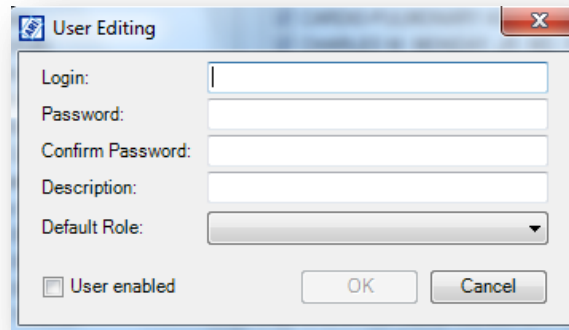


Release Notes for ARI 4.2

New Features

Specific user rights per practice

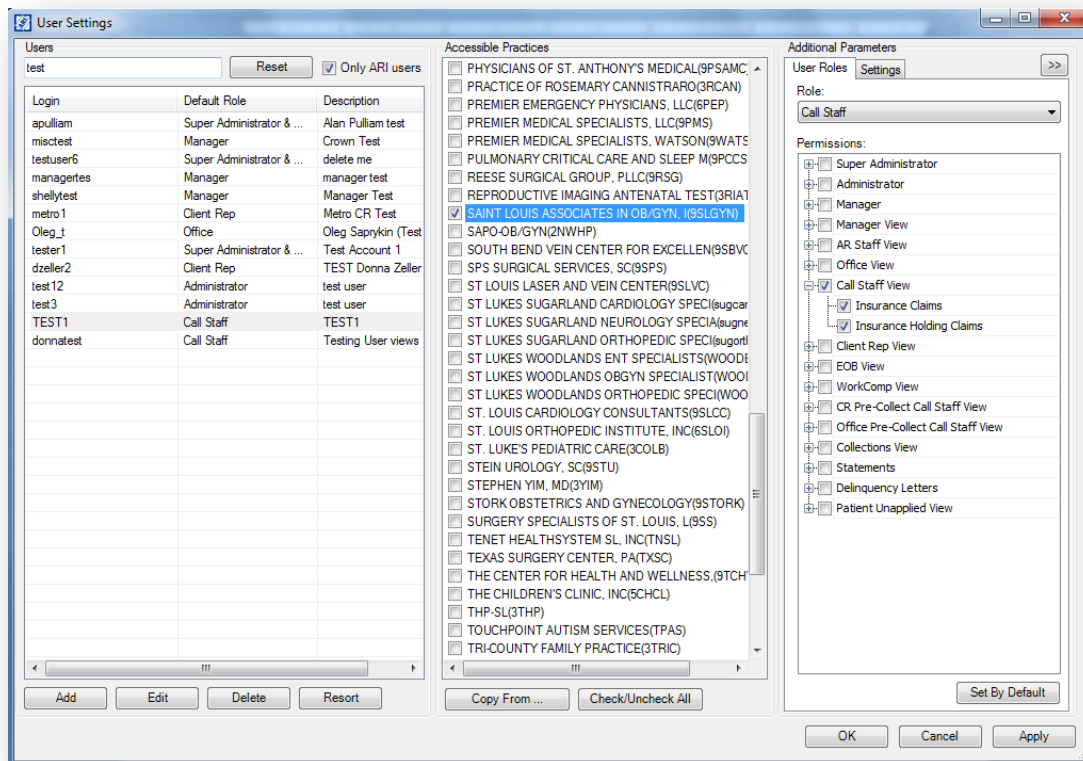
The **User Roles** area is no longer available on the **User Editing** form. The **Default Role** dropdown is added instead.



The **User Editing** dialog box contains the following fields and controls:

- Login:** Text input field
- Password:** Password input field
- Confirm Password:** Password input field
- Description:** Text input field
- Default Role:** Dropdown menu
- ☐ **User enabled**
- OK** button
- Cancel** button

The **Additional Parameters** section on the **User Settings** form is now split into two tabs: **User Roles** and **Advanced Settings**. The former functionality of the **Additional Parameters** section is now available on the **Advanced Settings** tab.



The **User Settings** form is divided into three main sections:

- Users:** A table listing users with columns for Login, Default Role, and Description. It includes a **Reset** button and a ☒ **Only ARI users** checkbox.
- Accessible Practices:** A list of medical practices with checkboxes for selection. The selected practice is **SAINT LOUIS ASSOCIATES IN OB/GYN, I(SLGYN)**.
- Additional Parameters:** A section with two tabs: **User Roles** and **Settings**. The **User Roles** tab shows a **Role:** dropdown set to **Call Staff** and a list of permissions with checkboxes, including **Call Staff View**, **Insurance Claims**, and **Insurance Holding Claims**.

Buttons at the bottom include **Add**, **Edit**, **Delete**, **Resort**, **Copy From ...**, **Check/Uncheck All**, **Set By Default**, **OK**, **Cancel**, and **Apply**.

The new **User Roles** tab contains the **Role** combobox with assigned user role for the selected practice, and the **Permissions** tree for more detailed access settings.

