reprocessed

This ERA contains remit details for several practices and cannot be processed automatically.

Payments and ERA data access

Payments, batches and ERAs will now be accessible for the currently selected practice only.

CMS field 9d to report the last used primary insurance

CMS field 9d (Other Ins Plan) now reports the last **primary** insurance to which the claim was billed to, if any.

Ability to move money to unapplied for a patient debtor while posting ERAs

Patient debtor is now available for the **Move Payment to Unapplied** transaction on the **ERA Details** screen to allow processing patient overpayments correctly when posting ERAs.

Ability to add Patient Responsible transactions for ERAs without the need to post the ERA claim manually

Patient Responsible transactions can now be added to any **Posted, Pending Review ERA**.

Posting of **Patient Responsible** transactions is enabled when a cell corresponding to a service line is selected in the **new Pt. Resp. column**.

The **Pt. Resp.** column reflects only transactions **added by users**, it does not include Patient Responsible transactions originally present in the ERA.

Total Pt. Resp. cell, however, calculates patient responsible totals for **combined** ERA Patient Responsible transactions and Patient Responsible transactions added by users.

Patient Responsible transactions are subject to the existing posting rules and will appear in Posted Details, on printouts and in the ERA Details table when an ERA is re-opened.



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Updated on 06/18/2013

General | Posted Details | ERA Details | Patient: -- All patients --

status: posting errors
☐ Show only unposted details
☐ Select all claims for printing

Total Payment Amount: \$49.08 Date Received: 11/29/2012 Accounting Date: / / Deposit Date: / /
Total ERA Amount: \$49.08 Remittance #: 200955639 Check/Ref #: 200955639 Deposit ID:
Total Payment Amount does not match ERA payment amount of \$49.08

☐ Print

DOS From	DOS To	CPT	Remark	Charges	Allowed	Deduct	Coins	Pt. Resp.	Adj Code	Adj Amnt	Payments	Other Pmts	Other Adj	New Bal
09/05/2012	09/05/2012	88305		\$332.00	\$61.35		-\$12.27	-\$10.00	CO 45	-\$270.65	-\$49.08	\$68.08	\$0.00	\$0.00
Total Pt. Resp.			Claim Totals	\$332.00	\$61.35	\$0.00	-\$12.27	-\$10.00		-\$270.65	-\$49.08			

Debtor: 2~ FLORIDA BLUE (53333) JACKSONVILLE, FL 32231-0014 Show All Insurance

Transaction: Patient Responsible NA Amount: -\$10.00 Stmt Msg:
Remarks:
Save Changes 1 / 1 Go

Adjustments: \$0.00 Refunds: \$0.00 Payments: -\$400.08

Click X to close and return to the ERA details when manual posting complete. Manually Posted

DOS From	DOS To	CPT	Remark	Charges	Allowed	Deduct	Coins	Pt. Resp.	Adj Code	Adj Amnt	Payments	Other Pmts	Other Adj	New Bal
10/10/2012	10/10/20...	88305		\$332.00	\$99.53			\$10.00	FI 45	-\$232.47	-\$99.53	\$0.00	\$0.00	\$0.00
Total Pt. Resp.			Claim Totals	\$332.00	\$99.53	\$0.00		\$10.00		-\$232.47	-\$99.53			

Search ERAs by Accounting Date, by Date Received, and by Date Uploaded

New search options are now available on the ERA lookup screen.

The **Find ERAs by date range** option now allows searching by three different types of dates: **Date Uploaded**, **Date Received**, and **Accounting Date**.

The three dates will also be added to the search results table as additional columns.

ERA Lookup

This practice has remittance advices requiring followup. Please run the following views for details:
Unprocessed ERAs

User for Payments:

All batches posted from ERAs will be assigned to this user.

Lookup

☐ Unprocessed ERAs
☐ Posted, Pending Review
☐ Find ERA by check or claim number
☒ Find ERA by date range

☐ Find ERA by Date Uploaded
☐ Find ERA by Date Received
☒ Find ERA by Accounting Date

Date from: Date to:

<input type="checkbox"/>	Payor Name	Check #	Date Uploaded	Date Received	Accounting Date	# of claims	\$ Payment	User	Batch
<input checked="" type="checkbox"/>	VA MEDICARE/TRAILBLA...	302975931	03/11/2009	03/11/2009	03/27/2009	3	0	Not assigned	4292604

Updates to ERA lookup will also be available on the **web site** for the **EDI Payments** page.

