# EHR System Updates Production Release December 2022 Table of Contents

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# **Patient Responsibility Estimator**

This new feature allows the practice to view estimated patient responsibility from the scheduler.

To view the Estimated Patient Responsibility window:

- 1. Click the More button
- 2. Then click Patient Responsibility



A pop-up will appear that shows the estimated responsibility of the patient.

Welcome, Dr. DEV	PHYSICIAN 1 - Smith Fri 12	/09/22 11:45 AM EST (Lo	ogout)						Sə 🔊 X	285 💶 🕘 ?			
Schedule Document and Bill	E Patient Responsibility for	r Calico Cat							×	Tabs 🗸 🕺 💡			
Home Schedule 🗷													
VRC3586885 Pa	Estimate	d Patient	Respons	sibility									
Cat AL	EStimate	a r atient	Respons	Sibility					EV PHYS (DP)				
Calico (Kitty)									8:00a				
07/09/1982									8:15a				
- Phone 1 -	Collect this	s amount tod	ay: \$259.1	2					8:30a				
- Phone 2 -									8:45a				
JMUTALE@ESPOC.COM	Estimated pati	ient responsibility	x: \$0.00						9:00a				
PHIL THEREN	Eounated par												
Clear Create More	Today's Patient Re	esponsibility (Estimat	00 02 (be		Cash cha	arges: \$0.00			9:30a				
Day Conflicts	Today 5 Fallent Re	esponsibility (Estimate	eu). \$0.00		Casil cha	arges. \$0.00			9:45a				
10:00 a N Burcham													
	Patient balance	e from past visit	s: \$259.12						10:30a				
									10:45a				
Alasta									11:00a				
* 0 or fewer fut appt	Click here for de	etails						^	11:15a				
* Patient has a large outstanding balance. Talk									11:30a				
to patient about	CPT	NAME	SVC DT	CASH PROC?	UNITS	CHARGE	BAL		11:45a				
* Needs appt									12:00p				
* Please set up payment	72100	X-Ray L-S	09/01/16	0	1	\$54.00	\$15.00		12:15p				
🐺 Popup On									12:30p				
Date 🔻 Patient	97112	Neuromus	09/01/16	0	1	\$37.00	\$10.00		12:45p				
Fri Dec 09 N.Burchan 🔺									1:00p				
Fri Dec 09 N.Burchan	98941	Chiropracti	09/01/16	0	1	\$45.00	\$10.00		1:30p				
Fri Dec 09 N.Burchan									1:45p				
Fri Dec 09 N.Burchan	98940	Chiropracti	02/06/17	1	1	\$35.00	\$10.00		2:00p				
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Fri Dec 09 N.Burchan	L	1							3:00p				
<										•			

The window displays the amount of money that needs to be collected from the patient, the estimated patient responsibility, estimated patient responsibility for that day, patient balance from past visits, and the detailed information of all the transactions with that patient.

This can be used by the practice to view, in advance, the estimated balance and responsibility of the patient so that they will be ready to charge or inform the patient.

# **Billing Widget Update**

#### Modifiers can now be set as favorite

This update allows clinicians to set Favorites for their ICD/CPT modifiers to allow easy documentation of the most common encounters for the practice.

When clinicians need to add modifiers to their CPT codes, they can choose the appropriate modifier from a set of favorites.

To add a modifier not currently in the list of favorites:

ALL'	Welcome, Dr. DEV F	PHYSICIAN 1 - Smi	ith Mon 12/19/22 12:24 PM E	EST (Logout)				
Schedule	Document and Bill E	Billing - Workben	ch	Config - Files -	Versions - Apps	Help - What's	New?	Tabs 🗸 🕺 🥐
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$\rightarrow$								
	CPT S					Q	Search Matches	1
	CMT		) I I I				Please enter query to search	
	СМП	99211			( <b>*</b> )			×
	9894	Office or othe	er outpatient visit for the	evaluation and n	nanagement of			Θ
		an establishe	ed patient that may not re	equire the preser	nce of a	_ ^ _		
	*	Units	25	59	96			
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		Modifiers	GP	бт	GY			E E
		#1	06	тн2		pse		
		F-A-K-I	40			^		
	Favo	Note	Set Favorites	Clear	X Close			
	Anesthesia f	Patient Auth	orization N	IDC	~			
	till	- Empty -		aug				
	Shaving of e lesion, single	pidermal or de e lesion, scalp,	Shaving of epidermal or lesion, single lesion, sca	de Radiologic p, single view	examination, s , specify level			
	*8	72040	*11 72	.050 ★ 🛍	72052			
	Radiologic e cervical; 2 or	xamination, s r 3 views	Radiologic examination, cervical; 4 or 5 views	s Radiologic cervical; 6	examination, s or more views			

