February 5, 2020

MedicWare

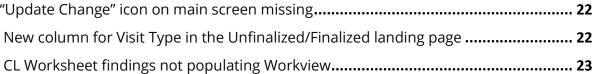
Release Notes

R8, Version 2.02



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EYE CARE L E A D E R S 5

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1. OVERVIEW

This document contains important information about myCare iMedicWare Version R8 2.02. This content reflects the series of enhancements and changes made to the system during the release.



SETTINGS

Change to Rx Status back from Emdeon

A new call has been implemented in the API calls between Emdeon eRx and IMW. The system will now only bring in the Active status of an existing medication from Emdeon. If the medications are marked as Lapsed in Emdeon then this status will follow over to IMW. The new call will allow for the status of medications to be matched and the same whether you are looking at IMW or Emdeon.



approximation and a second sec	Dosage	Status
rescription	0.05 % eye drops	Lacsed

Variable Help Section (Settings)

Variable Help section would help the user recognize which variable is available where and in which Document Type. It is basically a guide which will help the user understand and become much more used to the system.



Variable Help			<u>रि</u>	Smith, Aaron - 6	9464	×				
VARIABLE NAME Search	Q COLLECTION	CONSENT	CONSULT	EDU/INS	PT. DOCS	OP. NOTE	RECALL	PRESCRIPTIONS	PANELS	STATEMENT
{2 Degree/W OD}	Search for Variable							Í		
(2 Degree/W OS)								⊻		
{3 Degree/W OD}								1		
(3 Degree/W OS)								1		
{A & P_V}			1							
{A & P}			1	V	⊻	1				
{ADDRESS1}	ſ €	V	1	V	V	1	V	☑	1	
(ADDRESS2)	ſ €	≤	1	☑	V	1	☑	☑	1	
{ADDRESSEE_ADDRESS}			1							
{ADDRESSEE}			1							
{ADJUSTMENT}										1
{AGE}		≤	2	1	V	2		≤	1	
{ALL_INS_CASE}		≤								
{ANTCHAMBER_OD}			1	1		2				
{ANTCHAMBER_OS}			1	V		1				
{APPT COMMENTS}					Ń					
{APPT DATE_F}				√	☑		☑			

Patient Nick Name Variable (Clinical)

The variable list has been extended to include the nick name variable for all letter and form types.

{PATIENT_NICK_NAME}
{PATIENT_NICK_NAME} variiable for all most used categories like Consents, Consult, education, instructions, op-notes, pt-docs

CPT Preference for Custom Templates (Settings)

To make this more user friendly and customizable for the user the following changes have been introduced. For a Custom template, the **Options** can be defined by the user. The user can now also set the CPT preferences related to these **Options** as well.

	TEST NAME			
2	A/Scan	Edit Record		
1	B-Scan		n	
-	Laboratories	Test Name Custom test ten	Order By Dev, iMW	
	Cell Count	+ Add options		
	ICG	Performed By	Diagnosis	
7	HRT	iMW Dev	Select	
	VE			

Go to Settings > Clinical > Test Templates > Custom Test Template and Save.



Test Name Custom test ten	Order By Dev, il	MW - Order Date	DOS
+ Add options		OBSERVATION	E
Performed By	Diagnosis	Probable findings	
iMW Dev	Select		
PATIENT UNDERSTANDING		*Press <enter> key for Obser options</enter>	_
TEST RESULT 🕂 OD		options	_
		options	_
TEST RESULT 🕂 OD		options	Close

Select **+Add Options**, a pop-up will appear and enter your observations as needed.

Next step is to go to Settings > Billing > Test CPT Preferences.

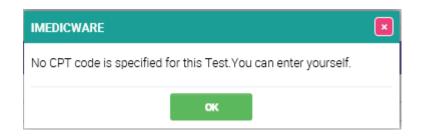
Select the custom test template you have just created. You can simply select the GREEN +. This will automatically create a new line and you can enter the CPT code that you wish to link. You can repeat this process to add additional CPT codes.

	SETTINGS				
Test CPT Preference			h, Judy - 7562 s River	3 🕌	
		 -			+
Cell Count					
		۲		92286	+
Contact Lens Fitting					
		۲		92310	
Custom test template				<u></u>	
		۲	0	92012	+
		۲	0	92083	
		۲	0	92015	

For custom templates which already exist, and you wish to link a CPT preference: The user will have to still open the existing custom test template. (**Settings > Clinical > Test Templates**). Simply open the template and SAVE it again. This will refresh the system and then allow you to see the custom test template under the Test CPT Preferences section and area. From here you do the process as described above.

If Custom Template is used in production and you try to assign a CPT code to the superbill and the message below appears then the custom test template's options have not been linked.





Privileges Pop-up (Settings)

Following are the Enhancement done related to Privileges:

Privileges				
ALL PRIVILEGES				
SETTINGS				
Admin	Y 🔽 Billing	Y 🗹 Clinical	Y 🔽 Documents	~
iASC Link	Y 🗹 iMedic Monitor	Y 🗹 iPortal	Y 🔽 Manage Fields	~
Optical Settings	Reports	V 🔽 IOLs	Y Scheduler	~
iOptical	Y Security	API Access		
CLINICAL				
Work View	 Tests 	Medical Hx	eRx	
Break Glass	Pt. Info. Sum.	View-Only	Financial - Hx CPT	
Purge/Delete Chart	Record Release			
FRONT DESK				
 Manager 	Scheduler/Demo	Sch. Override	Pt. Override	
Lock/Block Schedule	View-Only			
ACCOUNT/BILLING				
		Done		Close

- a. All Privileges Checkbox Once this Check box is checked off; all privileges would be checked off automatically, except the Special privileges.
- b. All Special Privileges are highlighted in a different color.



ivileges				×
ALL PRIVILEGES				
SETTINGS				
Admin	Y 🔽 Billing	Y 🗹 Clinical	Y 🔽 Documents	~
IASC Link	iMedic Monitor	Y 🛃 iPortal	Y 🔽 Manage Fields	\sim
Optical Settings	Y 🛃 Reports	Y 🛃 IOLs	Y Scheduler	~
iOptical	Y Security	API Access		
CLINICAL				
Work View	Tests	Medical Hx	eRx	
Break Glass	Pt. Info. Sum.	View-Only	Financial - Hx CPT	
Purge/Delete Chart	Record Release			
FRONT DESK				
Manager	Scheduler/Demo	Sch. Override	Pt. Override	
Lock/Block Schedule	View-Only			
ACCOUNT/BILLING				
		Done		Close

Contact Lens Charge setting (Settings)

Any CPT, belonging to any category can be now attached to Contact Lens under Settings > Billing > CL Charges.

SAVE TYPE	CPT PRACTICE CODE		
CL Check			ICD10 CODE
	99215	Edit Record	×
Evaluation	92310	Save Type	
Fit	92316	Refit	
Refit		CPT Practice Code	
		9	×
			~
		90471 90662	•
		90002	
		92002	
		92012	
		92014	-
		92015	
		92020 Save	Close
		92025	
		92060	

Default Location (Settings)

For a user: If there is a default location setup under Settings > Admin > User > User profile/record, the system would honor that location and that would be set as default when logging into iMW.



Login To Your A	Account
FACILITY Toms River SIGN IN Edit New Record	
FACILITY Toms River SIGN IN Edit New Record	
FACILITY Toms River SIGN IN Edit New Record	
Toms River SIGN IN Edit New Record	
SIGN IN Edit New Record	
Edit New Record	•
PROVIDER	
PROVIDER	
Provider Type P	

When the user, while logging in, enters their id and password, the default location should pop-up.

PROVIDER SLA: 00-11-10 0305 AM HIPAA: 08-14-10 00:15 AM DINFORMATION Provider Type Provider Group Speciality NPI# Taxonomy ID UPIN# Physician Billing Cornes ID NPI# Taxonomy ID UPIN# Prise First Name Midde Last Name Suffix Previder Signature Medicare ID Default Facility Aparval Aparval Sto ID Group Fed EIN# Medicare ID Section Timeout Aparval Aparval ID ID ID ID Strike Presses Select - Sto ID Sto ID Sto ID Sto ID Section Timeout Sto Index Appt / TS Color Max % Sto ID Brick, Spring Lake His, Sur, * P Enable Presse Select * Sto ID Custon User Name Ver Name Presse Select * Sto ID Custon User Name Grick, Spring Lake His, Sur, * P Enable Presse Select * Sto ID Custon	Edit New Record								×
Physician Billing Cornee Title First Name Middle Last Name Pie Bhavya Agarwal Federal Drug ID Lic# Mick Name Provider Signature Federal Drug ID Lic# Medicare ID Default Facility Federal Trug ID Lic# Medicare ID Toms River Social Social Social Social ScheDuLER Fedelity Sch Indez Appt / TS Color Max % Dot Bick, Spring Lake Hts, Sur(*) Enable Please Select * Stop Collect Refraction eRx Pessword	PROVIDER		SLA: 06-11-19 03:0	05 AM HIPAA: 08-	14-19 06:15 AM	ID INFORMATION			٦
Title First Name Middle Last Name Suffix Pederal Drug ID Lic# Medicare ID Ple Bhavya Agarwal Image: Suffix Pederal Drug ID Lic# Medicare ID Default Facility Image: Suffix Pederal Signature Image: Suffix Pederal Signature Suffix Medicare ID Default Facility Image: Suffix Image: Suffix Medicare ID Image: Suffix Suffix Seasion Timeout Image: Suffix Image: Suffix Image: Suffix Medicare ID Image: Suffix ScheDuLER Sch Index Appt / TS Color Mex % Image: Suffix Suffix </td <td>Provider Type</td> <td>Provider Group</td> <td>Specialty</td> <td></td> <td></td> <td>NPI#</td> <td>Taxonomy ID</td> <td>UPIN#</td> <td></td>	Provider Type	Provider Group	Specialty			NPI#	Taxonomy ID	UPIN#	
Pie. Baaya Nick Name Provider Signature Oefsuit Facility Adarwal Toms River Sealon Timeout 6 Hrs. Sto ID ScheDuLER Penale Facility Sch Index Please Select Sto ID ScheDuLER Penale Facility Sch Index Please Select Sto Physician Outcom User Name User Name User Name Oliect Refraction eRx Pessword	Physician -	Billing	- Cornea		•	1234567811	45678123		
Nick Name Provider Signature Offault Facility Image: Constraint of the second of the seco	Title First Name Middle	Last Na	me	Suffix		Federal Drug ID	Lic#	Medicare ID	
Default Facility Prese Select Toms River State Session Timeout State 6 Hrs. State SCHEDULER Provide Provider Pro	Plei - Bhavya	Agarw	al						
Default Facility SMS ID Toms River SMS ID Session Timeout SSO ID 6 Hrs. Image: Son Dimensional Constraints SCHEDULER PRIVILEGES Facility Sch Index Appt / TS Brick, Spring Lake Hts, Sur(*) Enable Please Selec * Image: Stop of the select Password Collect Refraction eRx Password	Nick Name	Provider Signature				Group	Fed EIN#	Medicaid ID	
Image: Content of the system Image: Content of the system Season Timeout So ID 6 Hrs. Image: Content of the system Scheduller PRIVILEGES Facility Sch Index Brick, Spring Lake Hits, Surr - Image: Content of the system Provider		$ \land$				Please Select			
Session Timeout 6 Hrs. SO ID SOLEDULER Facility Brick, Spring Lake Hts, Surt Please Selet Appt / TS Color Max % Detext Creater that Collect Refraction Collect Refracti Collect Refraction Collect Refraction Collect Refrac	Default Facility		\sim			SMS ID			
6 Hrs. Image: Constraint of the sector		•							
SCHEDULER Facility Brick, Spring Lake Hts, Sur(*) Enable Facility Brick, Spring Lake Hts, Sur(*) Enable Facility Brick, Spring Lake Hts, Sur(*) Facility Brick, Spring Lake Hts, Sur(*) Facility	6				~ _	SSO ID			
Schepulzek Sch index Appl / TS Color Max % Custom Brick, Spring Lake Hts, Surt • V Stop User Name Collect Refraction eRx Desmond eRx Password	6 Hrs.	•			<u> </u>				
Schepulcek Sch Index Appl / TS Color Max % Custom Brick, Spring Lake Hts, Surt * Enable Please Selec * Image: Strategy and the st						000000			
Facility Sch Index Appl 71S Color Max% Brick, Spring Lake Hts, Surt * Please Selet * Stop User Name bhevya Reset Password Collect Refraction eRx Password	SCHEDULER						Sx Physician	Direct Credentials Update Provider Photo	4
Direct spring case riss dur * Enduce Discy bibarya Reset Password Collect Refraction eRx Dessword			Appt / TS Color	Max %					
Collect Refraction eRx Username eRx Pessword	Brick, Spring Lake Hts, Sur(🔺 🗹 Enabl	le Please Selec +		•	Stop				
	1								
V Yes V NO							eRx Username	eRx Password	.
						💌 tes 🕖 No			
Save				Save				Close	

Record deletions or purges of Patient Chart (Settings)

When a chart is purged or deleted, an entry is added into the audit trail database table if audit trail is enabled in Settings > Reports > Audit Policies > Patient record Created/Viewed/Updated.

The user can run a report under Reports > Compliance > Audit to see purge and deletion related information for any patient.

Audit						Ars. SpLak	mith, Althea T - 26106 e	×				🛃 E
-	Audit Re	port			Report F	Period : 01-18-2020 to 01-18-2020			Created By	r: ID on 01-18-203	0 05:27 PM	
REPO			Pt Id	Module	Element	Original Value	New Value	Operation	Result		Date/Time	
욹	1	Smith, Althea	26106	Purged On	Purge		01-18-2020 D5:26 PM	Update	Success	ID	01-18-2020 05:26 PM	Name : 10.1.25.200
-	2	Smith, Althea	26106	Purged By	Purge		IMW Dev	Update	Success	ID	01-18-2020 05:26 PM	Name : 10.1.25.200
ORT FILTER	3	Smith, Althea	26106	Purge Status	Purge	Not Purged	Purged	Update	Success	ID	01-18-2020 05:26 PM	Name : 10.1.25.200
~												
		Session Tim	eout				🔘 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
		A/c Locked					🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
		Patient reco	rd Created/Viewed	l/Updated			On	O off	01-18-2020 05	20 PM		Dev, iMW
		Scheduling					🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
		Search/Quer	ry				🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
		Order					🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
		Login Auther	ntication Failure				🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
)		Signature Cr	eated/Validated				🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
1		PHI Export					🔿 On	Off	05-07-2010 08	:49 AM		Helpdesk, iMW
2		PHI Import					🔿 On	Off	05-07-2010 08	:50 AM		Helpdesk, iMW
3		Security Adr	ninistrative Events				🔿 On	Off	11-08-2012.07	:53 AM		Helpdesk, iMW
1		Back up and	Restore				O On	Off	12-17-2012 10	:57 PM		Helpdesk, iMW

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Lock down the "record release" screen (Settings)

The Print Patient Record is now enabled through the Settings > Admin > User, then going to the Record Release and checking it off – doing so disables other users from having this privilege and avoids the ability to pass this request to someone else who does not have the privilege set.

Edit New Record	Privileges	
PROVIDER	SETTINGS	
Provider Type	Admin	💙 🗹 Billing
Physician	iASC Link	iMedic Monitor
Title First Name	Optical Settings	✓ ☑ Reports
Pl€ ▼ iMW	iOptical	Y Security
Nick Name		
Default Facility	Work View	Contraction Tests
Toms River	Break Glass	Pt. Info. Sum.
Session Timeout	Purge/Delete Chart	Record Release

The two states of the Record Release checkmark are as follows:

Print Patient Record		Smith,	A Frank - 67056			
Glaucoma Flow Sheet	A/Scan					
CLINICAL SUMMARY		PAT				
🖌 All	Record Release	PATIENT FUTER	Mr. Smith, A Frank - 67056		Male (69 Yr.) 03-15-1950	Date of Service: 01-09-2020
Modification History	HIPAA		Mr. Smith, A Frank - 67056		Male (69 11.) 03-15-1950	
Chart Notes	This Visit:	3	23			IMEDICWARE TEST
	01-09-2020 •	×	10			PRACTICE Address:1405 Route 18 S. Suite #206.
Medical History	Include Provider Notes	$\langle \rangle$				Toms River, NJ 08755
Diagnostic Tests	Include Legal Forms					Phone: 7328179475 Fax:
Include Patient	Include Demographics		VISIT NOTES	DOS: 01-09-2020		PRINTED BY: ID on 01-10-2020 00:28:19
Amendment	and being apriles		MR. SMITH, A FRAM Male (69 Yr.) 03-15-1950	K -67056		
Include Patient Commu	nication		Language : English		Record Release turned of	f then the document is
			Race : White		immediately created for pr	inting.
EXCLUSION			Ethnicity : Not Hispanic of	Latino		
SUMMARY			Address : 1405 Route 18	S, Suite #206		
			Address 2 : Suite #206			
All			Old Bridge, NJ Phone No. : 732-555-1212			
	Active only All		Phone No 132-000-1212			
	Active only All		PRIMARY CARE	Sabo, Mildred		
🖌 Ocular Meds 🖉 🕘	Active only O All		PHYSICIAN:	Sabo, Mildred		
	Active only O All		Referring Physician:	Abate, Holly		
-	Ocular Health					
Consult Letters:			CHIEF COMPLAINT			
Nothing selected *			A 69 Yr. old male patient			
PATIENT INFORMATION			HISTORY			
All			The Patient has a history of I Testing for Jim, Test2 for JIM			ect IMW Testing ocular Had left eye infection

Here Record Release is unchecked, hence the document would print without the system asking for Disclosure Details.



Turned ON

Print Patient Record			Smith, A Fran	k - 67056		
Glaucoma Flow Sheet	A/Scan		Disclosed Deta	ils		×
CLINICAL SUMMARY		PATIENT				
All	Record Release	E 🔪	Disclosed By	Disclosed To	Specialty	Reason
Modification History	HIPAA		Dev, IMW	•		
Chart Notes	This Visit:	FILTER	Send mail to pa	itient on		
	01-09-2020 🔹	5	no email			
Medical History	Include Provider Notes	<	-			
Diagnostic Tests	Include Legal Forms			Cor	ntinue Printing	
Include Patient	Include Demographics					
Pop-up w	vindow will only appear if the "Re	cord Release	e" checkmark is turne	d on - if off then it will	directly generate the	document
i op-op ii	andow will only appear in the 14		e checkmank is tarrie		aneenty generate the	document.