Electronic Remittance Advice

This practice has remittance advices requiring followup. Please run the following views for details:
Unprocessed ERAs

User for Payments:

All batches posted from ERAs will be assigned to this user.

ERAs in Date Range 4 record(s) returned

☐ Find ERA by Date Uploaded
☒ Find ERA by Date Uploaded
☐ Find ERA by Date Received
☐ Find ERA by Accounting Date

Date From: Date To: Records/Page:

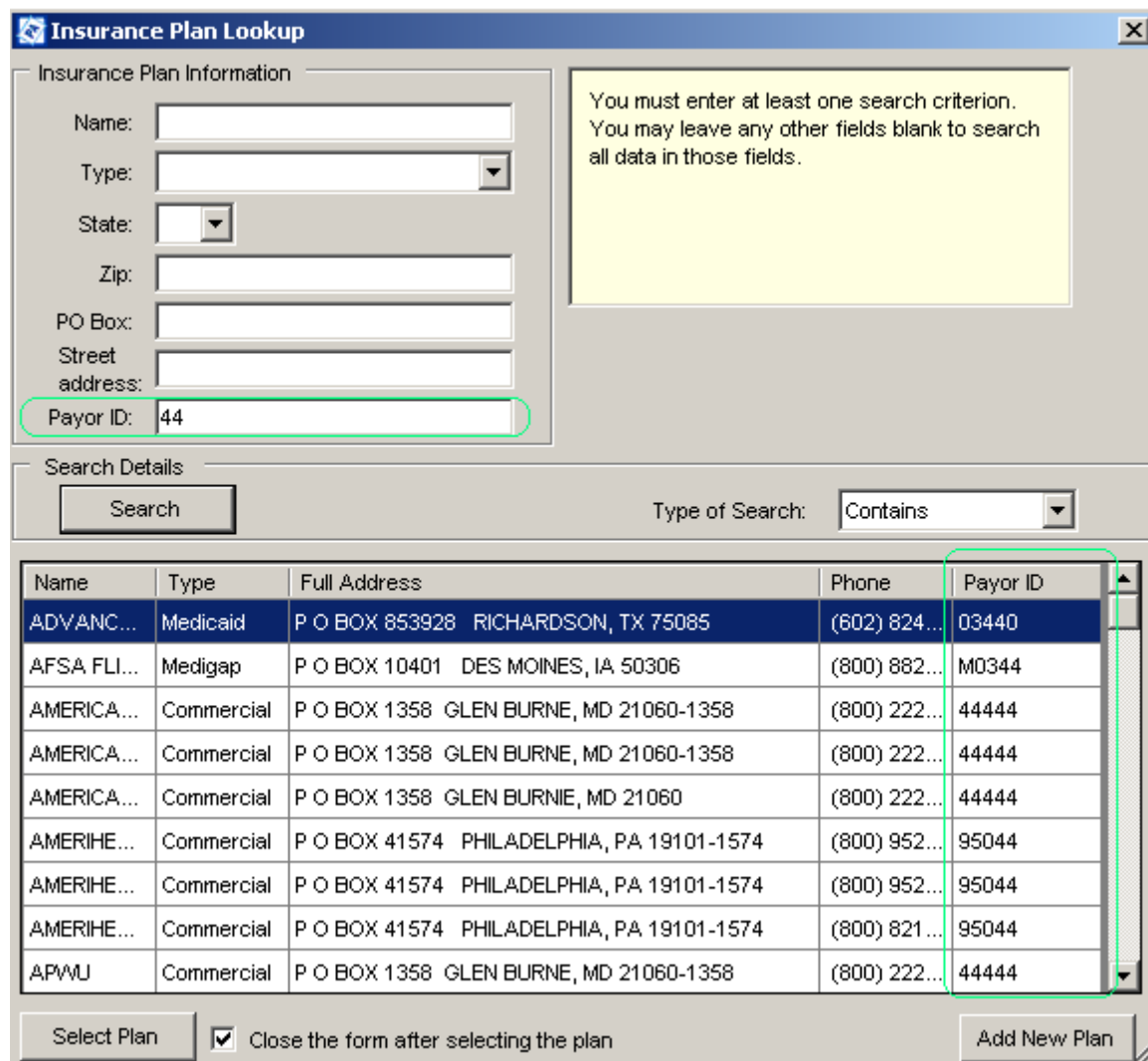
	Payor Name	Check #	Date Uploaded	Date Received	Accounting Date	# of Claims	\$ Payment	User	Batch	ERA Detail	ERA and Claim Detail	Select Claims	Reprocess
	VA MEDICARE/TRAILBLAZERS	884733948	03/26/2009	03/25/2009	04/17/2009	14	\$1,485.54	Paul, Shalini	4363354 (not released)	ERA Detail	ERA and Claim Detail	Select Claims	
Edit	VA MEDICARE/TRAILBLAZERS	303000258	03/27/2009			1	\$0.00	Paul, Shalini	Not Posted	ERA Detail		Select Claims	<input type="button" value="Reprocess"/>
Edit	VA MEDICARE/TRAILBLAZERS	884739463	03/30/2009			14	\$1,013.49	Paul, Shalini	Not Posted	ERA Detail		Select Claims	<input type="button" value="Reprocess"/>
Edit	VA MEDICARE/TRAILBLAZERS	303010930	04/02/2009			1	\$0.00	Paul, Shalini	Not Posted	ERA Detail		Select Claims	<input type="button" value="Reprocess"/>