1. Click on the **Set Favorites** button.

BEIN	Welcome, Dr. DEV P	HYSICIAN 1 - Smith Mor	n 12/19/22 12:27 PM EST	(Logout)	So X29 🖬	82
Schedule	Document and Bill B	illing - Workbench - S	Search - Reports - C	onfig + Files + Versions + Apps Help + What's New?	Tabs + 🗙	2
Home	Document and Bill					
$\rightarrow$					×	$\boldsymbol{\heartsuit}$
	CPT Se	earch query	Person Mod	lifier Config 😧 🛛 🚺 🕇 🖉	Add X Delete	
	9894	99211	Modifier	Description		X
		Office or other ou an established pa	AT	Acute treatment.		
	*	Units	GP	Service delivered personally by a physical therapist or under an outpatient	t physical therapy pl	
	Office or othe for the evaluation	1	GT	Via interactive audio and video telecommunication systems.		
		Modifiers	GY	Item or service statutorily excluded or does not meet the definition of any	Medicare benefit.	Ê
		#1	59	DISTINCT PROCEDURAL SERVICES		
			GA	WAIVER ON FILE		
	Favo	Note	25	Evaluation and Management service (E&M) is SEPARATE AND DISTINCT f	from the other proce	=+
	*0	Patient Authoriz	Q6	SERVICES FURNISHED BY A LOCUMS TENENS PHYSICIAN ( NO EFFECT O	ON PAYMENT)	
	Anesthesia fr procedures; p	Empty	TH2	FAKE: 2Therapies		•
	× in	11305 7	97	Rehabilitation Services		
	lesion, single	lesion, scalp,	96	Habilitative Services		
	Radiologic excervical; 2 or	72040     xamination, s       8 views     citizet				

2. Click on the **+Add** button at the upper right hand side of the pop-up.

Schedule	e Document and Bill B	illing - Workbench - S	Search - Reports - C	Config + Files + Versions + Apps Help + Wha	at's New?	Tabs 🗸 🖌 🍞
	CPT Se	arch query	Person Mod	difier Config 🥑	C + Add × Delete	<b>S</b>
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		P-A-R-T	GA	Synchronous telemedicir	ne service-95	
	Favo	Note	25	Evaluation and Management service (	(EKM) IS SEPARATE AND DISTINCT from the other proce	
	★ 🕅 Anesthesia fo procedures; p	Patient Authoriz	TH2	FAKE: 2Therapies		•
	★ Shaving of ep lesion, single	idermal or de Si lesion, scalp, le	97	Rehabilitation Services		
	Radiologic ex cervical; 2 or	72040       samination, s       3 views				

3. Type the code in the empty text box and select it from the list before clicking **Save**.



Clinicians can use a modifier not in the list by inputting the code using the empty text box in the modifiers pop-up.

# Auto Check-out by Appointment Type

This new feature allows the user to check-out patients based on appointment type.

> Please contact your Coach to learn more and enable this feature.

# **Schedule Alerts**

A new alert option has been updated to include Patient Balances that are Over or Under a set threshold.