Additional Parameters

User Roles Settings >>

Role:
EOB

Permissions:

- ☐ Super Administrator
- ☐ Administrator
- ☐ Manager
- ☐ Manager View
- ☐ AR Staff View
- ☐ Office View
- ☐ Call Staff View
- ☐ Client Rep View
- ☒ EOB View
 - ☒ Insurance Claims
 - ☒ Insurance Holding Claims
- ☐ WorkComp View
- ☐ CR Pre-Collect Call Staff View
- ☐ Office Pre-Collect Call Staff View
- ☐ Collections View
- ☒ Statements
 - ☒ Holding for Next Patient Statement
 - ☒ Patient Statement Review
 - ☒ Queued for Patient Statement
- ☐ Delinquency Letters
- ☐ Patient Unapplied View

Set By Default

If a state of a checkbox in the **Permissions** tree does not correspond to the predefined set of permissions for the selected user role in the **Role** dropdown, the checkbox is marked with blue to draw user's attention.

For example, if EOB is selected in the **Role** dropdown and the user checks the **Statement** checkbox, it will be marked with blue, as far as EOB users typically have no access to the Statements.

The **Set By Default** button resets the checkboxes to the predefined set of permissions for the selected user role.

The **Accessible Practices** list supports multiselect now. If several practices are selected, only common permissions for all of the selected practices are checked.

If the user being edited has different roles in the selected practices, the **Role** combobox is empty. If permissions are changed while several practices are selected, the changes are applied to all the selected practices.

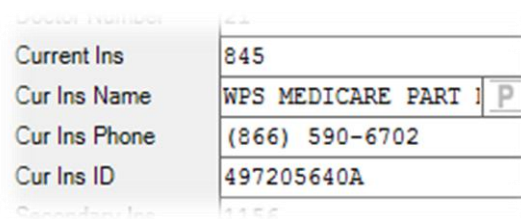
If the role is changed in the **Role** dropdown while several practices selected, the new role will be assigned to the user for all the selected practices.

When the users log in **ARI Client** or **ARI Admin**, only those settings and features will be enabled that are permitted to the user for the certain practice.

New name for primary insurance on the Claim-Detail tab

The names of the fields on the **Claim Details** tab which correspond to primary insurance are now renamed so as not to confuse the users when primary insurance becomes secondary and vice versa.

Old Field Name	New Field Name
Primary Ins	Current Ins
Pri Ins Name	Cur Ins Name
Pri Ins Phone	Cur Ins Phone
Pri Ins ID	Cur Ins ID



A screenshot of a software interface showing a form with the following fields and values:

Current Ins	845
Cur Ins Name	WPS MEDICARE PART 1 P
Cur Ins Phone	(866) 590-6702
Cur Ins ID	497205640A

Automatic access to new practices

A new script is developed that will be used when adding a practice from PA to ARI. The script adds access to the practice for the users with `master_users.Default_Security_Level_ID =10` (PA Database).

Fix plugin for DM1 files format

In order to mitigate adding new billing suites to ARI, administrators are now able to request a plugin that could be quickly developed and plugged to DM1 Import so as to handle DM1 source files which do not agree with the currently supported CSV format.

The plugin will provide the ability to fix unnecessary characters in the source DM1 file (quotes, line brakes, etc). The plugin will be specified in the XML file that defines the DM1 schema:

```
<DM1FixPlugin>FileName.dll</DM1FixPlugin>
```

Behavior changes for the Show only ARI users checkbox

If the **Show only ARI users** checkbox is checked, only those users will be displayed which have the rights to at least one ARI user class. The users with no rights to any ARI user class will be hidden.

Search capability for users in ARI Admin

Administrators are now able to quickly find a user on the **User Settings** form.

When the user is typing a text in the **Search** field the list of the users is filtered dynamically. Only those users are displayed which contain the entered in the **Search** field string either in the **Login** or in the **Description** fields (or both).

The **Show Only ARI users** checkbox is now renamed to **Only ARI users** and moved to the top of the **Users** section.

[illegible]

Excluding claims in Hold statuses and claims with transactions on hold from DM2 export

The DM1 file format is now changed as follows:

- The **ClaimStatus** column is renamed to **ClaimCopyStatus**. The column reflects the `claim_final.status` field for the claim.
- Two new columns are added: **OnHold** (reflects `claims.hold` field) and **TransactionsOnHold** (contains 1 if the claim has transactions on hold, 0 otherwise).

New controls are now available on the **Practice Settings** screen of **ARI Admin** for each practice.

Practice settings	
Turn Off AR user	False
Turn Off Office user	False
Turn Off Call Staff user	False
Exclude Bill Types List	10; 15;
Exclude Practice from Call Staff Export file	False
Claim Copy Statuses Excluded from Call Staff Export File	
Exclude Claims on Hold	False
Exclude Claims with Transactions on Hold from Call Staff Export File	False
Exclude Practice from AR Staff Export file	False
Exclude Practice from Pre-Collect Call List Export file	True
Number of days for Date of Last Pay	60
Doc Exclude Numbers (From Call Staff)	
Enable STA/DL Printing	True
Call Staff Activation Delay	30
02. Reports	
Email List	
Send single-practice reports	False
03. FTP Settings	

- The **Exclude Claims with Transactions on Hold from Call Staff Export File** dropdown.
If this setting is set to True, claims of this practice which have **TransactionsOnHold =1** in DM1 file will not be included in DM2 export.
- The **Claim Copy Statuses Excluded from Call Staff Export File** field.
Claims of this practice which have **ClaimCopyStatus** (in DM1 file) that is listed in this setting will not be included in DM2 export.
- **Exclude Claims on Hold** dropdown.
If this setting is set to True, claims of this practice with **OnHold=1** in DM1 file will not be included in DM2 export.

The **Claim Statuses Excluded From Call Staff Export File** setting is now eliminated.