Search insurance plans by Payer ID

The **Insurance Plan Lookup** window now allows **searching insurance plans by payer ID**.

Payer ID of insurance plans listed in search results will be displayed in an additional **Payor ID** column.

The Payor ID search filter will support both **Contains** and **Equal** search types.



The screenshot shows the 'Insurance Plan Lookup' window. It has a tabbed interface with 'Insurance Plan Information' and 'Search Details' tabs. The 'Insurance Plan Information' tab contains several input fields: Name, Type (dropdown), State (dropdown), Zip, PO Box, Street address, and Payor ID. The 'Payor ID' field is highlighted with a green box and contains the value '44'. To the right of these fields is a yellow message box that reads: 'You must enter at least one search criterion. You may leave any other fields blank to search all data in those fields.' The 'Search Details' tab contains a 'Search' button and a 'Type of Search' dropdown set to 'Contains'. Below the tabs is a table of search results. The table has five columns: Name, Type, Full Address, Phone, and Payor ID. The 'Payor ID' column is highlighted with a green box. The table contains ten rows of data. At the bottom of the window, there is a 'Select Plan' button, a checkbox labeled 'Close the form after selecting the plan' which is checked, and an 'Add New Plan' button.

Name	Type	Full Address	Phone	Payor ID
ADVANC...	Medicaid	P O BOX 853928 RICHARDSON, TX 75085	(602) 824...	03440
AFSA FLI...	Medigap	P O BOX 10401 DES MOINES, IA 50306	(800) 882...	M0344
AMERICA...	Commercial	P O BOX 1358 GLEN BURNE, MD 21060-1358	(800) 222...	44444
AMERICA...	Commercial	P O BOX 1358 GLEN BURNE, MD 21060-1358	(800) 222...	44444
AMERICA...	Commercial	P O BOX 1358 GLEN BURNIE, MD 21060	(800) 222...	44444
AMERIHE...	Commercial	P O BOX 41574 PHILADELPHIA, PA 19101-1574	(800) 952...	95044
AMERIHE...	Commercial	P O BOX 41574 PHILADELPHIA, PA 19101-1574	(800) 952...	95044
AMERIHE...	Commercial	P O BOX 41574 PHILADELPHIA, PA 19101-1574	(800) 821...	95044
APWUJ	Commercial	P O BOX 1358 GLEN BURNE, MD 21060-1358	(800) 222...	44444



Insurance type None is no longer available

The insurance type None is now removed from the list of available insurance types for Insurance Plan Details screen in Billing.

For the existing insurance plans with the None type no changes are made but, the insurances can no longer be re-saved with the type None when edited.

Additional information printed on Patient Demographics

Additional fields are now printed along with the basic information on the **Patient Demographic** printout:

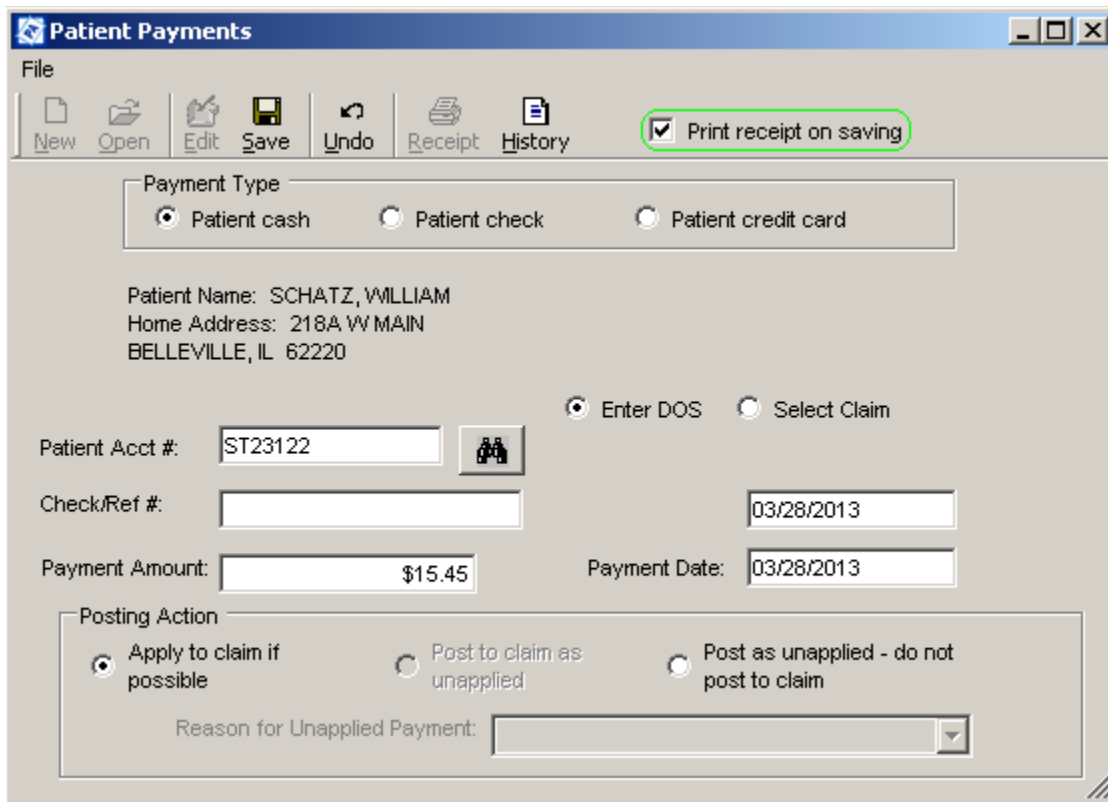
- **Ethnicity**
- **Race**
- **Language**
- **Needs Interpreter**
- **Military Veteran**

Receipt printing changes

Payment receipts can now be printed via the **Print Receipt** option for a patient payment **only** after the payment itself is saved.

A new option is now available for the **Patient Payments** screen and for **Claim - Final** screen: **Print Receipt on Saving**.

When enabled, this option will produce a receipt printing dialog when a payment is saved (**Patient Payments**) or a claim is released (**Claim - Final**) without the need to load the saved payment again. Receipt printing can be cancelled, but the payment will be saved regardless.



The screenshot shows the 'Patient Payments' window with the following details:

- File menu:** New, Open, Edit, Save, Undo, Receipt, History. A checkbox labeled 'Print receipt on saving' is checked and highlighted with a green box.
- Payment Type:** Radio buttons for Patient cash (selected), Patient check, and Patient credit card.
- Patient Information:** Patient Name: SCHATZ, WILLIAM; Home Address: 218A W MAIN, BELLEVILLE, IL 62220.
- Payment Details:** Patient Acct #: ST23122; Check/Ref #: (empty); Payment Amount: \$15.45; Payment Date: 03/28/2013.
- Posting Action:** Radio buttons for Apply to claim if possible (selected), Post to claim as unapplied, and Post as unapplied - do not post to claim.
- Reason for Unapplied Payment:** A dropdown menu.



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Patient Payment

Payment Type
☐ None ☒ Patient cash ☐ Patient check ☐ Patient credit card

Check/Ref #: 334562312 Payment Date: 01/01/2013

Payment Amount: \$5.00

☐ Print receipt on saving:

Other

Prior Authorization #: show last

Referral #: show last

Medicaid Resubmission Code:

Original Reference #:

Lab Work: ☐

Lab Charge:

Patient Is Pregnant: ☐

Patient Weight (grams):

Save Claim

Print

The **Print Receipt** button will still be available for previously saved patient payments.

Patient payments associated with a claim on the **Claim - Final** screen will no longer be available for editing.

The name of the user who had printed the payment receipt will now be available on the receipt printout.