-	Welcome, Dr. DEV PHYSICIAN 1 -	Smith Mon 12/19/22 10:48 AM E	ST (Loge	out)						<b>S</b>	299	×288 <b>×1</b>		8?
Sc	hedule Document and Bill Billing - Worl	kbench - Search - Reports 🤇	Config -	Files • Versions •	Apps	Help - Wh	nat's N	New?				Tabs 🕶	×	?
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GENERAL CHECKIN NOTIFICATIONS SELECTION NOTIFICATIONS APPT TYPES TYPE PAY				Party Services er										
	0		2 Prac	ctice	•	Attachmen	ts							
	News	Description	Syst	tem	•	Billing		Þ						
	Name A	Description			_	Contacts		Þ						
	Balance Over Rule`	Patient has a credit less than	\$100			Careplans		Þ						
	Birthday Notification	Happy Birthday!				Documenta	ation	1						
	CHUSA	xpiration	ı.	G	EHR Conne	ections	5		Kiosk Customizations	1				
	Last ReExam more than 25 days or	Last ReExam more than 25 c	days or 1	2 visits ago		Logins		Point of Sale						
	Last visit was over 30 days ago	This patient must be re-exam	nined. Th	ed. They haven't been in for at				• 4	4	Schedule Config				
	MEG CP TESTING	This CP CPT is exactly 1 visi	t from Ma	ax Total		PHI					1			
	MEG CP TESTING-CP EXPIRATIO	This CP CPT is expiring in 10	) days or	less		Reports		•						
	Missed Visits	You have missed 3 visits in the	he past 3	30 days or in the past	12 visi	Settings								
	Now ore non	Cabadula visita and Cara na	-				-							
	•													
	Name													
	Last visit was over 30 days ag	0												
	B													

Schedule Alerts can be viewed by clicking:

- 1. Config
- 2. Practice
- 3. Front Desk
- 4. Schedule Config

Under Schedule Config click on:

5. CheckIn Notifications

Welcome, Dr. DEV PHY SIC	CIAN 1 - Smith Mon 12/19/22 10:44 AM EST (Logout)		S <sup>5</sup> % <sup>99</sup> X <sup>283</sup> S <sup>1</sup> 87
Schedule Document and Bill Billing -	Workbench      Search      Reports      Config      Files      Versions      Apps Help      What's New	n	Tabs - 🗙 🔋
Home Schedule Config 🗷			
GENERAL CHECKIN NOTIFICATIONS SELECT	TION NOTIFICATIONS APPT TYPES TYPE PAYER MAP PROVIDER TODO TYPES OFFICE		
0			
Norma	Decodetion	Name	
Name A	Description	Last visit was over 30 days ago	
Missed Visits	You have missed 3 visits in the past 30 days or in the past 12 visits		
New care plan	Schedule visits and Care plan	Popup Message	
New Patient Alert	This is a new patient. Check your Task workbench	This patient must be re-examined. They haven't been in for at least 30 days.	
NFA	Patient has no future visits. Schedule more appointments.		
No Active Careplan	Patient is not on a careplan	Patient Facing Stop ON	
No Future Visits	This patient has no future visits scheduled	Show Popup Messages ON	
Re-exam Required	Re-exam is required on the 5th visit as per Payer		
Reexam Alert	Please remind the doctor that you are here for a reexam	Events Charling	
	•		
		Create XDoc	
		No XDoc	
		Rules	
		Turn on PRM reminder - enable PRM flag after 30 of days since the last visit	
		C Edit Rules	💼 🖺 Save

This new feature can be viewed by:

- 1. Selecting a notification by clicking on the line to show the notification details.
- 2. Clicking on the Edit Rule button.

ON	Add balance under rule	Has balance under 0 including copay
ON	Add balance over rule	Has balance over 100 🛛 🔽 including copay

From the newly opened window, find the following two rules along with copay inclusion:

- 1. Add balance under rule
- 2. Add balance over rule
- 3. Copay inclusion

Previously, the practice would look at the patient's actual balance at the time of check-in. With this new feature, by adding the copay, before the alert is created, it will access the copay field of the patient's account and add that into the patient's actual balance. This feature works for both of the rules shown above.

This new feature removes the need for the practice to manually add the patient's current copay to their balance. The feature automatically includes the copay for the current visit to their existing balance and will notify the user if the patient's balance has reached the threshold set by the practice.

# **Documentation Updates**

### FlexNote updates

New features for FlexNote are:

- 1. Creating tasks within the note
- 2. Highlights for unreviewed fields
- 3. Addendums for completed notes

### Creating tasks within the note

Tasks can now be created from within FlexNote.