Since Record Release is checked here, the user would be asked to add the Disclosure details.

Switch Facility Option (Settings)

Users can now change the facility they are working from by going to the Log In user ICON and changing the facility.



Select the logged in user icon. The User Settings popup appears. Select logged in facility name. A facility drop-down appears to select other facility. Select other facility from drop-down to switch the facility.



Ability to purge charts (Settings)

ALUNCO LOUGH	
Edit New Record	Privileges
PROVIDER	🗹 iASC Link 🗸 🗸
Provider Type	☑ Optical Settings
Physician	🗹 iOptical 🗸 🗸
Title First Name	
Pl∈▼ iMW	CLINICAL
Nick Name	Work View
	🕑 Break Glass
Default Facility	Purge/Delete Chart

Now the practice can setup and provide the ability to Purge Charts to specific people in the clinic. Settings > Admin > Users > Privilege.

There can be any number of users who can have these rights.

Alphabetize variables (Settings)

Variable Help	
{A & P}	
{ADDRESS1}	
{ADDRESS2}	
(ADDRESSEE_ADDRESS)	
{ADDRESSEE}	
{ADJUSTMENT}	
{AGE}	
{ALL_INS_CASE}	
{ANTCHAMBER_OD}	
{ANTCHAMBER_OS}	
{APPT COMMENTS}	
(APPT DATE_F)	
{APPT DATE}	
{APPT FACILITY ADDRESS}	
(APPT FACILITY NAME)	
{APPT FACILITY PHONE}	

The Settings > Document > Variable Help – now the list appears in alphabetical order, so it makes finding a variable easier.



ERA - Auto Posting – Self Service Options (Settings)

While the Actions are standard for many of the Reason codes, there are codes for which the action is dependent on what the Practice Policy is. Hence to overcome this, the Action on the Reason Code can now be defined per the Practice by going to Settings > Billing > Reason Codes > Action Type.

Edit Record	×
Reason Code	
C0 144	
Description	
Incentive adjustment, e.g. preferred product/service	
Action Type	
Write Off	-
Update Allowed Amount	
Adjustment (If Negative Amount)	
Save	Close

We have added 5 action types: Adjustment, Co-Insurance, Deductible, Denied, and Write Off".

If "Settings > Billing > Reason Code > Action Type" is "Write off" then 2 more options will appear: "Update Allowed Amount", and "Adjustment (If Negative Amount)"

- a. If Write Off action type is selected, then write-off transaction will take place.
- b. If "Update Allowed Amount" is checked then write-off transaction will take place and procedure allowed amount will also update.
- c. If "Adjustment (If Negative Amount)" is checked and CAS Code has a negative amount, then adjustment transaction will take place.

The Practice will see the default action types for the codes which have already been present in the system.

Note: For any Reason Code- if the Action Type is not selected, <u>no transaction</u> will take place if posted through the ERA Posting. The user will need to add those transactions manually into the system for respective accounts.



Could not add rules manager or denial manager to individual or group privileges (Settings)

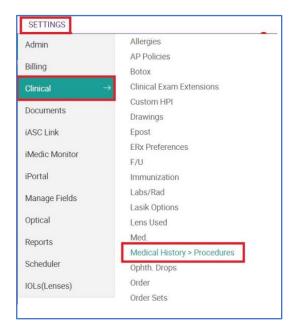
Select All				
Adjustment Codes	🔛 Cases	CL Charges	CPT	Department
Discount Codes	Dx Codes	Fee Table	🗹 ICD-10	Insurance
Insurance Groups	Messages	Modifiers	Phrases	POE
Policies	POS Codes	POS Facilities	Pre Auth Templates	Proc Codes
Reason Codes	🗹 Revenue Codes	Status	Test CPT Preference	TOS (Type of Service)
	Zip Codes	Payment Methods	Manage POS	Denial Management
dmin Privileges				
dmin Privileges Select All Business Unit	Facilities	Meard About	Us 💟 Provider Groups	Ref. Physician
udmin Privileges		 Heard About Updox 		

We have added new check boxes for both Billing and Admin areas to include denial management in billing and rule management within the Admin area.



CLINICAL

Allow all types of Procedures to display under Medical Hx / Procedures (Clinical)



The user can now define how Medical HX / Procedures will be displayed.

This new feature allows for all procedures which include injectable medications to be displayed together with other Sx procedures. There are selectable radio buttons which can help a user predefine how the information will group and display, and this can be done for specialist, i.e. Retina doctor can display all injections together.

To setup the feature first go to Settings > Clinical > Medical History > Procedures.

Once you access the setup screen there is a small window that pops up when you select "New User". The following window is where you will select the "user" and default display being ALL, Ret, GL (glaucoma) or Other. By selecting this radio button for the designated user the information would then default the selected type first and then other procedures after that.

Medical Hx > Sx/Procedure	SpLeke	
USER	DEFAULT SX/PROCEDURE VIEW Add New Record	×
	User Dev, iMW Default Sx/Procedure View All Ret GL Other	
	Save	Close

After setup, when you go to the Medical History / Sx Procedures area you will see the same radio buttons and the default selected for the defined user. This default selected would automatically display all Retina procedures first in the window table display.

Ocular Sx/Procedures		Site			
All 🔘 Ret 🌑 GL 🌑 Other	OU OD OS Date of Procedure		Date of Procedure	Physician	
vastin Injections		\bigcirc	0	06-12-2019	imw, Dev

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Expiration Date on Botox Procedure

Expiration date can be recorded for Botox Procedure.

	RGIES			Other	
	BP		Heart Attack and Stroke	outer	
New Procedure					
Proc Note Co	nsent Form Op Report				
	nsent Form Op Report				
PROCEDURES		SITE	LIDS		BOTOX TYPE
Botox			OS RUL RLL		COSMETIC
CPT CODE		DX CO		START TIME	END TIME
J0178 - Supply of	f Eylea	• H01	.11- · ALLERGIC DERMATITIS	•	
POST OP IOP	OD (DS TIME	COMPLICATIO	DN .	
Method			🔿 yes 🔘 i	00	
COMMENTS					
				A CONTRACT OF A	
TOTAL	USED	WASTED			UNITS
	USED			1 and 1	 0NITS 2.50
LOT#	USED	WASTED EXPIRATION DATE			
LOT#	USED				2.50
lot# /Isual	USED				2.50
lot# /Isual		EXPIRATION DATE		0	2.50
	sc cc 20/25 c sc cc	EXPIRATION DATE		0	2.50
LOT# /ISUAL OD	SC CC 20/25	EXPIRATION DATE OTHER		0	2.50
LOT# //SUAL OD OS 	SC CC 20/25 SC CC 20/25 CONSENT SIGNED	EXPIRATION DATE OTHER		0	2.50
LOT# /ISUAL OD OS	SC CC 20/25 SC CC 20/25 , CONSENT SIGNED N	EXPIRATION DATE OTHER			2.50

CL Worksheet disabling of Bilateral Auto-population (Clinical)

Previously, the system did an auto-population which then required the user to manually change and or add different values to fields which auto-populated. We added two new buttons at the top of the CL Worksheet page to enable someone to copy OD to OS or vice versa OS to OD. The system will no longer auto copy.

New CL Worksheet	MR - Select Wo	rkSheet -		
CL VISIT FEE	Nothing selected 👻	PRINT		DOS: 01-08-2020 + ×
EvaluationFinal	Fit Take Home CL	Current CL Other		88
Copy From : Select	Sheet 🕶 -Usage- 🔹 -Se	elect- 🔹	Copy to OS >> < Copy to OD	CL-Req

Page count field is hidden under buttons (Clinical)

It was determined that the formatting changed on the pop-up after selecting the "scanner". The number of pages covered up action buttons therefore a larger area is applied for when there are multiple sheets being scanned.



Procedure code error for H26.49 (Clinical)

The system would only display non-obscuring VA. When you select the correct code it does allow you to use it when you go to Procedure TAB. The settings were re-defined and the ability to have the same or similar code with two different meanings is setup and defined through the system.

	1.1					
lt	Pr. Note	То	Do	Super Bill	Dx Assist	Total Charges : \$0.0
		1		R-CATARACT, NOT OBS	CURING VISION [ICD-10: H2 NG VISION [ICD-10: H26.49	-
		1	HZU.U			

Contact Lens Worksheet and Order issues (Clinical)

There was an issue with the generating and printing the CL Order where names were transposed, and alignments weren't kept. The issues with the form have been fixed and the following image shows the results of a newly created CL worksheet, saving the order and then printing the order. All fields which were misaligned and or representing the wrong names have been fixed.

Patient: Smith, Dr.:iMW Dev	Althea T	-		Ĩ	inal		Smith Technician	, Althea : iMW De	r 26106 V		DOS	: 01-08-2020	Opera	ator: iM	Date: 01-08-: W Dev
ddress: Smith 405 Route 18 atient phone: order Details	S, Suite	#206 Old B	ridge, NJ 08	857							,	No. of boxes:	OD; 1		OS: 1
Evaluatio	on/Fit:	01-07- 2020													
CL Fitting	g:	01-07-2020													
CL Teach	1:	01-07- 2020													
Type DD: Air Optix DS: Air Optix	Aqua 6				Lens Co	ode	Lens Col	or	Price 60.00 60.00	Qty 1 1	Sub Total 60.00 60.00	Discount 0 0	Total 60.00 60.00	Ins. 0 0	Balance 60.00 60.00 Total : \$120.00
recoription D	otaile														
		B.Curve	Diameter	Sphere	Cylinder	Axis	ADD	DVA	NVA		Туре		_		
Prescription D	otails OD	B.Curve 8.6	Diameter 14.2	Sphere +1.50	Cylinder -2.00	Axis 035	ADD +1.00	DVA 20/20		D(J1+)	Alcon	'Ciba tix Aqua 6 PK			
	OD OS ne iMV								20/2	D(J1+) D(J1+)	Alcon Air Op MO Type Alcon	tix Aqua 6 PK			

Request PCP and Referring hover in demographics and Workview (Clinical)

PC	P	RP	СМ
K Bel	I MD▼	A Dedona	N
Ĺ	400 Lake	a????????? Dedor New Hampshire / ewood ,NJ,08701 2147483647	

The system didn't allow you to see more information when you hover over PCP or RP and now this is extended. When you hover both the PCP and Referring fields it will show the provider details as part of that information.

Update changed the ICON on main screen so you could no longer see new messages and tasks. (Clinical)

Search pa	tient	Active	- Q 🚺
User Messages	/ Forms / 1	asks	×
⊠ Messages	Forms	I Ta	sks
consult letter full e Smith, A Frank - 67	0000000	01-06-20	کر 20 03:14 PM

During the last update there was an issue where the upper righthand ICON indicating new tasks and/or messages went missing. The problem is resolved and the toggle works to bring up and open the pop-up window as designed.

New column for Visit Type in the Unfinalized Chart landing page (Clinical)

There was no identification with regard to the visit type mentioned on the screen or table. A field was added to the Unfinalized Chart landing page so this can be identified now including the visit type for the patient.

Un-finalized Chart C									
DOS	Patient Name	Visit Type	Finalize By	Facility					
01-24-20	Asfcasf, Dfsdf - 76866	Botox	01-31-2020	Toms River					
01-24-20	Smith, Joanne - 75496	Botox	01-31-2020	Toms River					

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Contact lens worksheet findings not populating the Workview chart note (Clinical)

Items from the CL Worksheet were not populating back to Workview. There were some additional fields created for the worksheet and the new fields are added to chart note to match those from the CL worksheet. These new fields are also added to the variables so they can be printed out on letters and forms.

CL Worksheet Screen

Contact Len	S		A Frank Sm	ith - 67056	
New CL Worksheet MR	- Select WorkSheet -				
Cylinder	-8.25		-8.25		
Axis	040	>>	040		
Color	Blue	<<	Blue		
Add	+1.25		+1.25		
DVA	20/20		20/20		
DVA OU	20/20				
NVA	20/20(J1+)		20/20(J1+)		
NVA OU	20/20(J1+)				
Over Refraction (NVA)	Comfortable		Comfortable		
	Comfortable		Connortable		
Movement	Tight	>>	Tight		
		>> <<			
Rotation	Tight		Tight		
Rotation Condition	Tight		Tight good		
Rotation Condition	Tight good Clean	**	Tight good Clean		
Rotation Condition	Tight good Clean Centered Other	r [Tight good Clean Centered Other		
Movement Rotation Condition Position Charges \$	Tight good Clean Centered Other Replenishment Wear Scheduler	r [Tight good Clean Centered Other Disinfecting		

Workview chart note screen with same fields from CL Worksheet

	Comfort	Movement	Rotation	Condition		Position		Other	Position B/Blink	Other	l	Position A/Blink	Other	Fluorescein Patter	Inverted	Lids
OD	Comfortable	- Tight	- good	Clean	•	Centered	•			•			-		•	
0S	Comfortable	- Tight	- good	Clean	•	Centered	•			•			-		•	-
Repl	enishment				W	ear Scheduler					D	Disinfecting				
2 W	eeks			-	Bi	-weekly					• (ClearCare				-
																11
																//

CL Worksheet auto-populating "Make" (Clinical)

The system would automatically copy the **Make** from the eye that was entered first, to the second eye. Now the "Make" field and all others are under new logic where



Copy From Select Shee	et 🔹 -Usage- 🔹 -Select-	Copy to OS >>	<< Copy to OD	🗖 CL-Req
0	OD	+ os	+	
Lens Type	SCL	• SCL		
Make	Alcon/Ciba-Air Optix Aqua	i 6 PK-MO		

whatever is entered into a single field you now have two buttons to move that info from one eye to the other. "Copy to OS" OR Copy to OD".

"-VE" detail in ROS and Consult Letters (Clinical)

The entire ROS area was revamped to be more specific to CMS guidelines whereby 14 categories now show and include specific symptoms per category. Also, the abbreviation which was currently used "-ve" is now changed to say "negative".

Review of Systems 14/14

- Hemotologic/Lymphatic
- Musculoskeletal
- Neurological
- All recorded systems are negative except as noted above.

The system will show some numbers in the small box at the header Review of Systems. Depending upon what is displayed it indicates the number of total systems that you have documented for this visit. The left shows 14/14 meaning that all systems were evaluated.

You will see that certain systems are displayed in black font and these are the sections which were documented with positive results. These are displayed allowing

tient Medical History	REVIEW OF SYSTEMS	NO KNOWN	MEDICAL CONDITION	
edical Review - Reviewed	ALLERGIC/IMMUNOLOGIC	NEGATIVE	CARDIOVASCULAR	NEGATIVE
13-2020 at 08:15 PM iD sular asses re Problems ny Conditions	Hay Fever Sea Others	sonal Allergies	Chest Pain Congestive Heart Failure Irregular Heart beat Low Blood Pressure Shortness of Breath Others	High Blood Pressure Pacemaker/defibrillator
ood Sugar	CONSTITUTIONAL	NEGATIVE	EAR, NOSE, MOUTH & THROAT	NEGATIVE
nolesterol neral Health Back Pain-Scoliosis	Fatigue Fever Ras	h 🗌 Weight Loss	Deafness Dry Mouth Post Nasal Dri Sinus Infection Others	ps 📄 Runny Nose
view of System: 14713 Hemotologic/Lymphatic Musculosketetal Neurological All recorded systems are negative except as noted above. cial Smoke: Never smoked Cessation Counseling:	ENDOCRINE Hyperthyroidism Hypothyroidism Poly Others	VEGATIVE	EYES Double vision Eye pain Vision loss Others	NEGATIVE
ular Medication No Known Medication	GASTROINTESTINAL	NEGATIVE	GENITOURINARY	NEGATIVE
ergies Reviewed	Bloody Stools Constipation Diar	rhea Hepatitis	Blood in Urine Discharge Genital Ulcers Others	Kidney Stones

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the user to go to those sections to see what was recorded. If other systems were marked as "negative" then these are represented by the single statement "All recorded systems are negative except as noted above".

An additional indication of what has been done or NOT done is also indicated when you hover over the numbers. In the case below the number is 13/14. You can see both what is indicated from the hover as well as how the ROS section is colored when

General Health	Ω	Mr. Smith, A Frank - 67056 Brick		
Patient Medical History	ft. Inch	Please Select -	Kg/sgr.m Please Sele	rct -
Medical Reviewe Reviewed 02-18-2020 at 10:26 AM iD	ALLERGIC/IMMUNOLOGIC	NEGATIVE	CARDIOVASCULAR	NEGATIVE
Ocular Glasses Eye Problems Any Conditions • Dry Eyes	Hay Fever Seasonal A Others	lergies	Chest Pain Congestive Heart Failure Irregular Heart beat Shortness of Breath Others	High Blood Pressure Pacemaker/defibrillator
Glaucoma Cataract suspect IM	CONSTITUTIONAL	NEGATIVE	EAR, NOSE, MOUTH & THROAT	NEGATIVE
Blood Sugar Cholesterol General Health • Fund Blood Brossine • Early Nose, Mouth & Throat	Fatigue Fever Rash Others	Weight Loss	Deafness Dry Mouth Post Nasa	I Drips Runny Nose
Review of Systems (1374) Allergic/immunologic Cardiovascular Eyes All recorded systems are negative accept as noted above.	ENDOCRINE Hyperthyroidism Hypothyroidism Polydipsia Others	NEGATIVE Mood Swings	EYES Double vision Eye pain Vision loss Others	NEGATIVE
Social Smoke: Never smoked Cessation Counseling: 	GASTROINTESTINAL	NEGATIVE	GENITOURINARY	NEGATIVE
Ocular Medication	Rloody Stoole Constination Diarrhea	Henatitie	Rlood in Urine Discharge Genital Ulr	pere Kidnev Stones
모 🕲 🕐 \$\$ 🖶		Save & Reviewe	4	03-03-2020 10:38:37 AM R8

the section is left empty or not checked off.



ROS – distinguish when incomplete (Clinical)

The new ROS section looks like the following and is divided into 14 sections.