PATIENT RECEIPT and INVOICE

PA DEMO ACCOUNT
3512 HARRIS AVE
ST LOUIS, MO 63116
Phone: (245) 624-6246 x5246
Tax ID:

Guarantor:

JENNIFER SCHELLINGBURGER
123 ANYWHERE DR.
WAIKIKI, HI 12345

Patient: JENNIFER SCHELLINGBURGER
Account Number: ST23096
Date Printed: 04/01/2013
Printed By: Doe, John

For billing questions, call (245) 624-6246 x5246.
Patient Balance: -\$10.00
Payment Received: \$10.00
Payment Date: 4/1/2013
Payment Type: cash
Payment Check/Ref#:
Date of Service: 04/01/2013

Patient Transaction History available from the Patient Payments screen

A new **History** button will be available on the **Patient Payments** screen to provide access to patient's transaction history. The **Patient Transaction History** screen opened from the Patient Payments window will allow switching between the Patient Payments and Patient Transaction History screens.

The modified Patient Transaction History screen will retain much of the original functionality, except for the following:

- The modified **Patient Transaction History** window will display transactions **only** for the patient currently loaded on the Patient Payments screen.
- The **Go to Claim, Go to Patient, Go to Payment, patient selection controls** and the **ability to open the Claim Transaction Details screen** by double-clicking on a claim in the main Transaction History table will not be available.



Patient and claim **notes**, **HCFA view** of the selected claim, **statements** view, transaction history report printing, and the **Force Next Statement** option will be available along with all filtering options not related to switching the current patient.

The modified Patient Transaction History will rely on the Patient Payments screen to define a patient whose transaction history should be displayed.

Transaction history tables will be empty if the Patient Transaction History screen is opened with **no patient selected** on the Patient Payments form; transaction history tables will be filled automatically after a patient is loaded on the Patient Payments screen.

The modified Patient Transaction History will be automatically closed when the Patient Payments screen is closed.

The Transaction History window will always be displayed with the **Details** option enabled by default when accessed from the Patient Payments screen.

Payments posted while the Transaction History window is opened **will not** appear in the history tables **automatically**, a manual refresh will be required to see changes.

All changes are only applied to the Transaction History window available from the Patient Payments screen; the original Patient Transaction History available from other screens will remain the same.

Patient Payments

File New Open Edit Save Undo Receipt History Print receipt on saving

Payment Type:
☐ Patient cash
☐ Patient check
☐ Patient credit card

Patient Name: AUSTIN, STEPHEN
 Home Address: 1910 ROCKY MILL LANE
 TUCKER, GA 30084

Patient Acct #: ST324 Enter DOS: Select Claim

Check/Ref #: 03/28/2008

Payment Amount: \$50.00 Payment Date: 03/28/2008

Posting Action:
☐ Apply to claim if possible
☐ Post to claim as unapplied
☐ Post as unapplied - do not post to claim

Reason for Unapplied Payment:

Version: 6.1.92.16941

Practice Admin Claims Management

From: Tue, 04/02/2013 To: Tue, 04/02/2013

Days from: Earliest Submit Date

Type: - All -

Type: - All Insurance Types -

Type: - All Plans -

Type: - All Patients -

Type: - All Facilities -

Type: - All Providers -

Bucket: For Follow-up

Status: Statements not going

Apply Filters Refresh List

NAME

Click 'Refresh List' or 'Apply Filters'

Patient Transaction History

Patient Info

A/C # ST324

Patient Name (A/C#): AUSTIN, STEPHEN (ST324)
 DOB: 2/3/1942 Age: 71 years
 Primary: MEDICARE GA B45464654B
 Secondary: FLORIDA BLUE 1255615651

Total OS Bal: \$127.94
 Patient: \$0.00 Ins: \$127.94 Ind A/C: \$0.00
 Collections OS: \$0.00 Collections W/O: \$0.00
 UA Ins pmts: -\$50.00 UA Pat pmts: -\$25.00

Earliest History Date: 02/21/2008

☒ Show Details Show Date From 03/28/2008 To 04/02/2013 Refresh Data

Payor Type: - All - Payment Type: - All -

Check/Ref#: Payment Amount: Clear Deselect

Total Charges: \$298.00 Total Ins Payments: \$50.00
 Total Pat Payments: -\$150.00 Total Adjustments: -\$70.06