	Consultation Note		•	_		
	Consultation Note 👻 Created: 12/16/2022 at 2:27 PM Encounter: 8/19/2022 at 11:30	:	?	¥8		~
	Paragraph $\vee$ <b>B</b> $I \ \cup \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	<u>*</u> ~	≣	Ξ	≡	≡
	$I_{\star} \equiv \checkmark \bowtie$	2	Add T	ask	Ne	w Field
1	Advised to follow up with another appointment on 01/07/2023					

This feature can be done by:

- 1. Highlighting the text (used as the task title)
- 2. Pressing the Add Task button.

Title	Task Details (Optional)
Advised to follow up with another appointment on 01/07/2023 Priority O Low O Normal O High O Critical	Paragraph $\vee$ <b>B</b> <i>I</i> <b>U</b>
Assign To Person O Role  devenusician1 - Dr. DEV. PHYSICIAN 1 - Smith - DEVELOPER DD	Attachments (Optional)
Due Date	Choose a file or drag here
emind me 0 day(s) before	

The new task window will pop up with the highlighted text as the task title. Additional Task details can then be set such as the **Priority Level**, **Assigned Person or Role**, **Due Date**, **Remind Me**(**Start Date**), **Task Details**, and **Attachments**.

After checking the details, click on the Add Task button. The task will now be created and visible on the owner's workbench.

This feature can be useful for internal reminders such as following up on future patient appointments.

#### Highlights for unreviewed fields

Unreviewed Fields will now be highlighted to remind the clinician to check the data if there are any relevant changes that should be updated.

Note: This feature only works with auto-salted notes, which have fields that contain prior information.

#### Addendums for completed notes

Clinicians can now add addendums to completed notes.



note.

History & Physical History & Physical Created: 12/16/2022 at 2:22 PM Encounter: 8/19/2022 at 11:30 AM Service Date: 8/19/2022	✓ Signed 12/16/2022 at 03:13 PM by KENNETH TAINO	<b>i</b> Document is hard signed (read-only)	: ?	ሾ & ↗							
NEW PATIENT – 99202 – KEY FACTOR: TIME This is a new patient evaluation for: Tester, Teresita Date of service: 8/19/2022 Chief complaint: headaches Initial History: Teresita Tester, a 30 year-old of unspecified gender presents to this office on 8/19/2022 complaining of mild headaches. The patient rates the headaches at 4/10. The headaches is present about 20% of the day. The patient needs to take frequent breaks throughout the day as a result of these symptoms. The patient stated that these conditions started one week ago. Since the time of onset, the condition shows no change. Due to this condition, the patient has slight difficulty doing work-related tasks for 30 mins. Symptoms are improved with rest, and worsened by body movement. This problem has never occurred in the past. The last episode was about 1 day(s) ago. The patient has never been to a orthopedist for this problem. Medication History: The patient is not taking any medications for this problem.											
Past Medical History:       The patient related no present or past problems. The patient does not have past history of surgeries.         Family History:       Patient's mother has/had diabetes.         Patient's father has/had cancer.											
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	$\equiv :\equiv \times_2 \times^2 \leq$		_ ~ ≡	₹₹₹							
			Cancel	Save Addendum							

Clicking the **Add Addendum** button will bring up a narrative area at the bottom of the page where clinicians can input an addendum.

#### **XDoc updates**

New logging features have been introduced to XDocs.

Logs are now available without opening documents.

Weicome, Dr. I	DEV PHYSICIAN 1 - Smith	h Tue 12/13/22 12:35 I	PM EST (Logout	)							<b>Ø</b>	×99 ×288	0 01
Schedule Document and E	Bill Billing - Workbenc	h • Search • Repo	ts ▼ Config ▼	Files • Versions • Ap	ps Help • \	What's New?							Tabs 🔹 🔀 🛛 🕐
Home Schedule 🗷													
987654321	Patient Month Week	Day (Office) Main C	ffice 🗸 🔍 Tue	12/13/2022 🖸 Tod	ay » Today's	s Practitioner •	Log • 0-1-2-0	2-2 ?					
Test	INFO CLAIMS TRANS	CASH FIN NOTES S	CHED VERIFY D	OC CP FILES REFERR	NL CLM MERGE	TASK FIELDS	Statement AJIA TES	ST Acct#. 987654321 👝					
Ajia	10/13/00 3 12/13	/22 🖪 🔇 👌 Se	arch Filter • Q	Action • Sel	ect All Copy	Edit Save N	ew XDoc Send Fax	Add Addendum View Log   Items: 1					
01/01/1000	10#	Namo	Sue Dt	Brouidor	Appet Turpo	Tomplato	Rianod?	Signatures	Date Lindated	Sign	Uncian	Doloto	Activato
- Phone 1 -	()#				Apprilype		Signed?	Signatures		Sign	Chisigh		
- Phone 2 -	1670952881729287159	Physical Therapy I	12/13/2022			Supernote			12/13/2022				
- Email -	48619032		03/08/2022	DR. JOHN	Massage	SOAAP3			03/11/2022				
- Assigned Phys -					2							-	
Clear Create More													
Alerts * 0 or fewer fut appt * Patient has a large													