EVIEW OF SYSTEMS	NO KNOWN N	MEDICAL CONDITION	
ALLERGIC/IMMUNOLOGIC	NEGATIVE	CARDIOVASCULAR	NEGATIVE
Hay Fever Seasonal Aller Others	gies	Chest Pain Congestive Heart Failure Irregular Heart beat Low Blood Pressure Shortness of Breath Others	High Blood Pressure Pacemaker/defibrillator
CONSTITUTIONAL	NEGATIVE	EAR, NOSE, MOUTH & THROAT	NEGATIVE
Fatigue Fever Rash	Uveight Loss	Deafness Dry Mouth Post Nasal Drip Sinus Infection Others	os 🗌 Runny Nose
ENDOCRINE	NEGATIVE	EYES	NEGATIVE
Hyperthyroidism Hypothyroidism Polydipsia Others	Mood Swings	Double vision Eye pain Vision loss Others	
GASTROINTESTINAL	NEGATIVE	GENITOURINARY	NEGATIVE
Bloody Stools Constipation Diarrhea Jaundice Ulcers Voniting Others	Hepatitis	Blood in Utine Discharge Genital Ulcers Others	Kidney Stones
HEMOTOLOGIC/LYMPHATIC	NEGATIVE	INTEGUMENTARY	NEGATIVE
Anemia Blood Transfusions Excess Infection Purpura Others	sive Bleeding	Breast Lumps Dermatitis Eczema Wounds Others	Rashes
MUSCULOSKELETAL	NEGATIVE	NEUROLOGICAL	NEGATIVE
Joint Ache Pain	Paralysis Fever	Headache Migraines	Faints Multiple Sclerosis Seizures
PSYCHIATRY	NEGATIVE	RESPIRATORY	NEGATIVE
Anxiety Depression Memory Loss Mental and/or emotional factors Others	Paranoia Sleep Patterns	Asthma Bronchitis COPD Emphysema Shortness of Breath Others	Cough

Neuro/Psych Section (Clinical)

The ROS area was reworked as all categories are included. We also expanded the lists for each section.

EUROLOGICAL		NEGATIVE	PSYCHIATRY		NEGATIVE
Alzeihmer's Disease Headache Numbness	Dimentia Migraines Parkinson's Disease	Faints Multiple Sclerosis Seizures	Anxiety Memory Loss Others	Depression Mental and/or emotional factors	Paranoia
Stroke	Others				



Tasking failed outbound faxes (Clinical)

A new Rules Manager option allows you to designate whether to include the status of outbound faxes and to report those in a task message or printed report based on who is creating the original consult letter.

Rule Manager	Mr. Smith, A Fra	ank-67055
Accounting Appointment Apprintment	Denial & Rejection Reason code Encounter Deleted Transaction Deleted Payment Deleted or Edited Pt Status changed Pt Account Status Incoming Fax V Outgoing Fax	Apply This rule after the message arrives Assigned To Physicians • Dev, MW • Comment

NEED UPDOX TO CREATE WORKFLOW

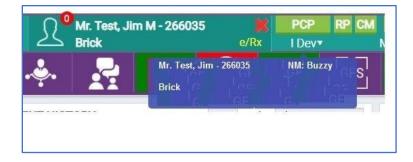
Provider(s) signature on auto-finalized charts (Clinical)

When a chart is auto-finalized the provider's signature will also display in the Workview so long as the provider's account has a signature in Settings > Admin > User.

Signature	Kan	Sign. Name	Dev, iMW (Physician)	×+

Nickname does not appear anywhere but on Patient Info demographics form (Clinical)

The system can now show a hover-over pop-up of the patient panel so the user can see additional content including the patient nick name.



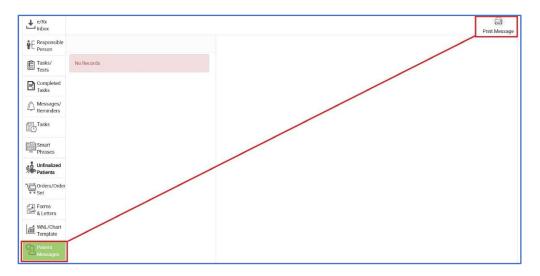
Add drop down field for "method" under IOP (Clinical)

IOP	Gonioscopy	Drav	ving		
Squeezing	Unreliable	Unable	Hold Lids	Trgt OD	Text
T ₁	Method				
	Applanation	-			_
OD	Pnuematic	1	C		
Descriptie	Puff				
OD:16,05	Tactile Tonopen	М			1

The system has a new drop-down which you can select from and or still manually enter the method. This is programmed and not selectable by the user.

Need to printout patient communications that come into IMW (Clinical)

The system now has a new ICON for printing patient messages. Go to User Console > Patient Messages - Print ICON displays and allows for message to be printed out.



Contact Lens Worksheet Date (Clinical)

A change in the system now shows the date that the Rx was given in PFS – Patient Refractive Sheet. The system would ultimately have two dates – the date of service for the visit and the date the Rx was given.

	1-08-20			Lake	/Щ						actually ge									the date the	
tient Refr ASSES (REFRAG	CTIVE R	K)			Add					SCL - CO	1	T LEN BC			•		100	514	1	d External VA
Date	Site	S	C	A	DVA		NVA	Prism	Туре		Date	Site	BC	DI	S	C	A	ADD	DVA	NVA	Туре
0-24-14	OD OS	plano -0.25	+0.50	090°	20/20-1 20/25+2	+2.75	20/J1+ 20/J1+			٠		OD	8.6	14.2	+1.50	-2.00	035*	+1.00	20/20	20/20(J1+)	Alcon/Ciba - Air Optix Aqua 6 PK -
	OD	-0.25 pl	sph +0.50	090°	20/25+2	+2.75	20/J1+ 20/J binoc				01-10- 20										MO
9-05-14	OS	+3.00	sph	090	20/25	+2.75	20/J binoc			۰	Final	OS	8.6	14.2	+2.00	.4.25	025*	+1.00	20/20	20/20(J1+)	Alcon/Ciba - Air Optix Aqua 6 PK -
9-05-14		pl	+0.50	090°	20/20	+2.75	20/J binoc						0.0	14.2	.200	4.20	000		20/20	20,20(011)	MO

Signed Chart Dates (Clinical)

The system will track all events where the chart has been unfinalized and refinalized. The user can see this below the Signature on Chart.



Visit - Type		eRX [i) 🔅 🤞	. 🛃 (!! (
STANDARDS OF CARE SOC Comments			Medical Hx. revi	ewed by: 01-29-2020 10:58 AM
FUTURE APPOINTMENTS (INTERNAL)			Fut	ture Appointments (External) 🕕
No Future Appointments				
RECALLS				ASC - Surgical Ocular Hx
07-27-2015 DR P/YR (03 M) Debbie T,				
TRANSITION OF CARE		SCRIBED BY		
REASON FOR TRANSITION OF CARE	\$	COMMENTS		\$
REFER TO		REFER TO C	DDE	
REASON FOR REFERRALS	0	COMMENTS		\$
PT DISCUSSION / COMMENTS		0	ARE GIVER COLORS: iMW Dev	Phys.
Signature Signed on 01-29-2020 11:02:29 Re-Finalized on 01-29-2020 11:10:33 Re-Finalized on 01-29-2020 11:21:33	2	Sign. Name	Dev, iMW (Phys	ician) 🕂

Direct Messages (Clinical)

The system now clearly displays information regarding the status (IN or OUT) and whether it is processed or dispatched.

Direc	t Messages [Sent]			New Direct		L⊥⊥ Dox Sent
	то	SUBJECT	DATE	MID	Status	
Showing	1 to 2 of 2 record(s)					
	DevStaging_imw@devstaging.imwdirect.com	Τ1	10-14-2019 05:54 PM	694050957	processed	
	DevStaging_imw@devstaging.imwdirect.com	Τ1	10-14-2019 05:54 PM	694050957	dispatched	

Direc	ct Messages	(Sent)		New Direct	Receive Direct	⊥ Inbox	 Sent
	то	SUBJECT	DATE	MID			
No recor	ds found.				Dispatche	ed	



DOCS screen closes on going from Accounting to Front desk (Clinical)

You can now toggle between the DOCS screen and the Accounting screen. The patient specific DOCS screen stays open.

F	Payments l	Ledger						AA	Mr. Sm Brick	ith, A Frank	- 67056	ERA Clair	ns Statemer	nts A&P	Notes
	All Unpaid Charges Charges			Group: Select Group			DOS From:		DOS To: All	DOS To:		Cash Ch #		CC #	
	S.No. DOS E. Id		Ins.	СРТ	CoPay	Charges		Payment Details					Pt	Ins.	
¢	iMedicWare	e - Google Ch	rome	-											
	eclimed	dicware.com	/imwdev_sprint/int	erface/commo	n/docum	ents.php									
5	Signed Search Docs.					Smith, A Frank - 67056 (DOB - 03-15-1950					-1950, Age - 69	Yr.)			
	P3 -			1											

IMW AR measurements (Clinical)

When a User adds values to the AR section via the marco file, then if the formatting of values is insufficient, IMW will add or convert it accordingly. For example, if the value is received as "0.5", IMW will convert it to "+0.50" or if value such as "33" comes, it will become "+33.00". There would be <u>NO</u> rounding off of values.

Procedure Code and A&P section (Clinical)

The dx code is now saved in assessment and plans section or Settings-> Clinical->AP policy or physician console->Smart A&P. The system will also save the Dx code and Dx code ID in the database record.

🚊 Dev, IMW 🧕	w W	ORKVIEW TESTS MEDICAL H	X PATIENT INFO	DOCS ACCOUNT	TING BILLING OPTICAL REPORTS	S SETTINGS			Search patient	Activ	e 👻
licies Throu	gh Settings > Clinical > 2	A&P Policies									
FINDINGS		ASSESSMENT			PLAN	ORDER SET	ORDERS	ICD-9	ICD-10		CPT CODE
Conjunctiv	a/Foreign Body	ATOPIC CONJUNTIV	ITS, ACUTE		Appropriate medication			372.05	H10.1-		
Vitreous/H	emorrhage	VITREOUS ABSCESS			Need to manage properly			360.04	H44.02-, H43.1-		
		hrough Physician Console > S R.D Dev. iMW	Smart A&P							New Sh	
SMART A&P	SMART A8	&P - Dev, iMW		Order Set	Ordere	CHT Code	100.0		CD 10	New SM	
SMART A&P	SMART A8	Assessment	Plan	Order Set	Orders	CPT Code	ICD-9		CD-10	Actio	
ASP ASP e/Rx Inbox	SMART A8	Assessment iMW Testing	Plan ABC	Order Set	Orders	CPT Code	ICD-9	ŀ	H40.11X-	Action	
KEP SMART A&P e/Rx Inbox	SMART A8	Assessment	Plan	Order Set	Orders	CPT Code	ICD-9	ŀ		Actio	
e/Rx Inbox	SMART A8	Assessment iMW Testing	Plan ABC	Order Set	Orders	CPT Code	ICD-9	ŀ	H40.11X-	Action	
ASP ASP	SMART A8	Assessment iMW Testing	Plan ABC	Order Set	Orders	CPT Code	ICD-9	ŀ	H40.11X-	Action	

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This dx code id is transferred to superbill records so that correct dx code description is displayed.

AP Policies						
FINDINGS	ASSESSMENT	PLAN	ORDER SET	ORDERS	ICD-9	ICD-10
Conjunctiva/Foreign Body	ATOPIC CONJUNTIVITS, ACUTE	Appropriate medication			372.05	H10.1-
Vitreous/Hemorrhage	VITREOUS ABSCESS	Need to manage properly			360.04	H44.02-, H43.1-
Visit - Type Fundus WNL C:D OD OS Optic Nerve	· · · · · · · · · · · · · · · · · · ·	<u>₹</u> ("" @ ∠ [S PRS PFS	RFS 🛃		
Vitreous Present Retinal Exam Peri NE Draw RT Draw ON	Hernorrhage	Present Hemorrhage				
TESTS HISTORY Gonio (01-	23-20) MR (01-29-20)	No Dilation (01-24-20)	Jar	nuary2020(01-24-20))	
ASSESSMENT HX	Visual Function - 14 NE	DX PLA	N	/ m	ev. Plans	
1 NE RES Blepharitis ; Both Eyes		H01.00-				
2 NE RES Dry Eye ; Both Eyes		H04.12-		1		
3 NE RES Nuclear Sclerosis ; Both Eyes		H25.1-		/		
4 NE RES Post Vitreous Detachment ; Bo	th Eyes	H43.81-				
5 NE RES VITREOUS ABSCESS; Both Eyes	5	H44.023,	leed to manage properly			
		H43.13 ¥				
6 NE RES CME FOLLOWING CATARACT S	SURGERY; Both Eyes	H59.033 🗘				

2020 ICD-10 codes (Clinical)

The system was updated with the 2020 ICD10 codes and this was done via a hot fix to all client sites back in December 2019.

Template based custom test appearing on Test History (Clinical)

Test Templates created under Settings > Clinical > Test Templates and performed for the patient would appear as part of the Test History. This has been done so that the Provider is able to see all the Tests done for the patient within the work view itself.



	WORKVIEW TESTS MEDI	AL HX PATIENT INFO DOCS ACCOUNTING			PATIENT TESTS & L	ABS
prehensive No Defect	Active	DOS	Mrs. Smith, Althea T - 26106	PCP RP CM PATIENTS FO	CUSTOM TEST TEMPLAT 01-15-2020	E
it - Type	🗊 😔 🛷		👎 🛞 🖌 GFS PRS	PFS RFS 51 20	FUNDUS	
Vitreous	Present PVD		Present PVD		11-30-2018	2
Retinal Exam Peri NE	2+ Drusen: Absent CNVM		small heme in inferior mecuna AMD; Haro	(2) Damage 2) DDE Changese Drasset	09-29-2017	P
	2+ Drusen, Absent CNVM		CNVM	1 2+ Drusen, 2+ KPC Changes, Present	09-09-2016	P 🖻
Draw RT Draw ON Draw MA					08-21-2015	P 🖻
	MR (10-24-14)	No Diletion (01-14-20)	OCT - R (12-03-18)	Fundus - MP (11-30-18)	09-05-2014	P 🕨
ESTS HISTORY	Custom test template (01-15-2				05-17-2013	2
					IOL MASTER	
					09-11-2014	
					ост	
					12-03-2018	P

Ophthalmoscopy coding changes (Clinical)

To handle the 2020 Ophthalmoscopy coding changes the following changes have been made to accommodate the new code changes and to assure you have the appropriate documentation for any activity documented.

a. Drawings for Optic Nerve, Macula and Retina (vessels and periphery), have been separated under Workview > Chart note > Fundus.
 RT for Retina (Vessels and Periphery) (full field)
 ON for Optic Nerve (30 degree field)
 MA for Macula (30 degree field)

Dev, IMW	o 🛱	WORKVI	EW TEST	S MEDICA	AL HX PAT	TIENT INFO	DOCS	ACCOUNTI				RTS SETTI	NGS						Search par	ient	Active	
omprehensive	No Defect	 Active 					DO 01-10-3		<u>∫</u> ⁰ Smit	h, Aaron - 6	59464		* 🖻	CP RP CIV	PATIEN	TS FORMS rmal	NCF					Ę
isit - Type	-	R	•=	eRX		50	. .	-	(<u>"</u>	\odot	L	GFS	PRS	PFS	RFS	F.		ē	æĨ	Q	<u>-</u>	
пъ остори		VTINL.		1						SALAF							_	_	1			
Lens		Clear								Clear												
Drawing																						
Fundus	WNL UNDO																					
C:D OD .4	OS .3	.4 C:D								.3 C:D												
Optic Nerve																						
Vitreous																						
Retinal Exam	Peri NE																					
Draw RT Draw	v ON Draw MA																					

 User can add CPT 92201 and 92202 to Test CPT Preference under Settings > Billing > Test CPT Preference.



Test CPT Preference				lest, Jim M -:	266035 erikx	🛷 🚽 🖨 🖉
ост						
		٠			92133	× +
OCT-Anterior Segment						
	2	۰			92132	× +
OCT-Retina						
	8	٠			92134	× +
Ophthalmoscopy Optic Nerve & Macula						
			۰		99202_OD	×
				۲	99202_OS	×
		٠			99202	×
Ophthalmoscopy Retina drawing and a	cleral depression					
	2		۲		92201_OD	×
				۲	99201_05	×
		۰			99201	×
Pachy						
		۰			76514	×
						T

Note: These codes will <u>need to be added by the User themselves manually</u> in the system under Settings > Billing > CPT. The old codes 92225/92226 and 92201/92202 cannot be added on the same Superbill. The new codes 92201/92202 are Bilateral codes and cannot be used together on the same Superbill.

- c. Pre-condition for these codes to drop on the Superbill are that there should be a dilation done and the drawings are saved in Fundus. Old logic of 92225/92226 will not apply.
- d. An Assessment and Interpretation form is provided for each drawing.

Report and	Interpretation			×
Ordered By Assessment	iMW Dev	Test Type	Optic Nerve Drawing	
GLAUCOMA	WITH INCREASED EPISCLERAL	VENOUS PRESS	SURE; Right Eye	
Dx Code				
H40.811				\$
Plan				
Need to give	blood pressure Control blood s	ugar, blood pres	sure, lipids	
	Done	Delete		



e. When an A&P along with a Dx code is filled out saved & the chart is signed, a report would appear in Docs folder under interpretations. This is how it will be seen and saved for further reference apart from the Workview.

Pt. Docs	Search Docs.	Smith, Aaron - 69464 (DOB - 03-15-1950, Age - 69 Yr.)
 Favorite Signed 	^	Printed by:Dev, iMW on 01-15-2020 15:57:13
Signed Signed Package Consult Letter CCDA	(69) 1	Smith - 69464 - 950-03-15 Fax: idge, NJ 08857
CLUA Fax Outbox Fax Intox Fax Intox Seved Docs Collection Letters Petient Orders	Ph.: Interp Order	retation By IMW Dev ssment GLAUCOMA WITH INCREASED EPISCLERAL VENOUS PRESSURE; Right Eye
Insurance Cards Interpretations 2020-01-15 15:56:32 Scan Docs	00	os
Operative Notes Pt. Instruction Docs Multi Upload Template Consent Templates		() () () () () () () () () () () () () (
Package Templates Surgery Consent Templates	~	

f. To document which ophthalmoscopy lens was used, a "Lens Used" section with a drop down to select the lens, has been added to the Fundus exam.

Optic Nerve	Vitreous	Retinal Exam	Draw RT	≻ Draw ON	Draw MA	
	Periph	ery not examined		Lens Used:		

To add the Lens options, one can manage them from Settings> Clinical > Lens Used.

	Search patient	Active	- Q 🚺
Smith, Aaron - 69464 X			🗧 🖶 🗟
	NORKVIEW TESTS MEDICAL HX PATIENTINGO DOCS ACCOUNTING BILLING OPTICAL REPORTS SETTINGS	ocardi parena.	otorial participation and participation of the part



Medical History Review (Clinical)

It has been noted that any provider who is reviewing Medical History does not know who reviewed it last and what items were changed in the previous review. Hence when the provider hovers over the General Health button under Workview > Chart Note, a list of providers who have reviewed Medical History will be seen.

