Insurance Departments

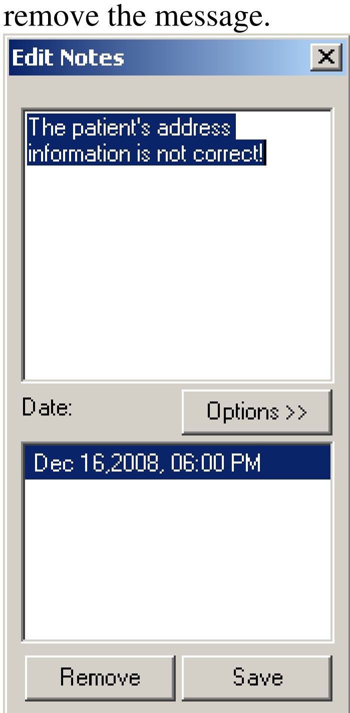
Item 57566 – Pre-auth Warning When Planning Procedure
Module: EHR – Chart Add, Treatment Planning
Issue: In Chart Add and Treatment Planning there is no warning when adding a procedure that requires pre-authorization. This warning occurred in Transactions, but not in the EHR. This would enable the provider to plan appropriately for the next visit, such as obtaining necessary models or x-rays required with the pre-authorization.

Enhancement: The system now displays a pre-authorization warning when adding a treatment in Chart Add or Treatment Planning that requires pre-authorization.

Item 68639 – Notify Wrong Address When Patient Selected
Module: General – Sticky Notes Issue: Users need some way to be notified that a patient's address needs to be updated (for example, when a statement is returned).

Enhancement: In the Patient Card – Personal tab, there is a new checkbox 'Address is Incorrect'. When checked, the system will display a sticky note when the patient is Checked In and when selected in the Rolodex.

If this notes come up, please verify the patient's address. Correct the information and remove the message.

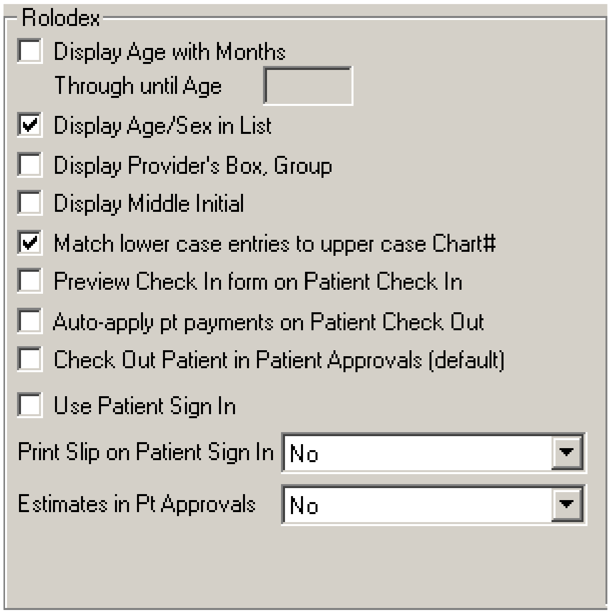


Item 34322 – Report Showing Specific Transaction Types
Module: Info Manager – Practice tab – Transaction Report Issue: Need to generate a list of transactions similar to what A/R Reconciliation Report produces but by individual transaction types.

Enhancement: The new Transaction Report is accessible through the Practice tab. In the Category section, click Transaction Report to display the Transaction Report window. Select the type of Transaction you would like to report on. This report can be run 'for All' or 'for Dept' and can be Grouped by various criteria.

Item 66120 - Case Sensitivity Searches
Module: Maintenance - System tab – Station Options Issue: Need case-sensitivity options when searching for Chart #.

Enhancement: Added a Station option for case sensitivity searches (for searches based on Chart # only). For those accounts that can access the Patient Options in the Patient Card check the box called 'Match lower case entries to upper case Chart#'.



This will be fixed so when you search for a chart by S, P, C, K, etc, you will no longer have to use the upper case letter for searching.

Item 34734 – Guarantor Update

Module: Patient Card – Edit Patient Issue: When changing a patient's address, the guarantor's record may require the same address change. The system lacks the ability to do this automatically. Updates must be entered manually in the Guarantor tab.

Enhancement: When changing a patient's address, upon saving, the system searches for guarantors in the patient's record (other than the patient themselves). If guarantors exist, the system displays the new Updated Addresses dialog box listing guarantors and emergency contacts. By default, all items in the dialog box are selected. When you click OK, the system updates all address fields for the selected guarantors and emergency contacts.

Item 46489 – Emergency Contact and Guarantor Addresses

Module: Patient Card – Clinical and Guarantor Issue: The system lacks the ability to copy a patient's emergency address from their home address. This must be entered manually in the Clinical tab.

Enhancement: In the Clinical and Guarantor tabs, there is a new Same as Pt button. Click this to copy the patient's address into the Emergency Contact or Guarantor's address. If you later update the patient's address, the system prompts you and gives you the option to update their Emergency Contact and Guarantor using the same address.