The logs can be accessed by:

- 1. Selecting the document by clicking on the row
- 2. Clicking the **View Log** button

A pop-up will open containing the logs of the note.

Welcome, Dr. I	DEV PI	<b>S</b>	× <sup>99</sup> × <sup>288</sup> ≤0 ⊚?							
Schedule Document and Bill Billing + Wonkbench + Search + Reports + Config + Files + Versions + Apps Help + What's New? Tabs + 🗶 👔										
Home Schedule 🗷										
987654321	Patie	ent Month Week Day   (Office) Main Office 🔽   «	Tue 12/13/2022 Today » Today's Practitioner • Log • 0-1-2-0 2-2 ?							
Test	INFO	CLAIMS TRANS CASH FIN NOTES SCHED VERIFY	Doo CP Files REFERRAL CLM MERGE TASK Fields Statement AJIATEST Acct#: 987654321							
Ajia	10/1	3/00 🖸 12/13/22 📑 🕻 🕻 Search Filter -	Q D 🖨 Action - Select All Copy Edit Save New XDoc Send Fax Add Addendum View Log	Items: 1 ?						
01/01/1000	ID#	Logs for: Physical Therapy Initial Exam								
- Phone 2 -	1070	View Document 🛛 🔹 🖉 Items: 1		? Print						
- Email -	4964	User	Log	Log Date	Bookmark					
- Assigned Phys -	4001	devphysician1	Document Saved: Supernote 12/13/22	Tue Dec 13 12:35:28 GMT-500 2022						
Clear Create More										
Alerts * 0 or fewer fut appt * Patient has a large										

The logs displayed in the list will only consist of general changes to the XDoc as well as when a document is deleted.

#### Checking Physician Name

An additional field for physician names has been added in the copy pop-up in the **Doc Tab** to easily determine the name of the physician attached to the Patient's note.

Welcome, Dr. D	🔊 Welcome, Dr. DEV PHYSICIAN 1 - Smith Tue 12/13/22 12:24 PM EST (Logout) 🚱 🕅									
Schedule Document and E	Schedule Document and Bill Billing + Workbench + Search + Reports + Config + Files + Versions + Apps Help + What's New? Tabs + X 💡									
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987654321	Patient, Month Week Day (Office) Main Office V @ Tue 12/13/2022 C Today's Practitioner Log - 0.1-2-0 2-2 ?									
Test	Neo CLAMS TRANS CASH FIN NOTES SCHED VEREY DOC CP FILES REFERENCE CLAMMERCE TASK FIELDS Statement AUATESTAccet# 987654321									
Ajia	Physical Therapy Initial Exam saved 12/13/20, Select template to copy values from X									
01/01/1000	Save S	ign Off PDF Rename Edit	Template	Template Name	XDoc Name	Service Da	Physician Name	Date Updated		
- Phone 1 -				L						
- Phone 2 -	$\equiv$	Show/Hide Preview	Clea	Supernote	Physical Therapy Initial Exam	08/24/22	ALBERT DAVIS	08/24/22 1		
- Email -			-	Insurance Verification Level 1	Insurance Verification Level 1 03/08/22	03/08/22	ALEX JONES	03/08/22 1		
- Assigned Phys -	Dec Nov Oct		Oct	Supernote	Chiropractic Initial Exam	03/08/22	DEV PHYS	03/11/22 1	Mar Feb	Jan
Clear Create More				Supernote	Chiropractic Initial Exam	03/08/22	ALEX JONES	03/25/22 1		
Alerts			FlexNote	Initial Exam - Knee	03/08/22	DR. JOHN	04/19/22 1	CP: None		
* Do rewer nur appr * Patient has a large outstanding balance. Talk to patient about collecting. * Needs appt * Please set up navment	Patient Name: Test, Ajia Date of Encounter: 12/13/2022			***Beta - Supernote	Chiropractic Daily Note	08/07/20	DR. JOHN	08/06/20 1	-	
				Supernote	Chiropractic Initial Exam	08/06/20	DR. JOHN	08/06/20 1	PRIVATE PAY	Secondary: N
				Supernote	Chiropractic Initial Exam	08/05/20	DR. JOHN	09/28/20 1	2 M43.22 M47.812 M25.60 M62.81	
arrangement	Ball of Encounter. TETIORDEE							:5×1		