To view a Medical History of what all has been modified, select the provider name for further information.

WODK/JEW TECTO	MEDICAL HX PA	TIENT INFO	DOCS ACCOUN	TING BILLI		DEDODTE	CETTINCC	
WORKVIEW TESTS	MEDICAL HA	TIENT INFO	DUCS ACCOUR	IIING DILLI	NG OPTICAL	REPORTS	SETTINGS	
Active			DOS 01-16-2020	Mr. Bric	Smith, A Frank k	- 67056		PCP M Sabo
	eR 🔝	\$ \$	÷. 5	("	\bigcirc		GFS PRS	PFS
AAOx3 👻	iMW D	Medical H	x. reviewed by:		ORY	Domii	nant 👻 Colo	-
r. old male patient		1. iMW	/ Dev 01-16-20	20 05:46 PM	s a history o in left eye 0			
				IMW Testin	•			
WORKVIEW TESTS MEDICAL HX PA	TIENT INFO DOCS ACCOU	NTING BILLING O	https://eclimedicv	vare.com/imwdev_	.sprint/interface/Med	ical_history/reviev	v_details.php?masterld	= 335421, 335422, 3
tive	DOS	() ⁰ Mr. Smith,	Medical Hx Reviewed D	etail For Section <u>Corr</u>	<u>iplete</u>		Reviewed By Dev, IMW on	01-16-2020 05:46 F
	01-16-2020	Brick	S.No. Operator	Date Time	Field name	Original Value	Modified Value	Section Name
😰 😔 🛷 🗈	Medical Hx. reviewed by:		1 Dev, IMW	01-06-2020 04:24 PM	You Condition Value			Ocular Hx
Dx3 • iMW D	1. iMW Dev 01-16-2	020 05:46 PM in k	2 Dev, IMW	01-06-2020 04:24 PM	Any Other Condition You Have Presently Or Have Had In The Past		1	Ocular Hx
		PCT	3 Dev, IMW	01-06-2020 04:24 PM	Any Condition You Have Presently Or Have Had In The Past		You Dry Eyes :√	Ocular Hx
Snellen → Ø NEAR 0/25 → 20/ → 0D CC	Snellen 👻 🏒		4 Dev, IMW	01-06-2020 04:25 PM	You Condition Value		You Dry Eyes : only in left eye	Ocular Hx
	20/25 - SC 20/	 OD 20/ 						
		OD 20/ OS 20/ OU 20/	5 Dev, IMW	01-06-2020 04:25 PM	You Condition Value	You Dry Eyes : only in left eye	You Dry Eyes : only in left eye	Ocular Hx
0/ - 20/ - 0U 25 OS: CC, 20/25-1 NCE NEAR copy 0R/Priam & O	20/25 → SC 20/ 20/ → 20/	OS 20/ OU 20/ PC 2 DISTANCE NEA	5 Dev, IMW 6 Dev, IMW		You Condition Value Any Other Condition You Have Presently Or Have Had In The Past	Eyes : only in left		Ocular Hx Ocular Hx
20/ • 20/ • OU 25 0S: CC, 20/25-1	20/25 • SC 20/ 20/ • 20/ Add+3.00	OS 20/ OU 20/		04:25 PM 01-06-2020	Any Other Condition You Have Presently Or Have Had In The	Eyes : only in left eye		

Documentation of IOP (Clinical)

The IOP method has been added to note. The method will also be printed on the patient chart.

IOP	Gonioscopy	Drawing									
Finalized	Squeezing Ur	nreliable Unable Hold Lids Trgt C	D Text OS Text	Pach	hy OD Text	OS Text	Pachy Dt:				
Т.	Pnuematic × Applanation		T ₂ Method	Ta	Method			T4 N	lethod		0
OD 7 Description	Pnuematic	7 S:59PM	OD OS	0	D	OS	O	OD	OS	0	
Description	Puff Tactile		Description	De	escription			Description			
	Tonopen										

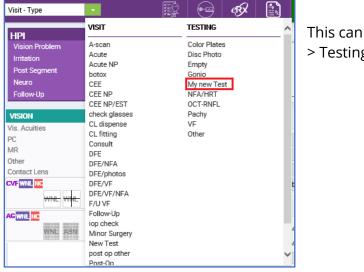


This is also available on the Patient at a Glance screen.

Mr. Sm	ith, A Frar	nk - 67056		Ma	ile (69	Yr.) 03	-15-1950	Date of Service: 01-16-202
IOP/G	ONIO							
	OD				os		-	Time
IOP	Pnuema	atic: 7 5:59PM			Pnuema	atic: 7	:59PM	Pnuematic: 5:59PM
							:	
Date		Vision	м юр	OD OS	C:D	C/L	Assessment	
01-16-2020			Pnuemati	ic:7, 7 5:59PM			- Blepharitis ; Both Eyes (H01.00-) (OU)	
Toms River Dev, iMW							- Dry Eye ; Both Eyes (H04.12-) (OU)	
Billed							- Nuclear Sclerosis ; Both Eyes (H25.1-) (OU)	
• • •	•						Post Vitreous Detachment ; Both Eyes (H43.81-) (OU	D
								,
01-09-2020 Toms River							- Blepharitis ; Both Eyes (H01.00-) (OU)	
Dev, iMW							- Dry Eye ; Both Eyes (H04.12-) (OU)	
Billed							- Nuclear Scierosis ; Both Eyes (H25.1-) (OU)	
• • •	•						- Post Vitreous Detachment ; Both Eyes (H43.81-) (OU	0
01-06-2020							 Blepharitis ; Both Eyes (H01.00-) (OU) 	
Toms River								

Customize Testing list for Visit Type drop down (Clinical)

The Testing list can be customized to include/exclude Tests under the Visit-Type section of Chart Notes.



This can be done by going to Settings > Clinical > Testing.



Testir	g									
	TESTING									
	Color Plates									
	Disc Photo									
	Empty									
	Gonio									
	My new Test									
	NFA/HRT									
	OCT-RNFL									
	Pachy									
	VF									

Finalized and Un-finalized chart filter on Day- Charges screen (Clinical)

Day Charges S	earch																
Provider Type		Provider	Operator	Facility	Ins. Case Type	Primary Insurance		DOS From		DOS To		Sort By		View		Chart	
Select Type	•	Select Provider	✓ All Operator	▼ Select Fac	cility 🔹 Select Case	 All Insurance 	-	01-18-2020	i	01-18-2020	Ħ	Appointment	-	All	-	All	•
																All	
																Final	ized
																Un-fi	nalized
																Re-fi	nalized

- a. **Finalized charts** -> Charts which have been either manually finalized by the Provider or have been finalized due to the process of Auto-finalization.
- b. **Un-finalized charts** -> Charts which have not been finalized as part of the Auto finalize process or manually finalized by the provider.
- c. **Re-finalized** -> Charts which have been finalized then un-finalized and there has been a change/modification made to the Superbill. The important thing is whether there was a modification made or not to the chart.

d. **All** -> Display all the above options together, the ones which have been re-Finalized are marked with an "i" symbol. If the user hovers above the star they should be able to see the message "the chart was un-finalized and a modification done to Superbill".

1.) If the chart was unfinalized, Superbill Modified and the Chart is finalized manually/Auto-

finalized, then display message = "Chart was unfinalized, a modification to the Superbill made and Chart is re-finalized"

2.) If the chart is un-finalized, Superbill modified and still open, *then displays the message* = "

Chart was unfinalized, modification to Superbill was made and Chart is not finalized".



SCHEDULER

Scheduler Audit Log

Go to Settings > Scheduler > Provider Schedule and on the screen there is a new link added which is labelled "View Log" if selected this will open and show the activity of the templates for this particular provider.

		Provi	der Si	chedule		Custom	Label log				
ROVIDER	ev, iMW	Log	-			*	•	Jan 2020		•	
Monday		Tuesday		Wednes	day	Thursday		Friday		Sat/Sun	
					1		2		3	BRICK	4
			-								5
BRICK	6		7		8		9		10		11
											12
TOMS RIVER	13	TOMS RIVER	14		15	TOMS RIVER	16	TOMS RIVER	17		18
romo ni ren		TOMS RIVER				TOMS RIVER		BRICK			19
	20		21		22		23		24		25
								TOMS RIVER			26
	27		28		29		30		31		5 th
											5*
	5 th		5 th								

The log would look like below:

SR.	WEEK DAY	CAL. DATE	FACILITY	TEMPLATE	SUMMARY	FOR FUTURE	USER	IP	TIMESTAMP
1	week3 day4	01-16-2020	Toms River	Toms River (Morning)	Schedule added by replacing template (a)	yes	Dev, iMW	10.1.25.200	01-30-2020 03:03 PM
2	week4 day5	01-24-2020	Toms River	DR G TUESDAY	Schedule added from frontdesk	no	Dev, iMW	10.1.25.200	01-24-2020 03:53 PM
3	week3 day5	01-17-2020	Toms River	Brick (Afternoon)	Schedule added from frontdesk	no	Dev, iMW	10.1.25.200	01-17-2020 02:58 PM
4	week3 day4	01-16-2020	Toms River	Dr W Thursday	Schedule added from frontdesk	no	Dev, iMW	10.1.25.200	01-16-2020 06:21 PM
5	week2 day2	01-14-2020	Toms River	Chain events testing	Schedule added by replacing template (a)	yes	Dev, iMW	10.1.25.200	01-14-2020 11:33 AM
5	week1 day1	01-06-2020	Brick		Schedule added by replacing template (a)	no	Dev, iMW	10.1.25.200	01-06-2020 07:48 PM
							Showing 6/6		

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Deceased Patients (Scheduler)

Previously, the System didn't appropriately mark the patient status if "Deceased", and it still allowed the patient to be scheduled for an appointment. The system now appropriately marks Deceased Patients to NOT appear and or to allow them to have future appointments when the status is set.

Once the Patient is marked Deceased if they have any future appointments, those will be marked as Cancelled.

2) ^D Mrs. Smith, Joanne - 7549 > Whiting	6 🗶	Add New
Pt. Status	Deceased -	1	Pt AS
MORE INFORMATION			
UPLOAD	Created By Test, Annamarie Driving License	Registration Date 05-18-2018	
Eligibility Last Check Deta No IMEDICWARE	1		
30	nged to deceased. nents will be canceled.		
✓ Re	OK		

Any future appointment which was scheduled will be cancelled.



	n De	ev, iN	νW				-	Fac	ility	Tom	s Rive	er											Smith, Joanne -75496
	1	7	31		~	<	M	arch 2	2020				÷	>		≥		(То	day		3 Mon	6 Mon
		MA	RCH	2020					AP	RIL 2	020					М	AY 2	020				R _M	Dev, IMW (0/0)
SUN I	MON 2	TUE S	WED	THU 5	FRI 6	SAT 7	SUN 29 Mar	MON 30 Mar	TUE SI Mar	WED	тни 2	FRI S	SAT 4	SUN 26 Acr	MON 27	TUE 28 Apr	WED 29 Apr	THU SO Apr	FRI 1	SAT 2		20	chalaz
8	9	10	п	12	13	14	5	6	7	8	9	10		3	4	5	6	7	8	9		30	
15 22	16	17	18	19	20		12 19	15	14	15	16	17	18		11	12	15	14	15	16 23		40	
22	23 30	24 31	25 1 Apr	26 2 Apr	27 3 Apr	228 4 Apr	2.6	20 27	21 28	22. 29	23 30	24 1 May		2.4	18 25	19 26	20 27	21 28	22. 29	30		50	
ΡΑΤ	IENT	Г				1	Active			-	٩	6)음	еR	RTE	/V					\otimes	11 AM	
Cance	el	Ch	eck Ir	۱ [Chec	k Out	: R	le Sch	edule	•	Save		Add A	ppt	Ар	pt Hx	-				:		
																						10	
NSUF	RAN	CE F	PLAN	4			Sa	ave In	surar	ice	AA	No	rmal-2	9991			NS HX				^	10 20	
				l olicy:	#		Sa		surar	ice CoP		No	rmal-2 Typ			Re	ΗХ	Auth.	Amt		^		
	Carrie	er	P				_		surar	_		Nor		e			ΗХ	Auth.	Amt.		^	20	
Ins. C	Carrie	er RE	P	olicya	6789		Grou			_		No	Тур	e			ΗХ	Auth.	Amt.		^	20 30	
Ins. (MED AETI	Carrie DICAF NA 3	er RE	P.	olicyd 2345	6789		Grou	p#		_		No	Typ Pri	e			ΗХ	Auth.	Amt.		^	20 30 40 50	
Ins. (MED AETI	Carrie DICAF NA 3	er RE	Pi 1 1	olicyd 2345	6789 6789		Grou	p# 78514	00	_	ay	No	Typ Pri Se	e			ΗХ	Auth.	Amt			20 30 40 50 12 PM	
	Carrie DICAF NA 3 DINTI	er RE	PA 1 1 1 NTS Er	olicy/ 2345 2345	6789 6789		Group 6227	p# 78514	00 Date	CoP	ay		Typ Pri Se	c			ΗХ	Auth.	Amt			20 30 40 50	

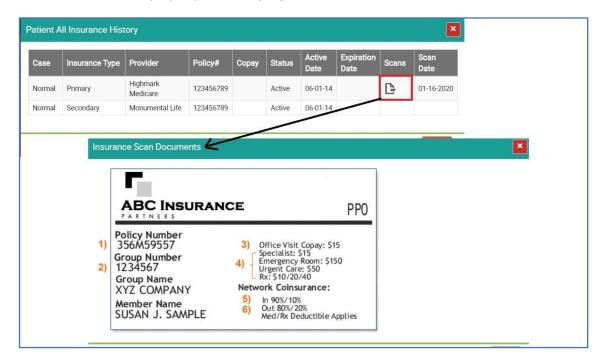
No new appointment can be scheduled as the "Add Appt" button is greyed out.

PATIENT Cancel Check In	Active Check Out Re Sc	+ 🔍 💿 🖶 🕅	With Pt Status as Deceased, No new appointment can be	\otimes
Mrs. Joanne Smith 1405 Route 18 S, Suite Old Bridge, NJ 08857 C: 732-555-1212 H: 732-555-1212	P 0 75496e	PRIMARY SECONDA B SCAN - Reason SURGEON EXP. ARRIVAL TIME 04:00 PM		
SS: N/A N/A	03-15-1950 (69) Female Deceased Photo Refused	REFERRAL REQUIRED	AUTH/VERIFY REQUIRED PHYSICIAN Jonathan Test	



Show all the Insurance information history in FD (Scheduler)

The system will now display the ICON of the stored image. You select the image in the list and another pop-up will display the insurance card.



Common Workflow Issues with Scheduler (Scheduler)

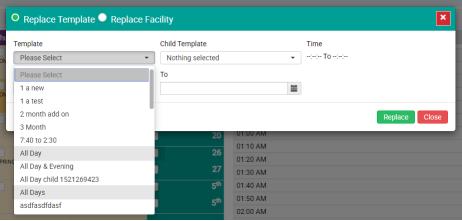
The following outline A-F is to show the best workflow to aid in avoiding problems with the Scheduler.

A. Replace template for provider schedule:

At the time of replacing the template for a provider schedule, a user must be careful about old and new template timing. If there is any variation in timing for instance, a new template is shorter in time from start time or end time then it will result in moving of appointments to the "To Do Reschedule" list. This is a common mistake made by users, the error that has been seen is that users replace a wrong or similar name template without confirming their existing schedule timing. This in turn causes the appointments to move. When attempting to re-assign the exact template, it will not restore automatically. User will need to restore them manually.



For example, in the screenshot below, we have two similar sounding templates "All Day" and "All Days".



Similar name templates

• Replace Template	Replace Facility		×
Template	Child Template	Time	
All Day	Please Select	▼ 08:00:00 AM - 05:00:00 PM	
Child Apply From	То		

"All Day" template timing is 8am to 5pm

O Replace Template	Replace Facility		×
Template	Child Template	Time	
All Days	▼ Please Select	✓ 11:00:00 AM - 03:00:00 PM	
Ohild Analy France	T -		

"All Days" template have short timing from 11 am to 3 pm

Both are timed differently, hence they will lead to appointments which are out of the scope of timings on these templates incase they are used, i.e. if the user intends to use All Day which is from 8 am to 5 pm, but instead uses All Days, any appointment before 11 am and after 3 pm would go to "To Do Reschedule" list.

B. Apply child template later:

A child template could not be applied independently or later. If a template is already applied, then it will not be an active option to choose again at the time of replace template to provide child template list. There is no direct way to apply child template for already an applied parent template. Child template could only be applied at the time of applying parent template.



Template	Child Template		Time	
Please Select	Nothing selected	•	: To::	
Please Select	То			
1 a new				
1 a test				
2 month add on				Replace Close
3 Month				
7:40 to 2:30	20	01:00 AM		
All Day	26	01:10 AM		
All Day & Evening	27	01:20 AM		

Already applied parent template is not available to select.

C. Reflect edited template changes on schedule:

Changes in schedule template will take effect only after making a fresh scheduler cache from Settings > Scheduler > Provider Schedule > Refresh Template. But some time custom entries do exist (custom added label or label removed entries) that were entered earlier then these changes, these will not overwrite by changing template in admin. To remove these entries right click on schedule anywhere and choose add/edit label option, select time range where you feel that labels are not coming as per saved in admin and hit default button from below.

Add / Edit Label(s)	×
Physician Dev, iMW	Facility Toms River
From Time	To Time
Type Labels Procedure	Color
List of All Procedures Nothing selected	•
	Save Remove Default Close

It will reset all existing entries to admin/master label settings. Please note that, do not follow these steps for those time slots where you have already added appointments as it will release appointment replaced labels too (which will result in duplicate/double labels).



imedicware,	, Admin 🧕 💼	WORKVIEW TES	STS MEDICAL HX F	PATIENT INFO DOCS A	CCOUNTING BILLING OPT	TICAL REPORTS SETTINGS	Search patient	Active 🔹 🔍
rovider Schedule								
PROVIDER Admi	in, MedNetwoRx	•		Oct 2019	• Þ	PROVIDER TEMPLATE	10-10-2019	Refresh Template
Monday	in, MedNetwoRx Tuesday	• Wednesday	Image: Market All Image	Oct 2019 Friday	▼ ►	PROVIDER TEMPLATE TOMS RIVER	10-10-2019	Refresh Template
						-	10-10-2019	

Button to create scheduler cache	Button	to	create	scheduler	cache
----------------------------------	--------	----	--------	-----------	-------

D. Removing/Restoring label from scheduler:

At the time of removing labels or restoring already removed labels using the "Default" button functionality (Add/edit label from scheduler screen) sometime user selected entire day schedule timing which result into duplicate/double label by releasing labels that are already replaced by appointment. Sometime users select entire day timing while removing label and then try to restore them which also result into duplicate/double label for whole day.

