

What's New in Medisoft 15 SP2

This service pack offers many new corrections, improvements, and enhancements to help you manage your practice. Some of the highlights include:

9322 – Modification: Medisoft and Office Hours Professional Now Install in the Same Directory

Modified the installer to install the Office Hours Professional program in same directory as Medisoft. This path is a default option; users can select a different directory, if needed, when installing Office Hours Professional. Also, Medisoft must be installed first for Office Hours Professional to identify the path and then install the application in this location.

10632 – Correction: Unprocessed Transactions Window Resizing

Corrected an issue with the Unprocessed Transaction window not staying in a maximized state (fully opened) after editing an unprocessed transaction.

For more information on Unprocessed Transactions, see Unprocessed Transactions Overview, Unprocessed Transactions Main Window, and Unprocessed Transactions Edit Window.

13518 – Correction: Returned Walkout Receipts to the Open Report Window

Returned Walkout Receipt reports to the Open Report window, accessed from the Reports menu, Custom Reports List command. Note: in most cases, you will usually run the reports from the Transaction Entry using the Quick Receipt or Print Receipt buttons to bind the receipt to a specific record.

For more information, see Transaction Entry – Buttons. For more information on the Quick Receipt Feature, also see Program Options - Billing Tab.

13686 – Correction and Enhancement: Eligibility Icon Display and Eligibility Verification Logic

Corrected an issue with red X eligibility icon appearing on the Appointment grid in Office Hours and Office Hours Professional for practices that are not using eligibility verification.

Also modified eligibility verification logic in Office Hours to enhance performance. Eligibility is now checked or updated manually by users on a case-by-case basis or checked via a batch process such as a scheduled eligibility verification run set up in the Task Scheduler.

For more information on setting up a task, see Task Scheduler and Eligibility Task. For more information on eligibility, see Eligibility Verification Overview and Ways to Verify Eligibility.

13688 and 15681 – Enhancement: Include the “Patient” Flag on a Default Record or Template

Modified the Patient window Set Default feature and the Patient Quick Entry Template. These features now support selecting the Flag drop-down list as a default setting in new patient record.

When using the Set Default feature, you can create a new patient record, and on the Other Information tab of the Patient/Guarantor window, you can now select a value from the Flag drop-down list. Choices are labeled and display the default color code (assigned on the Color-Coding tab of the Program Options window). After you make this and other selections and click Set Default, these values are then used in your next new patient record.

When using the Patient Quick Entry feature, you can create a new patient template (Lists menu, Patient Entry Template) that includes the Flag drop-down list. You can also assign a default value which would populate when you use this feature to create a new record (Activities menu, Patient Quick Entry).

These options need to be set up separately; setting one does not set the other.

For more information on Patient Quick Entry, see Patient Quick Entry Overview, Patient Entry Template Edit Window, and Patient Quick Entry Window.

For more information on the Set Default Feature, see Patient/Guarantor Entry.

15654 – Modification: Set Default Feature is Including the User Code

Modified the logic of the Set Default feature. If you had added the User Code field to the Patient List grid and have multiple users, the Set Default feature was displaying in the User Code field the User ID of person that set the defaults using the feature, not the person that actually uses the defaults to create the new patient record. Corrected this situation by removing the logic that had linked User Code field to the Set Default feature. Now, if the User Code field is added to the Patient List grid, the field will contain the User ID of the person that creates the new record.

For more information on the Set Default Feature, see Patient/Guarantor Entry.

15686 – Correction: Visit Number Field Increment Logic

Corrected errant logic for the Visit Number field. If you have added this field to the Transaction Entry grid, the previous logic was causing the Visit Number field to incorrectly increment when a note was added to an existing line item in a case with multiple transaction entries. The new logic ties Visit Number increment to occur if a transaction date is edited or when the line item is the first in the series.

For more information on adding a field to a grid, see Grid Columns.

15711 – Enhancement: New Patient Quick Entry Data Duplication Logic

Added logic to the Patient Quick Entry feature that now checks the practice database for duplicate social security numbers when creating a new record and entering a social security number. If the social security number is already in the database, the application will display a warning message when you save the record. You can then modify the record and save it.

For more information on Patient Quick Entry, see Patient Quick Entry Overview, Patient Entry Template Edit Window, and Patient Quick Entry Window.

15747 – Correction: UB Claims Printing Logic

Corrected an UB-04 claim printing issue. The logic was not pulling the correct data for box 43 and was printing the description of the procedure code instead of a description of the revenue code.

For more information on UB-04 claims, see UB-04 Claims Overview, Turning On UB-04 Fields, and Clickable UB-04 Form.

15771 – Correction: Telephone Number Update Logic in Office Hours Professional

Corrected telephone number update logic in Office Hours Professional. Updating a telephone number in the Patient /Guarantor window (launched in this case by selecting an appointment on the Appointment grid and pressing F9 and then pressing F9 in the Edit Appointment window in the Chart field) would produce a WorkQuery Error 7200 message. This service pack corrects this issue.

15877 – Correction: Show Remainder Only and Show Unpaid Only Boxes Saves Last Selection for Next Use

The Show Remainder Only and Show Unpaid Only boxes on the Apply Payment / Adjustments to Charges window were not holding the checked or cleared status when the window was reopened from the Deposit List. For instance, if the Show Unpaid Only box is selected and the window was closed but then reopened from the Deposit List, that previous state (checked) should have displayed when the Deposit List reopened. This service pack corrects this issue.

