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# Product Release Document

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| Product: www.practicesuite.com | Version: 16 |
| Release Date: 12/14/2012 | Maintenance Release: 16.5.5 & 16.5.8 |

| Sl # | Module | Issue Type | Description |
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| 1 | Reports | N | Following new reports are added under Report Central<br>a. “Payment Activities Report” under Charges & Payment section<br>b. “Month End Close by Service Location Report” under Financials section<br>c. “ICD Count By POS Report” under Financials.<br>d. “Detail ERA Report” under Financials.<br>e. “Charges Billed By Month By Provider Report” |
| 2 | Reports | E | The following enhancements are made to the below reports<br>a. Export to excel option added to Payment level summary on the "Patient On-Account Balance Analysis Report"<br>b. Legal Entity filter and Multi sorting option added to “Claims Detail Report”. Additional option for exporting the report to excel with insurance and claim date grouping.<br>c. Added filters - “Last Modified Date From” and “To” and Modifier to the Summary - Encounter Line Activities Report. Service location and Rendering provider fields added to the report.<br>d. PDF export option added to Detailed - Insurance Aging Report”. Option to export the data to a summarized excel format.<br>e. A checkbox to filter out zero payments added to “On Account Payment Report”.<br>f. Posting Detail Report to include a filter named “Source” to show manual or auto posted lines. PDF and Excel report to include Deductible, Copay, Co insurance, Check # and Entry date fields.<br>g. Referral Source field is included in the “Patient Details Report”. New filter |

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| | | | named Patient scheduled from and to added for data extraction.<br>h. “Summary - Insurance Aging Report” to include additional field - Estimated Payment Percentage to indicate the average percentage paid by the payer.<br>i. Provider and aging date range filter added to the “Detailed Insurance aging report”. New fields - Provider name and Provider Code added to the report.<br>j. The date displayed on “Patient Balance as on date” in Patient Statements to be the actual date the statement was generated.<br>k. NPI and Tax ID to show on the PDF header of the “Patient Charges/ Payment History Report”.<br>l. Service Location field added to “Detailed Encounter Line Activity Report”.<br>m. Accounting date filter option added to “Patient(s) Payment Detail Report”.<br>n. Demographics report to exclude inactive insurances.<br>o. Modification Date and time fields to show on the Super bill Tally Report.<br>p. Export to PDF option added to Missed/Cancelled Appointments Report.<br>q. Insurance level added to Batch Summary->Claim Log.<br>r. Provider filter added to “Patient Financial Summary by Legal Entity” Report. |
| 3 | EHR | N | The following new functionalities are added in EHR<br>a. Whenever an encounter is saved, the following items will be populated under clinical summaries on the face sheet to report MU objectives outside of the patient visit.<br>a. EHR INFO. REQUESTED NO<br>b. EHR INFO. PROVIDED<br>c. REMINDERS SENT<br>d. MEDICATION RECONCILIATION REQUIRED<br>e. MEDICATION RECONCILIATION PERFORMED<br>f. REFERRAL SUMMARY REQUIRED<br>g. REFERRAL SUMMARY PROVIDED<br>b. When a chart is saved as complete an MU Dashboard is displayed which shows the relevant MU information. |

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| | | | c. The Clinical Summary (CCR/CCD) report is available for printing for office visits on the EMR save confirmation page.<br>d. The image saved as part of the chart is is embedded as part of the narration.<br>e. MU reports are refined to accommodate the new changes. A help video is provided for each MU objective.<br>f. An exception report is provided for MU report.<br>g. CDSS master and schedule option are available under EMR Admin.<br>h. Medical History is included as part of the problem list on the face sheet.<br>i. A new option “Append Created by info in Completed Encounter” and “Append Completed by info in Completed Encounter” is provided in EMR Options. These options will determine the electronic signature of the narration.<br>j. MU Report Core Criteria# 4 numbers used to include both current medication and prescription. The report is corrected to count only prescription to match the rule.<br>k. When Super bill is generated from EMR, the patient’s last billed case will be defaulted to.<br>l. Ability to assign/change case from clinical Desktop. |
| 4 | EHR | B | The following bugs are corrected in the EMR module<br>a. Right click context menu is not getting populated sometimes.<br>b. Uploading the document using Firefox causes a popup window to appear unclosed.<br>c. The delay in pulling the current medication. |
| 5 | Patient | E | Warning message on save in Patient demographics to indicate if any or one of the following information is absent for the patient - Race, Ethnicity, Preferred Language, Gender, Date of Birth.<br>The preferred language field moved to Additional information section on the main page. |
| 6 | Payment Entry/Posting | E | a. Added an option to view payment information for Fully Applied Payments.<br>b. The refund tracking message is auto displayed on opening of the payment Duplicate check warning message validation activated in payment entry.<br>c. Refund option included to “NEW” payments<br>d. Clicking on the Applied Amount on the payment listing page to display the Posting |

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| | | | details report for the payment. |
| 7 | Case | | a. Closed Cases are excluded from listing on the Case Switch screen.<br>b. Voided Cases to appear in red color text and Closed Cases in orange color text on the Case selection dropdown of the Charge Entry and scheduler screens.<br>c. 'Case Type' to be auto defaulted from Practice Options. |
| 8 | Scheduler | E | Resolution issue on Ipad's scheduler is resolved. |
| 9 | Authorization | | New function added for Private (Self) Authorization. |
| 10 | Charge Master | E | a. New columns - Rev. Paid and Rev. Adjusted are added in the in Reverse processing page.<br>b. Floppy icon replaced with the standard Save icon on the Encounter Details sections.<br>c. COB checkbox option added at line level. |
| 11 | ERA | | a. Secondary payments processed before Primary are indicated by a shaded color (highlight) on the ERA Posting screen.<br>b. Ability to create payments from ERA where there is just the check information and no service line information.<br>c. Browser compatibility issue has been resolved. |
| 12 | Scheduler | E | a. "Cancel Appt." button moved to position below Schedule Status<br>b. Added the option to print the scheduler to a PDF reader.<br>c. Default time to be driven from the scheduler options.<br>d. Warning message to be displayed if a void or closed case is selected when adding a new appointment. |
| 13 | Charge Entry | E | "On-Account" link renamed to "Post Payments". |
| 14 | Eligibility Authorization | E | Resolved the browser compatibility issue with Eligibility Authorization module. |
| 15 | Collection Manager | E | a. INS. Paid, Pat Paid, Adj. Amt are listed as part of the Denial Category Details section.<br>b. Changed the button label "Re-bill & Generate" to "Re-bill & Batch". Renamed |

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| | | | 'Comments' to 'Follow-up Hx'. |
| 16 | General | E | a. Users can raise a support ticket by clicking on the Customer Service icon.<br>b. A chat icon is provided within the application to initiate a chat request with customer support representative. |
| 17 | UB04 | E | a. Statement Covers Dates to copy to DOS from and to dates<br>b. Admission date fields are made non – mandatory.<br>c. Ajax search for Principal & Other Diagnosis Codes. |
| 18 | Open-Close period | E | Financial year open/close period setup screen to include previous two years. |
| 19 | Group Login | B | Password reset issue related to group login is resolved |