0		,			
R M	Imedicware , Admin R. (0/0)				
30	Botox			chalaz	
40	Botox	ADD/EDIT LAB	BLOCK TIME	REMOVE LABEL	
50	Botox			chalaz	

Right click on schedule labels and choose Add/Edit Label.

Physician		Facility			
imedicware , Admin R.	•	Surgery Ce	enter		
From Time	· AM ·	To Time	•	•	
Type Procedure	Labels	r; F/U	Color		•
List of All Procedures Nothing selected					
Nothing selected					•

Default button to restore master template settings



If somebody has Changed the label the log of this can be seen under Settings > Scheduler > Provider Schedule > Select the Provider > Check Label Log



E. Restore Appointments from To-Do-Reschedule list:

To restore appointment from reschedule list users need to make sure that a fresh scheduler cache is created, because restore functionality do confirm from cache files that does physician schedule exist for appointment physician, facility, date and time otherwise appointment will not restore even schedule does exist for them.

Sometime users create schedules for different facilities with the same physician and template, then try to restore appointments which does not work. Appointments will restore only if the schedule does exist for the appointment date time for the same physician and facility.

	rare , Admin 🧕 👼	WORKVIEW TES	STS MEDICAL HX F	PATIENT INFO DOCS	ACCOUNTING BILLING OP	TICAL	REPORTS SETTINGS	Search patient Active 💌 🤇
Provider Schedu								
PROVIDER	dmin, MedNetwoRx		44 4	Oct 2019	- F	₩	PROVIDER TEMPLATE	10-10-2019 Refresh Templates
PROVIDER A	Admin, MedNetwoRx	• Wednesday	Thursday	Oct 2019 Friday	• Þ	₩	PROVIDER TEMPLATE TOMS RIVER	10-10-2019 Refresh Templates

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F. Adding appointments without procedure:

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The system does prompt to choose procedure/appointment reason if you are dropping appointments over an appointment type label that is not a valid procedure. However, if you drop an appointment without choosing procedure/appointment reason on a valid procedure type label then it will add appointment with procedure by finding it from label.

PATIENT IMW, Age - 90286 Active	· • • • •	(×) 40					
A&P Check In Cancel Re Schedule	Save Add Appt Appt Hx.		50	Bo	xatox	chalaz		F/U
ge IMW	Reason-	TERTIWRY		Bo	otox - Age IMW - 90286 159159	chalaz		F/U
ncinitas, CALIFORNIA	SURGEON ARRIVAL TIME CL	(Ord.):\$0.00 No CL	10	Bo	otox			F/U
A 90286e	CL REFERRAL REQUIRED	(Sup.): \$0.00 No GL	20	Bo	otox	chalaz		F/U
8: N/A 09-06-2012 (7) /A Male Active	REF. PHYSICIAN P.C.P	PHYSICIAN	30	Bo	otox	chalaz		F/U
Photo Refused	P.	Q -Provider	40	80	otox	chalaz		F/U
analation and Annuality				40				
ATIENT IMW, Age - 90286 Active	🔸 🔍 🍘 🖶 🏓 Save Add Appt Appt H	3	8	40 50	Botox		chalaz	
&P Check In Cancel Re Schedule	Save Add Appt Appt H: PRIMARY SECOND	ary 💿 tertiary		40 50 11 AM			chalez F/U	
ATTENT IMW, Age - 90286 Active AP Check In Cancel Re Schedule e IMW	Save Add Appt Appt H PRIMARY © SECOND Botox • Reaso	ARY 💿 TERTIARY n- 💌 -Reason-	©	Botox - IMW,				
ATTIENT IMW, Age - 90256 Active AP Check In Cancel ReScheduly Perform Anther Cancel Active Active CALFORNIA	Save Add Appt Appt H: PRIMARY SECOND	ARY ③ TERTIARY n- * -Reason- CL(Ord.):50.00		11 AM Botox - IMW,	Age - e		F/U	
PATIENT IMW, Age - 90286 Active &P Check In Cancel Re Schedule	Save Add Appt Appt H PRIMARY © SECOND Botox • Reaso	ARY ③ TERTIARY n- * -Reason- CL(Ord.):50.00	No CL No GL	11 AM Botox - IMIV, 10	Age - e Botox		F/U chalaz	

This will only be true for a "Mandatory" type Procedure Label.

Policy Holder information to Check-in Screen (Scheduler)

To make the check-in process efficient and quicker, the Policy Holder information can now be entered from the check-in screen itself. The user can simply use one screen to complete the entire check-in process from a single screen.

Once the patient is highlighted: Right click > Check-in > Scroll down on the check-in screen to the Insurance screen.

Insurance Plan																Self Pay	Normal-15	5797 -
PRIMARY INSURANCE		AA [¢R						ė	SECONDARY INS	SURANCE		еR					
Primary Ins. Provider MEDICARE		Policy # 123456789				Group #				Secondary Ins. Pro	vider		Policy #		Group #			
Copay Co-Ins 00/00	Ref. Req. No +	Auth Req.		ivation -29-201		舗	Expiration	Date	≣	Сорау	Ref. Req. No	•	Auth Reg. No	Activation Date	鱑	Expiration	Date	
PRIMARY POLICY HOLI	ER									SECONDARY PO	LICY HOLDE	R						
First Name		Last Name				Middle		Suffix		First Name			Last Name		Middle		Suffix	
Althea		Smith				Т				Althea			Smith		Т			
Sub.Relation Self	\$.S		IOB 03-15-1950	Ħ	Gender Female	•	Accept As Accept A	signment Assignment	•	Sub.Relation Self		S.S		DOB	Ħ	Gender Female		
Comments										Comments								
Comments										Comments								



eR Button for 2nd Insurance in Check-in screen (Scheduler)

To check the Patient's eligibility with respect to their Secondary Insurance, the "eR" button has now been added to the check-in screen to make it more efficient and make this screen a one-stop for the entire check-in process.

Insurance	e Plan										Self Pay Norma	I-15797 👻
PRIMARY	INSURANCE		AA [R		e	SECONDARY	INSURANCE	eR			e
Primary Ins MEDICAR			Policy # 123456789		Group #		Secondary Ins.	Provider	Policy #		Group #	
Сорау	Co-Ins 00/00	Ref. Req. No +	Auth Reg. No	Activation Date	Expiration Date	Ħ	Сорау	Ref. Req. No	Auth Req.	Activation Date	Expiration Date	iii

Release information on Check-in Screen (Scheduler)

"Release Information" has been added to the Check-in Screen to allow the user to enter this information here rather than moving in-between the Scheduler and Patient Demographic screen.

Check In Consent	Forms						Smith	n, Althea -	26106	
L Check In CI-01-17-202	0 02:58 PM						ŀ	leard about	us: 🔹	
PATIENT DEMOGRAPHI	cs					Пн	s	🛃 EMR	MORE INFORMATION	
Title First Mrs. • Altr	Name	Middle		Last Nam Smith	ne		Suffix		Patient Photo	Scan License
Marital Status Widowed	Sex Female	•	DOB (mm 03-15-19	n-dd-yyyy): 950		Age 69Year(s)), 10Mon	th(s)		
Social Security	Sexual Or	ientation *	Gender Io	lentity	•	Email-Id]	
ALL COMMUNICATION	ONS					-		+	Race	Language
Street1			Street2						White	 English
1405 Route 18 S, Suite #20	6		Suite #2	06					Notes:	
Zip Code 08857	City Old Bridg	je	State NJ		County Ocean Co	unty	Country USA	1		
Home Phone # 732-555-1212		Work Phone # 732-555-1212		Ext	Mobil 732-555-	e Phone #			Scheduler	Chart Notes
Emergency Name		Relationship		•	Emergenc 7325551				 Release Information 	

Emergency Contact information on Check-in screen (Scheduler)

Users can now enter Emergency Contact information within the Check-in screen, thus making the Check-in screen a one-stop for all the information which is required to complete the check-in process.



Check In Cons	sent For	ms						Smith, A	Althea -	26106
L Check In CI-01-17	/-2020 02:	58 PM						Hea	rd about u	is :
PATIENT DEMOGRA	APHICS						🗌 HS	i 🔽	EMR	MORE
Title Mrs. •	First Name Althea		Middle		Last Name Smith	•		Suffix		P
Marital Status	Filling	Sex		DOB (mm-	dd-yyyy):		Age			
Widowed Social Security	•	Female Sexual Orientation	•	03-15-195 Gender Ide			69Year(s) Email-Id	, 10Month(s	;)	
ALL COMMUNIC	ATIONS		•			•			+	Race
Street1				Street2						White
1405 Route 18 S, Suite	e #206			Suite #20	6					Notes:
Zip Code 08857		City Old Bridge		State NJ		County Ocean Co	unty	Country USA		
Home Phone # 732-555-1212			rk Phone # 55-1212		Ext.	O Mobil 732-555-1	e Phone # 212			🗹 Sch
Emergency Name		Relation	nship		•	Emergency 73255512				♥ R

Expected Arrival Time (Scheduler)

For certain appointments it is expected that the patient would arrive at a pre-defined time before the appointment. To allow the staff to enter this information there is a new Box on the Scheduler "Expected Arrival Time",

Procedure Templetes				Mr. Smith, A Brick	Frank - 670)56 🗙						- <mark></mark>
Active PROCEDURE	PRACTICE CODE	TYPE	APPT. DURATION	EXPECTED ARRIVA	COLOR	DEFAULT TIMINGS	MAX. ALLO	PROCEDURE MESSAGE	REFERRAL			ABLE STATUS
(LP)YAG Vitreolysis	(LP) YAG		10 Min	NA	🥖 iMec	dicWare - Internet Ex	plorer					
A Scan	AS		10 Min	NA	🦲 https	z//eclimedicware.co	m/imwdev_s	print/interface/admin/sch	eduler_admin	/procedure_te	mplate/open	.php?pro_id=12
Acute	AE		10 Min	NA	PROC	EDURE TEMPLAT	E					
ANTERIOR VITRECTOMY	ANTERIOR VITRECTOMY		20 Min	NA		dure Name			APPT.	EXPECTED ARRIVAL (IN		
Argon Laser of Lattice Degeneration	Argon Laser of Lattice Degenera		10 Min	NA	Botox			PROVIDER	10 Min *	MINS.)	ALLOWED	PROCEDURE ME
Argon Retinal Hole/Tear	Argon Retinal Hole/Tear		10 Min	NA		ning selected	v	All	IO MIN +	10		
Argon Retinal Laser PRP	Argon Retinal Laser PRP		10 Min	NA	Botos	(/				
ASCAN/FU	ASCAN/FU		10 Min	NA		er Group vinistrators, Billing, Nur	ser My: •					
B SCAN	B SCAN		20 Min	NA	Color	Type None	•					
Botox	Botox		10 Min	10	Re	ferral Required				Add Provid	er Save	Close
CATARACT	CAT		20 Min	NA		th/Verify Required						
Cataract Extraction with Femtosecond Laser and Intraocular Lens Implant with possible Astigmatic Kerstotomy	Cataract Extraction with Ferntos		30 Min	NA	No	on-Billable						

The user can add the time manually or make use of the functionality where this has been setup under

Settings > Scheduler > Procedure Template > Expected Time of Arrival.



ysicia	an D	ev, il	ЛW				•	Fac	ility	Tom	s Rive	r				·				
	1	7	31		«	<	Ja	nuary	2020	D			•	>	×	≥		(То	day
		JAN	UARY	202	0			1	FEBR	UAR	Y 202	0				MA	RCH	2020		
SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT
29 Dec	30 Dec	31 Dec	1	2	s	4	26 Jan	27 Jan	28 Jan	29 Jan	30 Jan	31 Jan			2	3	4	5	6	7
5	6	7	8	9	10		2	3	4	5	6	7	в	8	,	10	11	12	13	14
12	15	14	15	16	17	18	9	10	n	12	13	14	15	15	16	17	18	19	20	21
19	20	21	22	23	24	25	16	17	18	19	20	21	22	22	23	24	25	26	27	
26	27	28	29	30	31	1 Feb	23	24	25	26	27	28	29	2.9	30	31	1 Apr	2 Apr	з Арг	4 Apr
PAT	TEN	Г				A	ctive			•	Q	6	급	<i>e</i> R	RTE	/V				
Cano	el:	Ch	eck Ir	١	Chec	k Out	R	e Sch	edule	•	Save		Add A	ppt	Ap	pt Hx				
Mr. A I	Frank	Smith			0			0	PRIM/	ARY		۲	SEC	ONDAR	Y	۲	TER	TIARY		3
405 F	Route	18 S, S	Suite						ASC	AN/FI	U	•	-Re	ason-		•	-R	eason		
Old Bri	idge, I	4J 081	357				Γ.		SURG	EON		EXP. TIM	ARRIV	AL	CL	Ord.):	\$0.00		No	CL
N: 732	2-555-	1212				670					-		50 PM				\$0.00)		GL
t: 73 2	2-555-	1212				670						02								
55: N/	A					3-15-19 Male		·	<u> </u>		RALRE				_			Y REQU		
no em	ail						Refus		Patie	ent is	VIP:	No Co	opay, I	No Re	fracti	on, N	o Bill	, No B	alan	ce
									REF.	PHYSI	CIAN	-	P.C.	Р		_		SICIAN		
									Abs	ate, Ho	olly	Q	Sal	bo, Mile	drec	Ω	P	rovide	ſ	-

Note: If there is no Expected Arrival time set up, there would be no time populating.

If the Procedure has a setup of the Expected Arrival time and the appointment is rescheduled, the expected time of arrival will adjust automatically.

REPORTING

Added an additional filter for reports: Crediting Provider.

PRACTICE FILT	ER			
Groups		Facility	Department	
Select All	•	Select All 🛛	Select All	
Billing Provider		Crediting Provider	Operator	
Select All	-	Select All	Select All	

This has been added for the following reports:

- a. Practice Analytics
- b. Provider Analytics
- c. Provider Revenue
- d. Referring Revenue



- e. Facility Revenue
- f. Deferred/VIP
- g. Ledger
- h. Insurance Analytics
- i. CPT Analysis
- j. Referring Physician
- k. Allowable Verify
- I. Credit Analysis
- m. Deleted Payments
- n. Provider A/R

Change made for a new North Carolina state report (Reporting)

Access the report by going to Reports > State > NC State. This will open the applicable state report filter screen where you can then choose UB04 & HCFA or separately UB04 or HCFA. By selecting the filters, and then selecting search, the report will display.

eclimedicware.com/imwdev_sprint/int	terface/core/inde	x.php#							
👤 📸 Dev, iMW 👰 👼	WORKVIEW	TESTS	MEDICAL HX	PATIENT INFO	DOCS	ACCOUNTING	BILLING	OPTICAL	REPORTS
	SETTINGS						Scheduler		KY State Report
NC State Report						s. Smith, Althea [·] Lake	Practice An	alytics	TN State Report NC State Report
PRACTICE FILTER		7					Financials		IL State Report
Groups Provider Select All - Select All	•	REPORT					Compliance		
Period							CCD		
Daily	•	FILTER							
ANALYTIC FILTER		~					API		
Ins. Carriers Select All		<					State	\rightarrow	
INCLUDE		Γ.					Optical		
UB04 & HCFA UB04	HCFA						Reminders		
							Clinical		
							Rules		
							iPortal		



Referring Doctors Report (Reporting)

A new report was created to allow users to filter specifically by Referring Doctor and see the activity from each one of their referring doctors.

PRACTICE FILTER	
Groups	Facility
Select All -	Select All -
Provider	Referring Physicians
Select All 👻	
Period	
Daily	•
-	Physicians Type
🔘 Summary 🔘 Detail	Referring Physician
ANALYTIC FILTER	All
CPT Code	Referring Physician
Select All ·	Primary Care Physician
Ins. Group	Co-Managed Physician
Select All 🔹	Not Associated PCP
Encounter Type All Initial	
GROUP BY	
Physician Facility	O CPT Code O Dx Code
FORMAT	
View Only PDF	O csv

Itemized Account Printout (Reporting)

A new solution was implemented to change the itemized printout report and include both the primary and secondary as separate items on the report with it totaling the entire charge including the deductible. The tertiary insurance is also separated out if it exists.