Go to Notes Go to HCFA view Print Itemized statement View Statement

DOS	Claim ID	Posting Date	Charged	Ins Paid	Pt Paid	Adjusted	Balance	Description	Debtor	Provider
03/28/2008	1589937	03/28/2008	\$116.00	\$50.00	-\$150.00		\$16.00	Claim - Submitted by Mail	MEDICARE GA	DUCK, DONALD
03/28/2008	1589937	03/28/2008		\$50.00				Unapplied Move Payment to Unapplied	MEDICARE GA	
08/28/2008	1859346	09/02/2008	\$50.00				\$50.00	Claim - Submitted by Mail	MEDICARE GA	JONES, ALONZO
09/04/2008		09/04/2008			-\$25.00			Unapplied Payment 5 - Patient Ca...	AUSTIN, STEPHEN	
03/24/2009	2249375	03/24/2009	\$50.00			-\$25.09	\$24.91	Claim - Submitted by Mail	MEDICARE GA	DUCK, DONALD
08/06/2009	2552354	08/20/2009	\$82.00			-\$44.97	\$37.03	Claim - Submitted by Mail	MEDICARE GA	DUCK, DONALD
		06/19/2008					\$0.00	Insurance Statement	AUSTIN, STEPHEN	

DOS	Claim ID	CPT	Posting Date	DR	CR	Balance	Description	Debtor	Batch	Reference
03/28/2008	1589937	99212	03/28/2008	\$116.00		\$16.00	OFFICE OUTPATIENT VISIT 10 MINUTES ...	MEDICARE GA		
	1589937	99212	03/28/2008		-\$25.00		Payment 5 - Patient Cash (from unapplied)	AUSTIN, STEPHEN	2858962	101100
	1589937	99212	03/28/2008		-\$100.00		Payment 3 - Patient Check	AUSTIN, STEPHEN	2858962	
	1589937	99212	03/28/2008	\$100.00			Move Payment to Unapplied	MEDICARE GA	2858962	
	1589937	99212	03/28/2008		-\$50.00		Payment from Unapplied	MEDICARE GA	2858962	
	1589937	99212	04/23/2008		-\$25.00		Payment 5 - Patient Cash (from unapplied)	AUSTIN, STEPHEN	3177213	101100
08/28/2008	1859346	99601	09/02/2008	\$50.00		\$50.00	HOME NFS/SPECTY DRUG ADMIN PR VS...	MEDICARE GA		
	1859346	99601	04/21/2010				Bulk Rebill	MEDICARE GA	6385581	
	1859346	99601	08/31/2010				Bulk Rebill	MEDICARE GA	7776854	
	1859346	99601	08/31/2010				Add'l Info Needed	MEDICARE GA	7776854	
03/24/2009	2249375	99201 (SG)	03/24/2009	\$50.00		\$24.91	OFFICE OUTPATIENT NEW 10 MINUTES ...	MEDICARE GA		



Fixed issues

1. An issue when a random insurance plan belonging to a patient may be reported in **CMS field 9d (Other Ins Plan)** for non-primary claims is now addressed.
2. An issue when the users were unable to uncheck the **Send Pre-Collection Letters** option if the **Switch Past Due accounts to Pre-Collection letters automatically** option was enabled is now addressed.
3. An issue when claims saved with insurance payers with type **None** produced an error when processing is now addressed.
4. An issue when scheduling-only providers were included in the referring Providers list on the Claim-General screen is now addressed.
5. An issue when the patient's date of birth may be shifted one day back when performing patient search is now addressed.
6. An issue when an incorrect icon was displayed for Billing application in Windows taskbar is now addressed.
7. An issue when tabulation order may be incorrect on the **Workers Compensation** tab of the **Patient** screen is now addressed.
8. An issue when a state ZIP code could be printed incorrectly on an UB-04 form is now addressed.
9. An issue when an incorrect provider could be picked for a batch eligibility request is now addressed.
10. An issue when a payment could be 'lost' after combining batches is now addressed.
11. An issue when an incorrect Date Received could be assigned to a payment for practices using the last day of the current month as a cut-off date is now addressed.
12. An issue when an incorrect data could be displayed in the Last Diagnoses list for patients with unprocessed claims is now addressed.
13. An issue when the Location value could be displayed incorrectly for claims with multiple service lines on the Claim - Details screen is now addressed.



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- 14. An issue when incorrectly formatted POS (place of service) codes could cause EDI rejections is now addressed.
- 15. An issue when an incorrect user could be assigned to an ERA after reprocessing is now addressed.
- 16. An issue when an incorrect user could be assigned for payment details processed after saving a Posted, Pending Review ERA is now addressed.
- 17. An issue when Patient Search was limited to patients belonging to the current practice only is now addressed.



New Patient Statements report

A new **Patient Statements** report is available in *Billing*. The report presents a total number of statements sent for each patient along with details on every created statement and the patient's balance.