### Updating existing macros

Added a new confirmation dialogue when updating existing macros to avoid unintentional overwriting.

Welcome, Dr. I	r. DEV PHYSICIAN 1 - Smith Tue 12/13/22 12:31 PM EST (Logout)						
chedule Document and E	3III Billing + Workbench + Search + Reports + Config + Files + Versions + Apps Help + What's New?	Tabs 🔹 🗙					
ome Schedule 🛎							
7654321	Patient Month Week Day (Office) Main Office 🕆 帐 Tue 12/13/2022 💽 Today » Today's Practitioner - Log - 0.1-2-0 2-2 ?						
st	INFO CLAMS TRANS CASH FN NOTES SCHED VERIFY DOC CP FILES REFERRAL CLM MERGE TASK FIELDS Statement AJIATESTAcct# 987654321						
a /04/4000	Physical Therapy Initial Exam saved 12/13/2022 12:23:53 PM :68c1 - Test, Ajia (987654321)						
/01/1000	Sa Update Macro	×					
none I -	Name	Provider					
hone 2 -							
mail -	ATLANTIC CHIRO ASSOC - SUPERNOTE	123456789DEV					
ssigned Phys -	D 9/2 test macro initial	123456789DEV					
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lient has a large tanding balance. Talk to	A	123456789DEV					
ent about collecting.	ADJUSTMENT 3-4 REGIONS	123456789DEV a					
ase set up payment	ADL Testing Macro	123456789DEV					
gement	ADL test Update macro dialog	123456789DEV					
Popup On	Arcadia Knee Test   P Are you sure you want to update the selected	123456789DEV					
Patient	Assessment only test	123456789DEV					
Dec 1 K.Test 1 ^	Back Procedure Yes No	123456789DEV					
Dec 1 K.Test 1	Blank macro test 2	123456789DEV					
Dec 1 K.Test 1	CHIRO PLAND 98942AT	123456789DEV					
Dec 1 K.Test 1	Cervicalgia Test	123456789DEV					
Dec 1 K.Test 1	ChiroTemplateTest1	123456789DEV					
Dec 1 K.Test 1	Clariant Test	123456789DEV					
Dec 1 K.Test 1	Daily - boxes unchecked test    03.03.2022	123456789DEV					
Dec 1 T.Patient	DiabetesSampleMacro	123456789DEV					
Dec 1 T.Patient	Diagnosis Macro	123456789DEV					
Dec 1 T.Patient	DizzySpelis	123456789DEV					
Dec 1 T.Patient	Doctor Apurva	123456789DEV					
Dec 1 T.Patient	Allergies:						
Dec 1 P.Velu	Medications: Lateral Texton (45-) Left Active WNL	Passive WNL					
Dec 1 P.Velu	Normal : B I U = = = = 9 19 4/2 I = = Right Active WNL	Passive WNL					
Dec 1 P.Velu	Rotation (80°)	Decrive WNI					
Dec 1 P.Velu	Bo to bo lo lo to to bo lo to						
Dec 1 P.Velu	Assessment						
Dec 1 P.Velu	Diagnoses Codes						
Doc 1   Baton	1. MS4.2 Cervicalgia						

# **Patient Portal Optimizations and Updates**

#### New Global setting for Patient Portal links

This new setting allows the practice to choose their preferred version of the patient portal.