Patie	ent Payment S	ummary					Smith,	Althea T -	26106			DOB : 03	15-1950	(69 Yr.)	SS#:			
Grou	p Name : IMed	licWare T	est Practic	e											Created	by : ID or	n 01-08-20	10:16 PM
S.No	DOS	E. Id	Ins. Case	CPT	CoPay	Charges			Payme	ent Detail	s			Pt	Ins.	New	D	ate
5.NO	. 005	E. 10	ins. case	CPI	CoPay	T.Charges	Allowed	Deduct	MEDICAR	AARP	•	Pt Paid	Adj	Balance	Balance	Balance	Posted	Submitted
1	01-03-2020	404434	Normal	Multi	\$0.00	\$313.09	\$313.09	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$313.09	\$313.09	01-03-2020	-
	Initial Hospital	Visit III		99223	0.00	\$216.37	\$216.37	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$216.37	\$216.37		
	Ophth Int. Est.			92012	0.00	\$96.72	\$96.72	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$96.72	\$96.72		
2	12-03-2018	401985	Normal	Multi	\$0.00	\$371.22	\$371.22	\$0.00	\$291.04	\$0.00		\$0.00	\$5.94	\$0.00	\$74.24	\$74.24	12-03-2018	12-04-2018
	Ophth. Comp.	Est.		92014	0.00	\$138.87	\$138.87	\$0.00	\$108.88	\$0.00	\$0.00	\$0.00	\$2.22	\$0.00	\$27.77	\$27.77		
	computerized	imaging-re	etina	92134	0.00	\$45.97	\$45.97	\$0.00	\$36.04	\$0.00	\$0.00	\$0.00	\$0.74	\$0.00	\$9.19	\$9.19		
	Injection			67028	0.00	\$111.38	\$111.38	\$0.00	\$87.32	\$0.00	\$0.00	\$0.00	\$1.78	\$0.00	\$22.28	\$22.28		
	Supply of Ava	stin		J9035	0.00	\$75.00	\$75.00	\$0.00	\$58.80	\$0.00	\$0.00	\$0.00	\$1.20	\$0.00	\$15.00	\$15.00		
3	11-30-2018	401811	Normal	Multi	\$0.00	\$202.80	\$202.80	\$0.00	\$159.00	\$0.00		\$0.00	\$3.24	\$0.00	\$40.56	\$40.56	11-30-2018	12-03-2018
	Ophth. Comp.	Est.		92014	0.00	\$138.87	\$138.87	\$0.00	\$108.88	\$0.00	\$0.00	\$0.00	\$2.22	\$0.00	\$27.77	\$27.77		
	Fundus Photo	s		92250	0.00	\$63.93	\$63.93	\$0.00	\$50.12	\$0.00	\$0.00	\$0.00	\$1.02	\$0.00	\$12.79	\$12.79		
4	11-30-2018	401799	Self Pay	MACPROCOM	\$0.00	\$37.00	\$37.00	\$0.00				\$37.00	\$0.00	\$0.00	\$0.00	\$0.00	11-30-2018	-
5	11-30-2018	401795	Normal	MACPROCOM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	11-30-2018	
6	04-27-2018	372623	Normal	Multi	\$0.00	\$184.84	\$184.84	\$36.96	\$144.92	\$36.96		\$0.00	\$2.96	\$0.00	\$0.00	\$0.00	04-27-2018	04-30-2018
	Ophth. Comp.	Est.		92014	0.00	\$138.87	\$138.87	\$27.77	\$108.88	\$27.77	\$0.00	\$0.00	\$2.22	\$0.00	\$0.00	\$0.00		
	computerized	imaging-re	etina	92134	0.00	\$45.97	\$45.97	\$9.19	\$36.04	\$9.19	\$0.00	\$0.00	\$0.74	\$0.00	\$0.00	\$0.00		

EYE CARE

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Add all communication information to search feature for Referring physician (Reporting)

The system had the ability to search but was limited to first name, last name and phone and now these search criteria are to include phone, address, and fax #.

lame	Address	Practice Name	Phone Number	Fax Number	ID
imithers, Wilda	1405 Route 18 S, Suite #206, Lakewood 08701				37
		¢			

Cash Lag Analysis report (Reporting)

A new report to help the users determine the total charges for a month and how many months thereafter it took to collect the monies related to those charges. Report is available under Reports > Financials > Analytic > Cash lag Analysis Filters on the report are Groups, facility, Provide (~Billing Provider), Crediting Provider and Period. Users can exclude charges where Billing and Crediting providers are the same. Also, the report can be viewed or can be exported to CSV.

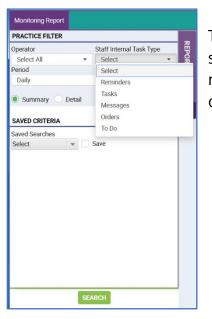
This report will show the month's total charges, and how many months thereafter it took to collect the monies. Whatever is remaining out of those charges thereafter per month will be shown up to 20 Months.



REPORTS SETTINGS						
Scheduler	Daily		Account Receivable			
D	FD Collection		Provider A/R			
Practice Analytics	Day Sheet		Days In A/R			
Financials	→ Payments		Unworked A/R			
Compliance	Daily Balance		A/R Aging Insurance			
Compliance	Unapplied Superbills		A/R Aging Patient			
CCD	Unfinalized Encounters		Custom AR			
API	Unapplied Payments		Claims			
	Copay Reconciliation		Unbilled			
State	Adjustment Report		Top Rejections			
Optical	Refund Report		Denial Records			
	Front Desk		PT Collections			
Reminders	Day Close Payment Report		Assessment			
Clinical	Prepayments		Report			
Rules	Analytic		Previous HCFA			
Rules	Practice Analytics		Previous UB04			
Portal	Provider Analytics		EID Status			
	Provider Revenue	Cash Lag Anal	yses			
	Referring Revenue	PRACTICE FILT	ie de			
	Facility Revenue					
	Deferred/VIP	Groups		Facility		ä
	Ledger	Select All	•	Select All	•	E
	Insurance Analytics	Provider Select All	•	Crediting Provider Select All	•	
	CPT Analysis	Select All	•	Select All	•	
	Referring Physician	Exclude wh	ere billing and creditin	ig providers are same		
	Allowable Verify	Period				
	Credit Analysis	Daily		•	DOS	
	Deleted Payments	FORMAT				
	Patient Report	-				-
	Modified Encounters	View Only	\bigcirc (CSV		
	Yearly					
	Provider RVU					
	Transaction Details					
	Itemized Receipts					
	Custom Analytics					
	Procedure Payments					
	Cash Lag Analyses					-
	Office Production					
	Number Of AR Touches					



Add a report for monitoring messages for office managers (Reporting)



The new report will allow the practice to pull a report to show operators and open and or outstanding items that need to be completed and or followed up by aa operator.

Add columns to CPT Analysis report (Reporting)

Column for CPT description has been added to multiple different reports to satisfy the need to see and read the description of the applicable CPT codes represented by numbers.

PRACTICE FILTER Groups Select All	Facility		CPT Analysis Selected Gro Selected CPT		y)
Provider	Crediting Provider			a national states with the	Desc
Select All	 Select All 	-	Physician: D 99223	ev, iMW	
			99223	Initial Hospital	Visit III
	billing and crediting provider	s are	92012	Ophth Int. Est	
same			92014	Ophth. Comp.	Est.
Departe					Mr
Reports					Bri



Add search filter to CPT Analysis report (Reporting)

PRACTICE FILTER	1		0	_
Groups		Facility		REPORT FILTER
Select All	•	Select All	-	ନ୍ନ
Provider		Crediting Provider		
Select All	-	Select All	1	5
Exclude where	• billing an	Select All d crediting providers a	• re	
same				1

Crediting Provider is added to most all reports

Change the default for Crediting Provider to equal Billing Provider on Service Charge (Reporting)

The Billing Provider will now automatically always default to the Crediting Provider field. If it is false then the user can simply add a different provider to the field.

Groups	Claim type	DOS	
iMedicWare -	Profession -	01-10-2020	
Billing Provider		Credited Provider	
Test, Yun Ja		Test, Yun Ja	•

Add another level of CPT organization - services vs material (Reporting)

Now the system has multiple category settings for EACH CPT code. The user can now build into the reporting the ability to have multiple categories for a CPT to filter

CPT			
	CATEGORY Avenova	Edit Record	
	Avenova	Category Avenova	Category 2
		Units	Service Material

and separate services vs materials. So long as this Category 2 has been used and activated then the reporting filter can make the necessary distinction in the report. As an example, below is a screenshot of the CPT analysis report:

CPT Analysis					
PRACTICE FILTER	2		0		
Groups		Facility			
Select All	•	Select All	-		
Provider		Crediting Provider			
Select All	-	Select All	-		
Exclude where billing and crediting providers are same					
Charges Method	Period				
Total Charges	▼ 08-01-2018	01-30-2020	+		
🔾 Summary 🧕	Detail	● DOS ○ DOR ○ DOT			
ANALYTIC FILTER	2				
CPT Category		CPT Code			
Select All	•	Select All	-		
CPT Category 2		Ins. Group			
Service	*	Select All	•		
]	Sort By			
Select All	Deselect All	Date of Service	-		
Service	~				
Material CPT Category	O Ins Gro	Procedure ups (Pri.			
	Ins)				



Breakdown service vs material in Provider AR report (Reporting)

Financial - Prov	rider A/R				
PRACTICE FILT	ER	0			
Groups	Provider	Crediting Provider			
Select All	Select All -	Select All 🔹			
Exclude whe	ere billing and	Facility			
crediting pro	oviders are same.	Select All 🝷			
Department	Period				
Select All	Daily	•			
Operator					
Select All		C 🔘 DOR 🖲 DO			
Time From Time To					
Select -	Select - Select - Detail				
ANALYTIC FILT	ER				
Ins. Group	Ins. Carr	iers			
Select All	▼ Select	All 👻			
CPT Category 2					
Select All	•				
Select All	Deselect All				
Service		Physician			
Material					
INCLODE					
Appt Detail	Appt Summar	y 🔲 CI/CO/Pre- Pay			
Payments	Adjustments	Summary Charges			
	SEARCH				

The system will now provide filters for the Provider AR report. These gives users the ability to look at services or materials separately, or leave it combined. The Category 2 box selection is what is used to change the different report functions.

Add new report for "Crediting Provider AR" (Reporting)

Financial - Pre	ovider A/R		
PRACTICE FIL	TER		0
Groups	Provider		Crediting Provider
Select All	✓ Select All	-	Select All -
Exclude wl	here billing and		Facility
crediting p	providers are same	e.	Select All 🔹
Department	Period		
Select All	- Daily		•
Operator			
Select All	→ O DOS C	DOC	c 🔘 dor 🔘 do
Time From	Time To		
Select 🔻	Select 👻 🦲	Sum	mary 🔵 Detail
ANALYTIC FIL	TER		
Ins. Group	In	s. Carri	iers
Select All	-	Select	All 👻
CPT Category	2		
Service, Mat	erial 👻		

The system did not have ability to separate billing provider from crediting provider to differentiate the revenue for providers.

The new report allows you to see the Crediting Provider only and you can also choose either services / materials or both together. A check box is also available to "Exclude where billing and crediting providers are the same".



Add crediting provider as a search filter to all financial reports (Reporting)

Crediting Provider its added to all financial report filter areas. The exclude checkbox is used to avoid duplicates where both billing and crediting are the same – this will help avoid pulling those types of records to the report.

PRACTICE FILTE	R	0
Groups	Provider	Crediting Provide
Select All 🔻	Select All 🔻	Select All 🔹
Exclude whe	re billing and	Facility
crediting pro	viders are same.	Select All 🔹

Daily Balance (Reporting)

New filter added into the report to allow the user to select either "With Deleted/Applied" or "Without Deleted/Applied" – this way they can establish their daily balance one or two ways based on the filters set.

Daily Balance				
PRACTICE FILTE	R			0
Groups	Facility		Provider	
Select All 🔹	Select A	411 -	Select All	•
Operator	Period			
Select All 🔹	Daily			•
Department		-		
Select All	-	Sumr	nary 🔘 De	tail
🔿 dos 🔿 do	C 🔿 DOF	x 🖲 do	Time	- •
ANALYTIC FILTE	2			
Ins. Group		Ins. Carrie	er	
Select All	-	Select A	All	*
Payment Method		Report Ty	ре	
Select	-	Select		•
Un-processed	1	Select		
GROUP BY		With De	eleted/Applied	I
Groups Operators			t Deleted/App	
INCLUDE				
Appt	Transactio	ins 📃 (Count Summa	ary
FORMAT				
View Only			⊖ csv	
	SE/	ARCH		

Custom Report request (Reporting)

EID Status report was extended to include the requested fields and this automatically exports the results to a CSV format by default. Reports > Financial > EID Status.

AutoSave 🤍 🖬 🦻					eid	_status_1578676	471 - Excel					Messier 🖾	
File Home Insert	Page Layout For	nulas Data F	Review View	Help 🔎 T	ell me what you	want to do						ය Share	PC
Copy -	Calibri - 11 B I <u>U</u>		= = ≫. = = ⊡ ⊡	한 Wrap Text 텔 Merge & Cent	General ser + \$ + %	. 9 58 -88	Conditional	Format as Ce Table + Style	Il Insert Delete	Format ↓ Clear	ZY >		
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	Font ✓ f/x Patient	r,	Alignme	ent	rs Nu	mber Fs	1						
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1 - i ×	C D CP	E F	G H DX Codes Modifi	I iers Units Char	J K	L Charge Ba Insu	M N	Styles O It Par Charge Par	Cells P Q Adjustmen Claim ID		Editing	U V ng Enti Location	Physicia

Custom Label audit log (Reporting)

Within Settings > Scheduler > Provider Schedule we have created the ability to add two different ICONS to the system once a provider is selected. Once a provider is selected the two new ICONS will appear.



This ICON will launch the Provider Scheduler Log

This ICON will launch the Front Desk Label Log. Select custom label log and a log will appear which will provide detail on label added, removed and restored from front desk/scheduler.

rovid	er Schedule Lo	g							
SR.	WEEK DAY	CAL. DATE	FACILITY	TEMPLATE	SUMMARY	FOR FUTURE	USER	IP	TIMESTAMP
1	week3 day4	01-16-2020	Toms River	Dr W Thursday	Schedule added from frontdesk	no	Dev, iMW	10.1.25.200	01-16-2020 06:21 PM
2	week2 day2	01-14-2020	Toms River	Chain events testing	Schedule added by replacing template (a)	yes	Dev, iMW	10.1.25.200	01-14-2020 11:33 AM
3	week1 day1	01-06-2020	Brick		Schedule added by replacing template (a)	no	Dev, iMW	10.1.25.200	01-06-2020 07:48 PM
Custo No log	m/Front desk L found	abel Log							Close

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60

Report - Procedures Payments expanded to show more details (Reporting)

Report expanded to now include new fields and to show the details for the anesthesia billing. System must be setup: Settings > Admin > Users > Privileges – new added report

			ir. Smith, Aaron R - 3253 oms River				"Procedure
Edit New Record	Privileges						Payments".
PROVIDER Provider Type Se Physician Te Title First Name	Manager Ins. Management Statements	 Accounting Account History Day examples 	Silling Charges				
Te Pit - IMW	🖾 REPORTS 🗹 MAN	IAGER	-	Financials Privileges	1		
Te Nick Name Te Default Facility	CCD Reminders	 Practice Analytics API Clinical 	 Financials State Rules 	Select All	Payments	Daily Balance	
Toms River				Provider Revenue Unworked Ave Unworked Ave Unapplied Superbility	Referring Revenue Unbilled Unfinalized Encounters	Facility Revenue Top Rejections Deferred/VIP	
				Adjustment Report	A/R Aging Insurance	 A/R Aging Patient Denial Records 	
				Credit Analysis	Deleted Parments Provider RVU	Patient Report	
				Itemized Receipts	Prepayments	Procedure Payments	

Need DOS to be added to insurance analysis report (Reporting)

PRACTICE FILT	ER		0
Groups	Facility	Department	
Select All	Select All 🔹	Select All	*
Billing Provider	Crediting Provider	Operator	
Select All	Select All	Select All	*
Exclude wh same Period	 Select All ere billing and crediting 		•
Exclude wh same			•
Exclude wh same Period Daily			•

The system now has the DOS (date of service) available as an option within the filters section.



Appointment Information Report (Reporting)

PRACTICE FILTE	R			
Facility			Provider	
Select All		-	Select All	
Period				
05-18-2017		01-1	7-2020	+
ANALYTIC FILTER	R			
Insurance Group				
Medicare				-

The filter for Insurance Group has now been added into the Appointment Information report.

Scheduler Time Utilization report (Reporting)

The system can now display a time utilization report based on the total available time for any provider versus the actual booked time. This is a very useful report to be able to help a practice maximize a provider booking time.

Itilization				2 Toms River				
Time Utilization	(detail)		Start Date : 12-	11-2018		Created By	: iD on 01-21-2020 12:03 AM	
			Provider : All			Include: N	one	
PRACTICE SUI	MARY							
	11-Dec	12-Dec	13-Dec	14-Dec	15-Dec	16-Dec	17-Dec	Wk Totals
Avail	1570	1030	1130	1170	390	0	1280	6570
Book	760	1170	1020	1060	120	0	950	5080
Open	830	290	370	410	270	0	380	2550
% B/A	48.41%	113.59%	90.27%	90.60%	30.77%	0%	74.22%	77.32%
Dev, iMW	Bric	k	Spring Lake Hts	Surgery Center	Toms R	iver	Whiting	Wk Totals
Avail Min	0		0	0	660	the deter	0	660
Book Min	0		0	0	0		0	0
Open Min	0		0	0	660		0	660
% B/A	0%		0%	0%	0.00%		0%	0.00%
Test, Brian	Bric	k	Spring Lake Hts	Surgery Center	Toms R	iver	Whiting	Wk Totals
Avail Min	420		420	490	850		0	2180
Book Min	430		380	460	1090		0	2360
Open Min	10		90	70	20		0	190
% B/A	102	38%	90.48%	93.88%	128.249	6	0%	108.26%
Test, IOL	Bric	k	Spring Lake Hts	Surgery Center	Toms R	iver	Whiting	Wk Totals
Avail Min	0		0	0	0		0	0
Book Min	0		0	0	500		0	500
Open Min	0		0	0	0		0	0



	AutoSave 💽 off)	1 5·0·•	:	time_uti	lization - E	kcel	Jim N	Messier [ন দ		×
Fi	ile <mark>Home</mark> Ins	sert Page Layo	out Form	iulas Da	ta Revie	w View	Help	ר ⊂ ∕	me	ß	Q
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A1		$\times \checkmark f_x$	Time Uti	lization (su	mmary)						~
1	A	В	C	D	E	F	G	Н	I	J	
1	Time Utilization (su	Start Date : 12-1	Created By	: iD on 01-2	21-2020 12:	01 AM					
2	Facility :All	Provider : All	Include: No	one							
3	Provider	11-Dec	12-Dec	13-Dec	14-Dec	15-Dec	16-Dec	17-Dec	Wk Total		
4	Dev, iMW	0.00%							0.00%		
5	Test, Brian	102.38%	93.88%	150.00%	90.48%			108.89%	108.26%		
6	Test, IOL								0.00%		
7	Test, Jane		170.59%	90.00%	63.89%			60.00%	83.74%		
8	Test, Jonathan	67.35%	45.95%	34.88%	51.28%	30.77%		51.16%	47.60%		
9	Test, Shore								0.00%		
10	Test, Surgeon								0.00%		
11	Test, WH								0.00%		
12		48.41%	113.59%	90.27%	90.60%	30.77%		74.22%			
13											
14											
15											
16											

Unprocessed superbill from Day Sheet (Reporting)

New column added to the Procedure Template called Billable Settings > Scheduler > Procedure Template. This allows the user to mark a procedure billable / nonbillable. If marked nonbillable then those procedures will not appear in the Day

Procedure Templates				Mns. Smit SpLake	th, Althea	T-26106					
Active - PROCEDURE	PRACTICE CODE	TYPE	APPT. DURATION	EXPECTED ARRIVAL	COLOR	DEFAULT TIMINGS	MAX. ALLOWED	PROCEDURE MESSAGE		AUTH/VERIFY REQ.	BILLABLE
Argon Laser of Lattice Degeneration	Argon Laser of Lattice Degenera		10 Min	NA	-		NA		No	No	Yes
Argon Retinal Hole/Tear	Argon Retinal Hole/Tear		10 Min	NA			NA		No	No	Yes

Sheet report.