The report can be run for Practice Total, for each facility, and for individual facilities for a set date range.

Each report row represents patient's balance sent in a statement taking into account the facility filter - only balances for the selected facility will appear in the results if the report is run for an individual facility.

Statements on demand are not included in the statement count, but will still appear in the results. Information about the patients' next statements will also be reported, if available.

New Active Insurances report

A new report is available in Billing: **Active Insurances**. The report provides the list of all insurances currently active for the practice along with basic information on the listed insurances.

Insurance balance in the Pre-Collections Completed report

Insurance balances transferred to collections are now reported in the Pre-Collections Completed report in the corresponding column (Insurance Balance), separately from the patient balance.

Totals are available for both Insurance Balance and Patient Balance columns.

Combined Report v.4 update

Each report section will now begin on a separate page when printing via the **Print** button.

Open in Excel feature is not affected.

Fixed issues

1. An issue with the Claims by DOS/Accounting Date with CPT Detail report not allowing wildcards for CPTs longer than 4 symbols is now addressed.
2. An issue when the **Charge Masters** report could provide incorrect override values due to rounding is now addressed.

Extended information on Patient balance in Appointment Details

The right part of the patient details area is now rearranged to include the patient part of the outstanding balance information.

Copay details split by insurance rank can now be reviewed by moving the mouse cursor over the exclamation mark in the Copay cell.

Insurance:

Copay: Unapplied: \$0.00

Balance: \$0.00 Pt. Balance: \$0.00

Phone (H): (615) 740-1483 Phone (M):

Phone (W): Phone (O):

Email:

Active Pre-Authorizations: 0

Insurance:

Copay: Unapplied: \$0.00

Primary: \$0.00 Pt. Balance: \$0.00

Secondary: \$0.00 Phone (M):

Tertiary: \$0.00 Phone (O):

Liability: \$0.00

Email:

Active Pre-Authorizations: 0

Patient part of the total outstanding balance is now reported separately on the **Schedule** printout.

Schedule for Wednesday, 03 April 2013						
Time	Patient	Appt Type	Patient Phone	Copay	Pt. Bal	Total Bal
6:15 PM - 6:25 PM	SALEWSKY, TAMMY DOB: 8/13/1968 Acct #: ST582	1 Week f/u	H: (615) 740-1483		\$0.00	\$0.00

New column available in the Appointment List by Patient report

The **Mobile Phone** column is now present in the list of available additional columns for the **Appointment List by Patient** report. The column will not be displayed in the report by default; it will be present in the list of available columns available via the **Change Columns** button.

Editing appointment notes via the Appointment List by Patient report

Appointment notes can now be edited directly from the Reports screen without the need to open individual appointments in Scheduling. This ability is also available on the web site.

The existing Appointment Notes window available via the **Appointment List by Patient, Unbilled Appointments** and the **Patient Registration form** reports now allows editing and saving appointment notes.

On the web site, an additional column with editing links is now available for editing appointment notes for the same set of reports. (**Appointment List by Patient, Unbilled Appointments** and the **Patient Registration form**)

[Print](#)

Appointment List for all providers, at all facilities for all appt types for all statuses from 4/1/2013 to 4/30/2013

	Patient Name	Acct Number	Date/Time	Provider	Facility	Appt Type	Appt Notes	Status
Edit	BUCCI, ROBERT M	AN1211	4/5/2013 11:30 AM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 months.	Pending
Edit	TALLEY, MADISON M	AN2388	4/12/2013 2:00 PM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 months	Pending
Edit	BOLEY HANLON, LESLIE	AN15	4/15/2013 2:00 PM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 months Pt getting married.	Pending
Update Cancel	SACCAVINO, LAUREN	AN1110	4/17/2013 7:00 AM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90804 (30 Min)	Another appointment note.	Pending
Edit	BUYERS, DAVID	AN1434	4/24/2013 2:00 PM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 months	Pending
Edit	PINDER, THERESA	AN2203	4/26/2013 9:00 AM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 month	Pending
Edit	MULLANEY, RENATE	AN740	4/29/2013 11:30 AM	NELSON, A SUSAN	A SUSAN NELSON ARNP, INC (689)	90805 (30 Min & Med Mgmt)	6 months	Pending

Option to print physical practice address on the patient registration form

An option to print either practice's **physical address** or the **Claim Pay To** address is now available in the **Patient Registration Form** report in Client and on the web site.