The new practice-level setting, patient\_portal.version, accepts 3 values:

- > CARETOME: All patient portal links will automatically be for CareToMe.
- > LEGACY: All patient portal links will automatically be for the Legacy Portal.
- BOTH: Users will continue to have a toggle on the interface and be able to send a link to either version of the portal.

This update makes it easier to control which portal the practice uses.

#### Logging

Patient portal logs include which version of the portal was used, the actual link sent, as well as the delivery method whether it was directly from the system or copied to be sent as an email.

#### **CareToMe Patient Portal Updates**

Providers can have the Medications Chart Component viewable by patients on CareToMe.

≡	My Prescriptions						
Velcome to Getwell Demo Clinic	← Back to My Profile						
KOR	Hy Pharmacy Information	> Escitalopram Oxalate Active					
↑ Home	👑 My Allergies	> 20mg / null					
💮 Appointments	R. My Proscriptions	(S Add'l Sig 🔂 Sep 07, 2022					
ط Messages	X Hy resciptions	Adderall X R (dextroamphetamine-amphetamine)					
My Profile		25mg / Take 1					
My Care Documents		🕓 Add'l Sig 🛅 Sep 29, 2020					
Fill Out Paperwork		Escitalopram Oxalate Active					
My Account		20mg / null					
		🕓 Add'l Sig 💼 May 12, 2020					
		Hydralazine					
Log Out		10mg / Take 1 tablet by mouth daily					
v2.4.6		🔿 Daily 🛱 Oct 20, 2022					



This feature can be accessed in the CareToMe Patient portal by:

- 1. Clicking on My Profile
- 2. Clicking on Medication

## **Reports**

Appointment Type Summary report can now display the unique patient count for each appointment type by hovering over the total number for a specific provider.



# **System Updates**

Kiosks

When multiple appointments for the same patient are checked in at the same time, the kiosk now only shows one copy of the configured documentation.

#### Reports

- > Monthly Invoice
  - Added a "Confirm All" button to automatically mark all entries as confirmed, preventing users from having to click each item in the report.

#### XDocs

- > Supernote has been optimized for better speed & performance.
- > Added a fix for pop-up windows opening beyond the screen preventing access to the close button.

### App Store

App Store will now always be visible for users listed as their owners, even if the store is limited in visibility (eg, provider tags)

### Billing & EHR

- ➢ Menu → Task Checklists
  - $\circ$   $\;$  Task checklists are now alphabetized for ease of use.

### FIC Map

> Now has a new interface for easier searching & updating of FIC Mappings

### Third-Party Apps

- > WebExercises is now updated to use the full amount of available screen real estate
- > Kaizenovate is now available in production servers.

#### Tasks

- > Billco-configurable User Role options
  - The list of user roles available when practices open a new task can now be limited to simplify task creation for practices.
    - task.allowed\_user\_role\_for\_new\_task

### Service Facility

Added a warning when making updates that affect facility visibility for practices that have user(s) with limited service facility access.

# **Bug Fixes & Minor Changes**

- ≻ Fin tab
  - Automatically remove extra whitespace in the AMT fields (prevent error when hitting Dist w/ a non-number in the amount)
- ➤ EMR Not Created
  - Fixed issue where switching from cash to non-cash physician would prevent saving XMR in some cases
- Provider Edit > Settings (basic)
  - Prevent IH practices from setting up automatic PIP write offs (NJ PIP Capitation)
  - Automated write-offs do not work with the IH PIP Process; they happen before the claim can be submitted.
- > Fixed issue with date range in Communication Logs
- ➤ Bill & EHR  $\rightarrow$  CPT Widget
  - Fixed issue where widget would close immediately upon adding dx link
- > Fixed error shown when searching for POS code
- > Scheduler
  - Fixed issue where appointment & patient counts did not update when switching between day & week view multiple times
- > Careplan
  - Users can now delete the note from an existing careplan (previously would not allow content to be cleared completely)
- ≻ Login
  - Logouts caused by inactivity will redirect to the new login screen
- > Fixed the drop issue of the NDC Selection in the Billing Preview Screen of Document & Bill.
- > Layout issue
  - Fixed issues where Copy... popup would be obscured by the navigation toolbar
- > Patient Account → Files
  - Prevent adding duplicate entries, resulting in showing the same file twice (and "both copies" being deleted in a single action)