Procedure Name		APPT.	EXPECTED ARRIVAL (IN	MAX.		
Argon Laser of Lattice Degeneration	PROVIDER	DURATION	MINS.)	ALLOWED	PROCEDURE MESSAGE	
Labels	All	10 Min •				
Nothing selected +	1					1
Practice Code	Dev IMW	10 Min •				×
Argon Laser of Lattice Degeneration						A
Provider Group						
Administrators, Billing, Nurse, Phy: -						
Color Type			Add Provider	Save	lose	
Color Type			Add Provider	Save	llose	
Color Type			Add Provider	Sine	Slove	

Once in the Procedure Template screen you can now select the Billable column (new) and this will bring the pop-up. Here you can check mark "Non-Billable" and define this for all providers or a selected provider.

Lot# on Clinical Report

Providers can also search by Lot number on Clinical Report. Users need to go to Reports > Clinical > Clinical Report > Lot#.

Clinical Report	Surgery Center		
PRACTICE FILTER			
ICD10 Codes Select All - Include Exclude	Please check exported csv file.		
CPT Code Select All	WPS Office What's New Schinical_report (1).csv 🖓 • 🕇		
Alphagan P - 12345 O Include C Exclude	= Menu V 🖻 🛱 ⊅ 🛱 🗘 🤌 🖓 マ 🖬 Home Insert Page Layout Formulas Data Review View	Tools Q Click	to f
Medication Allergy Include Exclude Weight (kg) Height (m)	Paste* Capy Format Painte* B I U T A ⁺ A ⁺ T T	% 000 +0 00	Conditional For Formatting * Ti
= • = • • Include Exclude	A1 • ®, fx Clinical Report		
Include Exclude	A B C D 1 Clinical Report Date : To : Created byID on 11-11-2019 05:53 PM	E F	G
Laboratory	2 Patient Name-ID Selection Criteria DOB(Age) Address	Phone Email-II	D Last DOS 2019-11-05
Observation Range From Range To > ▼ < ▼ ♠	3 Test, Qa - 266183 Alphagan P Lot#12345, 08-04-2019 (0). Sdfsf Dgdg 4 5 5 5 5 5	423423423	2013-11-05

Denial Rate must exclude refractions (Accounting)

The report now has a new filter to exclude refractions. If the checkbox is set then the report will NOT show refractions any longer as a denial. In the image the selection to not include Refractions is checked off.



Denial Records			
PRACTICE FILTER			0
Groups		Facility	
Select All	•	Select All	•
Physician	Denial Pe	eriod	
Select All 🔹	Daily		•
Ins. Group		Ins. Carrier	
Select All	•	Select All	•
• DOR O DOT			
INCLUDE			
No Refraction			

ACCOUNTING

Another level of CPT organization has been introduced as a way for Practices to divide their CPTs by Services and or Materials. (Accounting)

This would not only help divide the CPTs, but also has been introduced as part of various reports so data can be viewed accordingly. To set mark whether the CPT is a Service or Material, Users need to go to Settings > Billing > CPT > CPT Category2 > Select Service/Material > Save.

Edit Rec	cord												×
Category Avenova		Category 2	Cpt4 Code AVENOVA		Insurance E Yes	Billed	Practice Code AVENOVA			Description Avenova			\sim
Units 1		Service Material	CVX Code		Rev Code		Departments AVE	NDC#/Comr	ments	Unit of Measu	re •	Measurement	
TOS 1		POE	Mod1	Mod2	Mo	od3	Status Active	Tax • No	•	Value Set			
Dx1	Dx2	Dx3	Dx4	x5	Dx6	Dx7	Dx8	Dx9	Dx10	Dx11	Dx12	+	
						Save						Close	e

However, if this is not set for a CPT, it would work as before. Reports for which this filter has been provided as part of the Analytic filters are:



ANALYTIC FILTE	R					
Insurance Group		Ins. Carrier	s		Ins. Types	
Select All	•	Select Al	I	•	Primary	-
ICD10 Codes		CPT Catego	ory		CPT	
Select All	-	Select Al	I	•	Select All	-
CPT Category 2		Registe	ered Fa	cility		
Select All	•			í		
Select All	De	select All				
Service			ient		Physician Procedure	
Material			ient			
(00)						

- a. Insurance Analytics
- b. Facility Revenue
- c. Referring Revenue
- d. CPT Analysis
- e. Provider Analytics
- f. Practice Analytics

Please note in case this is not setup for any CPT, these reports would work the same way as before.

Description of CPTs on Charges Ledger (Accounting)

For a claim which has multiple charges on it, usually the word "Multi" is seen on the charges ledger, the user can of course hover and see the CPTs, but now one can select the Line number and the line can expand to show the CPT and their description along with Summary of each line.

Select the Patient from Search > Accounting > Charges Ledger > If User select "S.No", All charges with Multiple CPTs would expand or the User can select at the number of the charge line and only that particular charge "Multi" would expand.

harges l	Ledge	er							rs. Smit sLake	h, Althe	a T-2	26106	×	ERA Cla	ima Statem	ients A&P N	lotes HD	S DOB: X 03-15-19	Pri: 50 Sec :	🛃 E
🗹 All	Cha	irges	Unpaid Charge	s Gr	oup: Sele	ect Gro	up	DOS From: All				DOS To: A		- 1	ns. Case:	Select Case	•	E.Id:	Active 🔻	Page #: 📘 🔻
S.No.		DOS	E. Id	СРТ	Auth#	Prov	/iders	Dx. Codes	M	odifier	s		insuranc	æ		Char	rges		I	Date
						I			I	I		Primary	Sec.	Tertiary	Posted	Deposit	Paid	Balance	Posted	Submitted
1		01-03-2020	404434	Multi		ID	BT	C44.311				MEDICARE	AARP		\$313.09	\$0.00	\$0.00	\$313.09	01-03-2020 -	
	Ini	itial Hospital Vis	it III	99223				C44.311				MEDICARE	AARP		\$216.37	\$0.00	\$0.00	\$216.37		
	Ор	ohth Int. Est.		92012				C44.311				MEDICARE	AARP		\$96.72	\$0.00	\$0.00	\$96.72		
2		12-03-2018	401985 58	Multi		JT		H35.3221, H35.3111, H35.3122	Multi			MEDICARE	AARP		\$371.22	\$0.00	\$291.04	\$74.24	12-03-2018 -	12-04-2018
	Ор	ohth. Comp. Est.		92014				H35.3221, H35.3111, H35.3122	25			MEDICARE	AARP		\$138.87	\$0.00	\$108.88	\$27.77		
	co	mputerized ime	ging-retina	92134				H35.3221				MEDICARE	AARP		\$45.97	\$0.00	\$36.04	\$9.19		
	Inj	ection		67028				H35.3221	LT			MEDICARE	AARP		\$111.38	\$0.00	\$87.32	\$22.28		
	Su	pply of Avastin		J9035				H35.3221				MEDICARE	AARP		\$75.00	\$0.00	\$58.80	\$15.00		
3		11-30-2018	401811 58	Multi		BT		H35.3111, H35.3122, H02.015, H43.811, H11.153, H04.123, H26.493, H35.3221				MEDICARE	AARP		\$202.80	\$0.00	\$159.00	\$40.56	11-30-2018 *	12-03-2018
	Op	ohth. Comp. Est		92014				H35.3111, H35.3122, H02.015, H43.811, H11.153, H04.123, H26.493, H35.3221				MEDICARE	AARP		\$138.87	\$0.00	\$108.88	\$27.77		
	Fu	indus Photos		92250				H35.3221				MEDICARE	AARP	-	\$63.93	\$0.00	\$50.12	\$12.79		

To collapse, select the line number/ "S.No." again.



Insurance ID on Payments Ledger and Charges ledger screen (Accounting)

Patient's Active Primary/Secondary Insurance IDs will now display on the top right-hand corner of the screen, besides the DOB. This enhancement has been done for easy availability of the Insurance Information for a Patient.

	. Smi ck	ith, A	Frank	: - 67056	3	ERA	Claims State	ements A&P		NS DOB: HX 03-15-19	Pri: 1234567 954 Sec: 1234567	
From: All		•		DOS To:	All	-	Ins. Case	Select Ca	se 🔻	E.Id:	Active -	Page
	м	lodif	iers	Ir	surance			Cha	rges			Date
	1			Primary	Sec.	Tertiary	Posted	Deposit	Paid	Balance	Posted	
			-	MEDICARE	MON3		\$138.87	\$0.00	\$0.00	\$138.87	01-06-2020	•
	-		-	MEDICARE	MON3		\$365.00	\$0.00	\$365.00	\$0.00	06-19-2014	•
1, 367.4			-	MEDICARE	MON3		\$193.28	\$0.00	\$190.67	\$0.00	12-10-2014	•
					Total:	\$697.15	\$0.00	\$555.67	\$138.87			
				Fin	al Total:	\$697.15	\$0.00	\$555.67	\$138.87			

Please note for a patient who is self-pay, this would be blank.

Co-insurance options are not in manual posting (Accounting)

The system now has "Co-Insurance" added into the drop down menu for Method on Accounting > Service Payments.

Method		CC / Ch.#	P	aid	Balance	
	•		4	\$0.00	\$0.00	01-
Toms River	Paid		>			
	Depo	osit	۶			01-2
	Patie	ent/Guarantor	>	Patie	ent Pre Pmts	
_	Insu	rance	>	Chec	k In/Out	
	Upda	ate Amount	>	Colr	nsurance	
	Dedu	uctible		Disc	ount	
	Retu	rned Check		Adju	stment	>
	Refu	nd	>			_
			_			



Add Credit Card Option (Accounting)

Credit Card is now added to all drop downs in the ERA payment areas along with other Payment method options.

RA Post Payments					Mr. Smith, A Frank - 67056 Brick
Gearch By Insurance	Select Group	-	Match Units	Paper	
Insurance All 👻		Q	W/O Code :	•	Method :
Claims File - Che	eck Date Amount	Not	ſ		Cash Check Credit Card
					EFT Money Order VEEP

Previous UB04 - confirm in email (Accounting)

The system now allows you print a previous UB04 form and you can select a date and or date range. User needs to go to Reports > Financial >Previous UB04

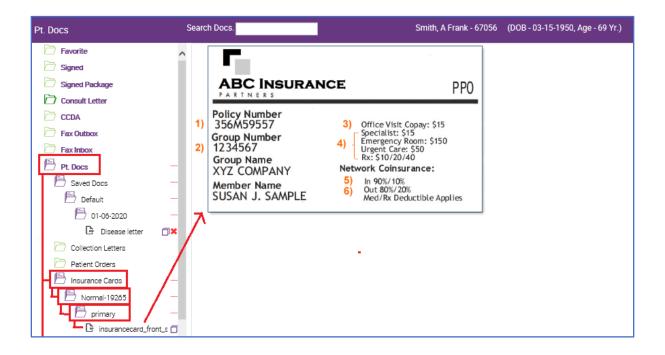
PRACTICE FI	LTER		
Start Date		End Date	UB04 Type
01-17-2020		01-17-2020	Print UB-04 🔻
Patient			
smith		Active	- Q



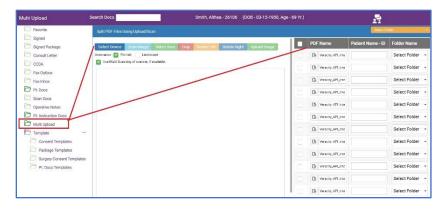
DOCUMENTS & DEMOGRAPHICS

Insurance Cards available under Docs (Demographics)

All patient Insurance cards scanned for Insurance would be visible in that order under the Pt Docs folder under Docs. This would be visible under Docs > Pt Docs > Insurance Cards > Case > Insurance type (Primary/Secondary/Tertiary) > Insurance Card.



Validate to allow only PDFs in multi-upload section (Documents)



The Multi Load folder automatically loads the Upload screen and it is defaulted now to only be PDFs.



When adding a new patient, the first letter is not capitalized (Demographics)

The system will now always capitalize the first letter of the: first name, middle name, last name, address 1, address 2

AR Worksheet (Accounting)

Access AR Worksheet (Accounting)

The system has a new module: AR Worksheet. This is accessed from the Main

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v module: AR Worksheet. This is accessed from Screen lower-left corner. (The \$\$ ICON)

Sample Summary Default View Display:

Insurance	0 - 30	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181+	Balance
AARP - AARP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,866.03	\$5,866.03
AET1 - Aetna	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$470.00	\$470.0
AETNA - Aetna	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,925.20	\$6,925.20
AETNA 3 - Aetna 3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,239.44	\$2,239.4
AET MC - Aetna Medicare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,583.30	\$6,583.3
MAILHANDLERS - Aetna MHBP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.23	\$130.23
AETNA SUP - Aetna Senior Supplemental Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,120.48	\$1,120.4
ALICARE - Alicare/Multiplan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.56	\$40.5
ALLIED BEN - Allied Benefit Systems	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.00	\$170.0
AMA - AMA Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.34	\$19.3
AMH - AmeriHealth	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,046.72	\$2,046.73
AMH9 - AmeriHealth	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,673.27	\$2,673.2
Amh Admin - AmeriHealth Administrators	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$80.00	\$80.0
AMH MG - Amerihealth Medigap Plans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.96	\$170.9
Avesis - AVESIS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,641.50	\$6,641.5
AXA Equitable - AXA Equitable	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$47.34	\$47.34
Bankers Fidelity - Bankers Fidelity	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27.77	\$27.77



AR Worksheet Filters

Facility		Provider		Insurance	ce Gro	oup
Select All	•	Select All	-	Select	All	•
Ins Company		Patient				
Select All	•			Active	-	Q
Aging By				As of		
Date of Serv	ice •	· .		Date	Ê	
Status		Ins. Types		Ins. Prio	rity	
Select All	•	Select All	•	Select	IIA I	•
Appt. Reason		Filter On		From		
Select All	•	Date of Se	ervi 👻	Date		
То		Print colum	ns in c	letail view	PDF	
Date		Select All		•		
ANALYTIC FIL	TER					
		A	ging T	ō		
Aging From		1000	181+			•
Aging From 00		-	1011			
		Balance To		Group B	у	
00		▼ Balance To		Group B Insura		•

Defined filters for the AR Worksheet – basic features. These are the default settings displayed for the AR Worksheet.

There is a checkbox **"More"** in the lower section which when checked will display additional filters for the AR Worksheet.

ADDITINAL	FILTE	RS		Image: 1	More		
Follow Up F	rom	Follow I	Јр То	Follow Up By	User		
Date		Date		Select All	•		
				Last Status			
				Please Sele	ec 🕶		
Rejection S	tatus	Rejectio	on Code	Show Task			
Please Se	elec 🕶	Selec	ct All 🔹 Please Selec				
What User(s)?	Print Sta	atement				
Select All	-	Status					
		Pleas	e Selec 🕶				
First Staten	nent Fr	om	First Sta	tement To			
Date		-	Date		=		
Last Staten	nent Fr	om	Last Sta	tement To			
Date			Date				
Overdue Da	iys	From		То			
Please Se	elec 🕶	5		10			
Proc/CPT (Code			Patient AS			
Select All			•	Please Sele	ec 🔺		
Statement	Count F	rom	Stateme	nt Count To			
5			10				



AR Module Filter Definitions

Practice Filters - Field Definitions

Facility = default is **ALL**. This represents all the locations where services are provided by the clinic.

Provider = default is **ALL**. This represents the doctor who provided the services for a given visit.

Insurance Group = default is **ALL.** This represents all the different insurance company types i.e, Medicare, Medicaid, Commercial, etc. defined within the system who cover patient services.

Insurance Company = default is **ALL**. This represents the specific plan within a group. **Patien**t = list of all patients who received services

Aging By: = this represents how the receivables are presented.

****Drop Down Options** = Date of Service / First Claim Date / Last Claim Date. **As of:** = defined date as to when the report was run and presented.

Status (blue field) = a tag creating some category of claims status

**** Drop Down Options** = 1st Appeal / 2nd Appeal / Credentialing Issue / In collections / Under paid.

Ins. Priority = this represents the order and/or hierarchy of various insurances.

**** Drop Down Options** = Primary / Secondary / Tertiary / Primary + Secondary. **Appointment Type** = this would come directly from the Scheduler allowing you to filter on different visit types, and manage and view the AR for those specific visit types, i.e. New Patient / Surgery, etc.

Filter On: = will filter on the defined meaning of the different options.

**** Drop Down Options** = Date of Service / First Claim Date / Last Claim Date **FROM / TO:** = allows you to select a date range for the "Filter On" field option. **Analytic Filter**

Range: = free type fields to define additional timeframes for report presentation 60 / 90 / 120 /180/ etc.

FROM / TO: = allows you to enter a dollar amount and range for example – "writeoff" this range from \$1.00 to \$3.00.

Hide 30 = if the checkbox is checked then the report will NOT show you those balances within 30 days due.

Group By: = allows you to define how you want the values to be defined based on one of the options.

** **Drop Down Options** = Insurance / Patient / Provider / Location /

Additional Filters

More: = this checkbox extends the options for filter choice and will display a new selection area.



Follow Up – From / To: = Reminder date based on action previously taken i.e. follow up by July 29 - so you can filter based on specific predefined note dates.

By (User): = If a specific name is selected - then the filter will only show those items which are assigned to you and are displayed for you to work on.

Last Status: = this simply defines the line items either pending or completed/done.

****Options** = Pending / Done.

Rejection Only: = line item status indicates the current claims submission status.

****Options** = Pending / Done / Both.

Rejection Code: = predefined in the system are different denial/rejection codes which can be filtered.

Show Tasks: = these are the designated options for determining who will do the work based on the assignment – for example an administrator can divide the list up and task it to multiple individuals to work down.

****Drop Down Options = Assigned / Unassigned

What User(s): = this allows you to select someone from the team to work either the assigned or unassigned claims. If option is set, then you can see the list of open items for a specific person.

Print Statement Status: = this is a field/flag set in the patient demographic area which indicated whether you want a statement printed Y/N for this patient.

First Statement Date: = range to be user established based on when statements were first created.

Last Statement Date: = range to be user established based on when statements were last created.

Overdue Days: = this is an action predefined by the rules set it represents the number of days allowed before payment is made.

******Drop Down Options** = Payment Days / Claim Filing Days.

From / To: = user defined to show the number of days you wish to filter i.e. 5 to 10 days overdue for example.

Proc. Code: = this is the list of all CPT procedure codes which allows you to display just specific services or service office visit types.