PracticeAdmin Client

Reports

Export Print Print Preview Reports

Scheduling <<

View Schedule

Facility Templates

Provider Templates

Reports

Setup Facilities

Setup Providers

Report: Patient Registration Form

Patient: - All Patients -

Provider: - All Providers -

From Date: 4/1/2013

To Date: 4/30/2013

Sort Order: Alphabetical

Practice Address to Print: Claim Pay To Address

Claim Pay To Address

Physical Address

Cancelled Appts: ☐ Change Columns Reset Columns

Reset Filter Run Report

Scheduling Reports

Report: Pt Registration Form

Patient: --Select All--

Provider: --Select All--

Date From: 4/1/2013

Date To: 4/30/2013

Sort order: Alphabetical

Practice Address to Print: Claim Pay To Address

Claim Pay To Address

Physical Address

Run Report

New column in the Eligibility Results report: Eligibility type

A new column has been added to the Eligibility results report in Client: Eligibility Type. The column reflects the type of a request:

- **Batch** corresponds to a scheduled batch eligibility request
- **Real-Time** corresponds to an eligibility request made on-demand

Fixed Issues

1. An issue when appointments were not displayed on the View Schedule screen is certain cases is now addressed.

2. An issue when the eligibility service always returned Processing Error if the Client's time was different from the server's time is now addressed.
3. An issue when appointment statuses would not be updated for the remaining occurrences of a recurring appointment when changing its status to Cancelled is now addressed.
4. An issue when encounter forms could be printed without images when using the Print All Forms option is now addressed.
5. Client's desktop icons are now displayed correctly when using any standard desktop icon size.
6. An issue when the Eligibility Result icon was not updated after the eligibility result is received is now addressed.
7. An issue when Referral Source could be printed partially when printing encounter forms is now addressed.

Option to allow Pre-Released claims data in the Show Last selection

A new option is available on the **Setup - General** page on the web site: **Allow Pre-released claims for Show Last buttons.**

The option provides control over data which can be used for the **Show Last** buttons in Billing.

If the option is enabled, claims saved to any of the **pre-released** statuses will be accounted when the **Show Last** button is pressed, otherwise only fully released claims will be taken into account.

The following **Show Last** buttons are affected:

- The **Show Last** button for the last used **referring provider**, Claim - General screen
- The **Show Last** button for the last used **relevant dates, Current:** date, Claim - General screen
- The **Show Last** button for the last used **hospitalization dates**, Claim - Details screen

CC E-mails to Manager	CC Manager
Practice Manager E-mail	asnphd@bellsouth.net
EDI Claims E-mail	asnphd@bellsouth.net
EDI Payments E-mail	asnphd@bellsouth.net
Billing Inquiries Phone #	(772) 692-3140
Prompt when pmt posting for low pay reason?	Do not calculate allowed amounts
Do Not Calculate Charges	<input type="checkbox"/>
Set new claims to hold	<input type="checkbox"/>
Allow submission of \$0 balance claims	<input checked="" type="checkbox"/>
Show Ref Prov and PCP on pt form	<input checked="" type="checkbox"/>
Include flag for emergency services	<input type="checkbox"/>
Default Number of Diagnoses to Show	4
Allow Employment-Related Claims for Primary Insurance	<input type="checkbox"/>
Allow Sending Claims to EDI as Voided	<input checked="" type="checkbox"/>
Local Coverage Determinations	Do not check
Allow Printing Additional Diagnosis Codes on CMS-1500	<input type="checkbox"/>
Allow pre-released claims for Show Last buttons	<input type="checkbox"/>



XLS format for Fee Schedule import and export

Overrides for allowable schedules and charge masters can now be imported as an Excel table (XLS) without the need to save it to CSV. The XLS support effectively eliminates import errors related to special symbols (for example, delimiters like commas, dots, or semicolons)

Import of CSV files is still possible.

Exported values are now saved in XLS format.

Also, format of the import template is now unified with the format of the exported values; both contain the same set of columns and both are ready for import once filled with a set of values to import or edited; no additional formatting is required.

Please note that XLSX files are not supported.

Fixed issues

1. An issue when previously generated collections files were unavailable for download is now addressed.
2. An issue when the Login Help page was not displayed when the Login Help link is clicked on the Login screen is now addressed.
3. An issue experienced when using Internet Explorer 10 with column width on the Scheduling tab on the web site is now addressed.
4. An issue when certain content links on the web site were pointing to content on an incorrect server is now addressed.
5. An issue when an error could be observed when reviewing claims on the Review Claims tab on the web site is now addressed.