For more information, see Deposit List and Apply Payment/Adjustments to Charges.

15927 – Correction: Using the Case Window/UB 04 Window with the Set Defaults Feature

Some users that actively generate UB-04 claims have encountered a 7057 error message when entering new UB-04 information. This situation only occurs if users have clicked the UB04 button on the Case window and then on the UB-04 window (displayed in the Case window) selected the Set Default box on the Case window. Using the Set Default button with UB-04 case data was causing this error because the logic was not excluding some of the unique UB-04 data that should not be set as a default.

If you used the UB-04 feature or plan on using it now or in the future but have never clicked the Set Default button for UB-04 window displayed in the Case window, this update when installed corrects the problem and no other action is required.

If you have encountered this error or even if you have not encountered the error but have clicked the Set Default button with UB-04 case data, you will need to install this service pack

and also contact Medisoft Customer Support. Customer Support will need to run a utility to modify a data table in the database—installing the update only will not correct the error.

For more information on the UB-04 claims, see UB-04 Claims Overview, Turning On UB-04 Fields, and Clickable UB-04 Form. For more information on the Set Default Feature, see Patient/Guarantor Entry.

16025 – Correction: View Transactions Button in Apply Payment/ Adjustments Window

Corrected an error that occurred when posting insurance payments and moving between the Apply Payment / Adjustments to Charges window and the Transaction Entry window via the View Transaction button on the window. When moving between the windows after opening the Transaction Entry with the button, the application was producing an error when the View Transaction button was clicked after the initial movement between the windows.

For more information, see Deposit List, Apply Payment/Adjustments to Charges, and Transaction Entry.

16044 – Enhancement: New Columns and Sorting Options Available in Deposit List Detail Window

Added new sorting functionality to the Deposit Detail grid. After launching the Deposit List from the Activities menu, and adding/applying a deposit, you can select deposit and click the Detail button to use the new sorting functions to view the order in which the deposit was posted and view the applied deposits in relation to the payments.

Use the Charge Reference column to sort charges and deposits in a linear order with the charge from the Transaction Entry appearing first, followed by the applied portion of the deposit to the charge. The Charge Reference column is removed from the grid when you select the Hide Charges box. In this case, the Charge Reference column is not needed since it is used to link charges to their respective deposits. When you clear the Hide Charges box, the Charge Reference column returns to the grid unless you have removed it from the grid.

Use the Entry Number column to sort the Deposit List in the order in which the charge or deposit was entered. The sorting gives you a historical snapshot of the order and your actions with creating the charges and applying deposit.

Select the Hide Charges box to quickly sort the Deposit List by applied deposit line items.

When the Deposit Detail window opens, it initially sorts using Charge Reference number followed by the Entry Number. Click any of the Deposit Detail grid columns to sort the grid in ascending/descending order. Note: the Patient Name and Unapplied Amount do not sort when clicked.

For more information on, see Deposit List and Deposit Detail Window.

16090 – Correction: Error Using the F10 Key for Eligibility Verification in Office Hours

Corrected an issue with using the F10 key for Eligibility Verification in Office Hours Professional. In some instances, users would intermittently receive a 607 error message, usually when

verification was attempted for the first time for a patient. Updated database table population logic to correct the problem.

For more information on eligibility, see [Eligibility Verification Overview](#) and [Ways to Verify Eligibility](#).

16160 – Modification: Custom Report Loading Logic

Corrected custom report loading logic. After creating a new walkout receipt style report in the Report Designer, the application was not running the new report. Running the newly created report produced an error.

For more information, see the topic [Report Designer and Create New Report](#).

16348 – Enhancement: New Options for UB 04 Claim Report

Added new options to the UB 04 custom report/claim to address different carrier requirements. Previous versions of Medisoft included the Group Transactions by Revenue Code box is for use with the UB-04 claim form. If you check this box, the amounts of all transactions containing the same assigned revenue code are added together and placed on a single line in the UB-04 form.

When you select this box, the Date Included button is also selected by default—a new option. You can keep this setting or select the Date Excluded button—also a new option. These options address the need that different UB 04 claims users might have. In some situations, carriers require the grouping to include the date while others do not need the date. Check with your carrier and, if needed, create your own specific version(s) of this report using the Date Included or Date Excluded options.

If you need to group transaction by revenue code you will need to either build your own custom UB 04 claim report or modify the system supplied UB 04 report by opening the Medisoft Report Designer and using the Open Report option to select the UB04 (Primary) report. Then select the Report Properties command from the File menu and click the Group Transactions by Revenue Code box. Select either the Date Included (default selection) or Date Excluded. Click OK. Save the report using a new name, if desired, and run the report from the Reports menu in Medisoft.

Also added internal logic to improve internal report production and enhanced report layout.

For more information on the UB-04 claims, see [UB-04 Claims Overview](#), [Turning On UB-04 Fields](#), and [Clickable UB-04 Form](#). For more information on Custom Reports, see [Report Designer](#), [Create New Report](#), and [Report Properties - General Tab](#).