Patient As: = defined in the system already and works off the "Pt. As" field area on the demographic screen.

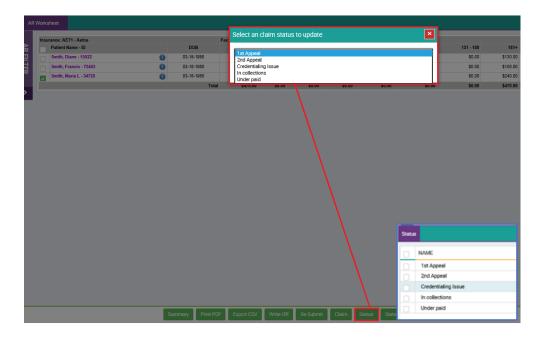
******Drop Down Options** = Charity / VIP / Workers Comp / Employee / etc. Statement Count From / To: =



AR Worksheet BUTTON definitions and functions

Status – Status defines the Claim status.

This is only available as part of the Detailed view on AR Smartsheet. Claim status is completely user defined, one can add/edit/remove Claim Status from **Settings > Billing > Claim Status**.



Claim Button -> This button is available on the Detail view of AR smartsheet

and allows the user to print CMS1500/ UB04 form for the selected claims. Users will need to go to Detail view of the AR Smartsheet > select the

Insurance/Provider/Facility > Patient > Select the encounters they want to Print > Claim > Select which form to Print > Yes > All paper claims will be created in one selection.



Work	sheet																								
Inco	rance: ALICARE - Alicare	Metholan							Exy: 05	88-624-6254								Tel.							
	Patient Name - ID	DOB	DOS	Facility	Provider	Ins. Type	Ins. ID	DOC		ICD10		R Ch	arge 0-:	10 31 - 6	0 61 - 94	91 - 120			181+	Balance	CFD F	PD Prt Pt S	t 1st Claim	Note/Date	Case Type
	Smith, Mary - 19896 🕧	03-15-1950										\$20	12.80 \$0.0	10 \$0.0	0 \$0.00	\$0.00	\$0.00	\$0.00	\$40.58	\$40.58	0	0 Y			
-			11-27-2018	Toms River	BT					H02.423, H28.492, H35.383, H04.12							\$0.00			\$27.77			11-27-201	8	Normal
•						Sec		11-27-2018	82250	H35.383						\$0.00	\$0.00			\$12.79					
_											To	tal \$20	12.80 \$0.0	10 \$0.0	0 \$0.0	\$0.00	\$0.00	\$0.00	\$40.56	\$40.58					
							IMEDIC	CWARE																	
							Are you	u sure to p	rint on	nly selected records?						1									
							CN	/IS 1500		O CMS 1500 - Red Form	O UE	1-04	01	JB-04 -	Red Fo	m									
										YES	NO														
				s	ummary	Print	PDF E	xport CSV	Write	ite Off Re-Submit Clain	n Stati	15	Statema	ent	Assign	lo Po	llow Up	Lette	a.						

The action will automatically refresh the displayed sheet to represent the action taken or implied.

Re-Submit -> This action button is available only on the detail view of AR

Smartsheet and allows the user to re-submit electronically the selected claims/line items. Users will need to go to the Detail view of the AR Smartsheet > select the Insurance/Provider/Facility > Patient > Select the encounters/lines they want to Re-submit > Re-submit > If a claim has more number of lines and only a few out of those are selected the system would show a confirmation pop-up before re-submitting > If the User still wishes to bill only what is selected, then they can select "Yes", otherwise "No" and go back to select the remaining lines.

	ance: AETNA 3 - Aetna 3									Fax: 8	00-736-9369								Tel.							
	Patient Name - ID		DOB	DOS	Facility	Provider	Ins. Type	Ins. ID	DOC	CPT	ICD10	R	Charge 0	- 30	31 - 60 61	1 - 90 9	91 - 120			181+	Balance	CFD F	PD Prt P	t St 1st	Claim Note/D	ate Ca
	Smith, Ann - 75717	0	03-15-1950										\$170.00 \$0	0.00	\$0.00 \$	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00	\$110.00	0	0 Y			
	Smith, Douglas T - 76396	0	03-15-1950										\$205.00 \$0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$195.00	\$195.00	0	0 Y			
	Smith, Elisabeth W - 7578	6 👩	03-15-1950										\$525.00 \$0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$515.00	\$515.00	0	0 Y			
				12-14-2018	Toms River	BT	Pri	123456789	12-14-2018	92012	H25.012, H40.1422, H40.1111	Y	\$100.00 \$0	0.00	\$0.00 \$	\$0.00	\$0.00	\$0.00	\$0.00	\$90.00	\$90.00			12-14	-2018	Nor
Ě							Pri		12-14-2018	92250	H40.1422, H40.1111	Y	\$100.00 \$0	0.00	\$0.00 \$	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00					
				11-22-2018	Toms River	BT	Pri	123456789	11-28-2018	92012	T15.12XA, S05.02XA	Y	\$100.00 \$0	0.00	\$0.00 \$	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$100.00			11-26	-2018	Nor
							Pri		11-28-2018	65210	T15.12XA	Y	\$225.00 \$0	0.00	\$0.00 \$	50.00	\$0.00	\$0.00	\$0.00	\$225.00	\$225.00					
	Smith, Elizabeth - 76741	0	03-15-1950					_		_			\$125.00 \$0	0.00	\$0.00 \$	50.00	\$0.00	\$0.00	\$0.00	\$125.00	\$125.00	0	0 Y		_	
	Smith, Janis - 73221	a	03-15-1950										\$138.87 \$0	0.00	\$0.00 \$	\$0.00	\$0.00	\$0.00	\$0.00	\$27.77	\$27.77	0	0 Y			
	Smith, Joanne - 75496	a	03-15-1950						IEDICWA	25					×		\$0.00	\$0.00	\$0.00	\$19.34	\$19.34	0	0 Y			
	Smith, Judy - 75623	a	03-15-1950						IEDICWA	КЕ					Ľ	00	\$0.00	\$0.00	\$0.00	\$500.00	\$500.00	0	0 Y			
	Smith, Katherine - 76858	~	03-15-1950					T	nere are m	nore pr	ocedures in the encounte	er (4	03815) Ar	re vo	u sure	00	\$0.00	\$0.00	\$0.00							
	Smith, Ronald A - 67977		03-15-1950								selected records?					00	\$0.00	\$0.00	\$0.00		\$147.33					
	Smith, Vernon - 76666	~	03-15-1950													00	\$0.00	\$0.00	\$0.00		\$270.00					
	Smith, Wanda F - 29641	-	03-15-1950					_		- 1	YES	ю				.00	\$0.00	\$0.00		\$205.00						
			00 10 1000													- 00	\$0.00	\$0.00		\$2,239,44						

The action will also automatically REFRESH the displayed sheet to represent the action taken or implied.



Statement - Option available in "DETAIL" screen view only. If the user wishes to create a "Statement" for multiple accounts in a single action, they can use this button to do so at a single go. The user first checks the line items to be included in the statement merge > Once the selection of the line items is made on the displayed sheet the user would select the link "Statement">> Statements would print for the items forcefully for those which do not have the balance in Patient Bucket if selected. For others it would print as usual.

urance: AETNA 3 - Aetna 3			Fax: 800-736-9	🥖 eclimedicware.com 🛛 🗙 📑
Patient Name - ID		DOB	С	
Smith, Ann - 75717	0	03-15-1950	\$1	
Smith, Douglas T - 76396	0	03-15-1950	\$2	
Smith, Elisabeth W - 75786	0	03-15-1950	\$5	STATEMENT
Smith, Elizabeth - 76741	0	03-15-1950	\$1	1st Request
Smith, Janis - 73221	0	03-15-1950	\$1	iMedicWare Test Practice IF PAYING BY CREDIT CARD, FILL OUT BELOW
Smith, Joanne - 75496	0	03-15-1950	\$	1405 Route 18 S, Suite #206 Suite 206 CHECK CARD USING FOR PAYMENT
Smith, Judy - 75623	0	03-15-1950	\$5	Toms River, NJ 08755 MASTER CARD 749A
Smith, Katherine - 76858	0	03-15-1950	\$1	(P) 732 - 817 - 9475 Content Amount: (F) SIGNATURE: EXP. DATE:
Smith, Ronald A - 67977	0	03-15-1950	\$7	STATEMENT DATE PAY THIS AMOUNT ACCOUNT MRN
Smith, Vernon - 76666	0	03-15-1950	\$2	01-22-2020 \$125.00 76858
Smith, Wanda F - 29641	0	03-15-1950	\$2	ADDRESSEE: REMIT TO: SHOW AMOUNT
		Total	\$3,0	Katherine Smith PAID HERE \$
				Old Bridge, NJ 08857 1405 Route 18 S, Suite #206 Suite 206 Toms River, NJ 08755
				PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT
				Date CPT Description Units T. Charges Ins Paid Adj Pt Paid Balance 12-18-18 92002 Ophth. intermed new Diagnosis: H00.021 1.00 \$125.00 \$125.00
				Date CPT Description Units T. Charges Ins Paid Adj Pt Paid Balance 12-18-18 92002 Ophth. intermed new Diagnosis: H00.021 1.00 \$125.00
				Date CPT Description Units T. Charges Ins Paid Adj Pt Paid Balance 12-18-18 92002 Ophth. intermed new Diagnosis: H00.021 1.00 \$125.00
				Date CPT Description Units T. Charges Ins Paid Adj Pt Paid Balance 12-18-18 92002 Ophth. intermed new Diagnosis: H00.021 1.00 \$125.00 \$125.00 \$125.00 TOTAL AMOUNT: 1 \$125.00 \$0.00 \$0.00 \$125.00
				Date CPT Description Units T. Charges Ins Paid Adj Pt Paid Balance 12-18-18 92002 Ophth. intermed new Diagnosis: H00.021 1.00 \$125.00

The action will also automatically REFRESH the displayed sheet to represent the action taken or implied.

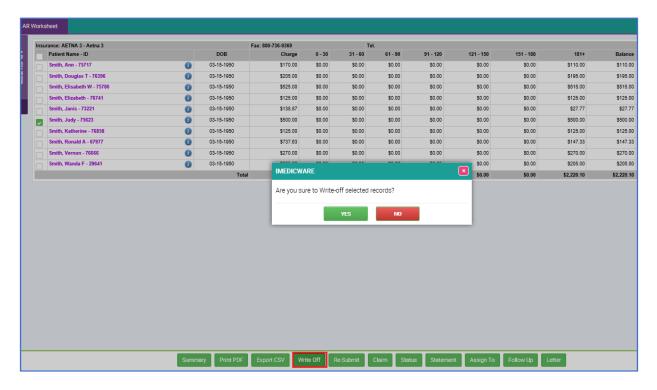


Assign To -> Option available in Detail view of AR Smartsheet. This button helps the user create a Task either for themselves or someone in the team, they can use this button to do so. Once in the Detail view > Select the Patient/Encounter > Select the Assign to button > Select from the drop down to whom they need to assign this as a task > Select Reminder date > Add Note > Save.

		_	Assign To				×		
nsurance: AETNA 3 - Aetna 3			ASSIGN TO						
Patient Name - ID		DOB	Assign as a Notes/	Task for :	Reminder Date	:		151 - 180	
Smith, Ann - 75717	0	03-15-1950	Helpdesk, IMW		· 01-22-2020		=	\$0.00	s
Smith, Douglas T - 76396	0	03-15-1950	Note :					\$0.00	S
Smith, Elisabeth W - 75786	0	03-15-1950	This is a test note	for Assign-To				\$0.00	S
Smith, Elizabeth - 76741	0	03-15-1950		<u> </u>				\$0.00	S
Smith, Janis - 73221	0	03-15-1950						\$0.00	
Smith, Joanne - 75496	0	03-15-1950				Save	Close	\$0.00	:
Smith, Judy - 75623	0	03-15-1950	\$200.00	4				\$0.00	S
Smith, Katherine - 76858	0	03-15-1950	\$125.00	\$0.00 \$0.	0 \$0.00	\$0.00	\$0.00	\$0.00	S
Smith, Ronald A - 67977	0	03-15-1950	\$737.63	\$0.00 \$0.	0 \$0.00	\$0.00	\$0.00	\$0.00	s
Smith, Vernon - 76666	0	03-15-1950	\$270.00	\$0.00 \$0.	0 \$0.00	\$0.00	\$0.00	\$0.00	S
Smith, Wanda F - 29641	0	03-15-1950	\$205.00	\$0.00 \$0.	\$0.00	\$0.00	\$0.00	\$0.00	s
		Tetel	40.000.00			\$0.00	44.44	\$0.00	\$2,
		Total	\$3,098.22	\$0.00 Sù	10 \$0.00	\$0.00	\$0.00	50.00	
		1008	53,055.22	50.00 SG	0 20.00	20.00	50.00	20.00	

EYE CARE LEADE S R

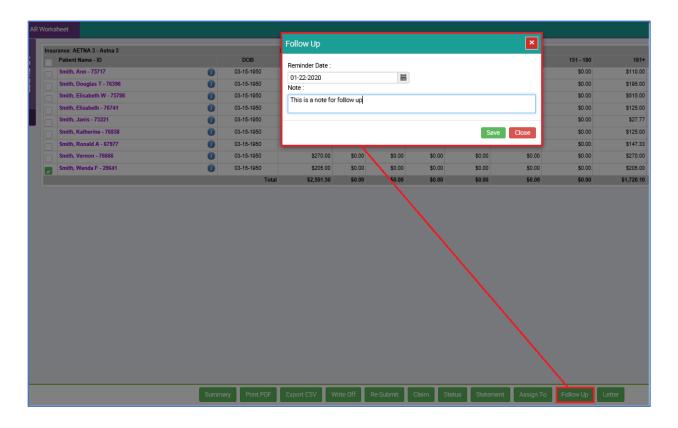
Write – off -> This is an action button available on the Detail screen and can be used to write-off the balances on selected lines/encounters/patient balances at a go. On Detail view > Select the Encounters/lines which need to be written off > Select Write-Off > Confirm.



DOS : 11 E.Id : 40	-28-2018 1297	Group Nam	e: iMedicWare T	est Practice	ins. Case Normal	Primary AETN/\$0.00		Credit to other En	counter	Auth#: Auth Am	ount: \$0.00		Statem Billing Pro			Active	
Apply	СРТ	Dx Code	T. Charges	Allowed	Deductible	Pri Amt	Patient Amt	Method	CC / Ch.#	Paid	Balance	DOR	DOT	Adj	Credit	Code	
	66821	H26.491	\$ 500.00	\$ 500.00	\$ 0.00	\$	\$	•		\$0.00	\$0.00	01-22-2020		\$500.00	\$0.00	Nothin -	
						\$ 0.00	\$ 0.00	Toms River +	Comment								
/ X		Write Off : Pa	tient									01-22-20	01-22-20	\$500.00			
	Tot	al Payments	\$500.00	\$500.00	\$0.00	\$0.00	\$0.00			\$0.00	\$0.00						
																	_
int.	/Ext.	Notes Date	Rer	ninder Date	Task Fo	r 🛛			Note	s				De	one	Operator	



Follow-up -> Option available in Detail view of AR Smartsheet. This button helps the user create a Task for themselves, they can use this button to do so. Once in the Detail view > Select the Patient/Encounter > Select the Follow-up button > Select Reminder date > Add Note > Save > The Task would be seen under User Console > Tasks.





Letter -> This action button is available only on the Detail view of the AR

Smartsheet. In case the user wishes to create a letter, they can do so for multiple patients at a go by selecting this button. In Detail View > Select the Patient/ Encounter > Hit Letter > Select template from drop down > Select the Action (Print/fax/Email) and the receiving party (Insurance/Patient) > Send.

				Send Letter	
Insu	irance: AETNA 3 - Aetna 3 Patient Name - ID		DOB	151 - 180	
	Smith, Ann - 75717	0	03-15-1950	Letter Template: \$0.00	\$1
	Smith, Douglas T - 76396	0	03-15-1950	Please Select	\$1
	Smith, Elisabeth W - 75786	0	03-15-1950	Type: To: 50.00	\$5
	Smith, Elizabeth - 76741	0	03-15-1950	Email Fax Print Insurance Patient	\$1
	Smith, Janis - 73221	0	03-15-1950	\$0.00	s
	Smith, Katherine - 76858	0	03-15-1950	Send Close \$0.00	\$1
	Smith, Ronald A - 67977	0	03-15-1950	\$0.00 S0.00	\$1
	Smith, Vernon - 76666	0	03-15-1950	\$270.00 \$0.00 \$0.00 \$0.00 \$0.00	\$2
~	Smith, Wanda F - 29641	0	03-15-1950	\$205.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$2
Ľ			Total	\$2,501.50 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00	\$1,7
				\sim	

Note: Only the templates under Settings > Document > Collection, will populate under the drop down.



Print PDF button -> This action button is available on both the Summary and Detail view and allows the user to print the list in a PDF format.

Insurance									
Insurance AARP - AARP		/imwdev_spri	int/library/htn	nl_to_pdf_rep	o - ≙ C	Search		, م	슈☆
AFT1 - Aetna	<pre>eclimedicware.com × []</pre>								
AETNA - Aetna	eclimedicware.com ×								
AFTNA 3 - Aetna 3									
AFT MC - Aetna Medicare	Insurance	0 - 30	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181+	Bata
MAILHANDLERS - Aetna MHBP	AARP - AARP AET1 - Aetna	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$5,866.03 \$470.00	\$5,866 \$470
AETNA SUP - Aetna Senior Supplemental Insurance	AETNA - Aetha	50.00	\$0.00	\$0.00	\$0.00	50.00	\$0.00	\$470.00	\$4/0
ALICARE - Alicare/Multiplan	AETNA 3 - Aetna 3	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,720.10	\$1,720
ALICARE - Alicatemulopian ALLIED BEN - Allied Benefit Systems	AET MC - Aetna Medicare MAILHANDLERS - Aetna MHEP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00 \$0.00	\$6,583.30	\$6,583
	AETNA SUP - Aetna Senior Supplemental Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,120.48	\$1,120
AMA - AMA Insurance	ALICARE - Alicare/Multiplan ALLIED BEN - Alled Beneft Systems	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$40.55	\$40 \$170
AMH - AmeriHealth	AWA - AWA Insurance	50.00	\$0.00	50.00	\$0.00	\$0.00	50.00	\$19.34	\$19
AMH9 - AmeriHealth	AMH - AmeriHeath	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,046.72	\$2,046
Amh Admin - AmeriHealth Administrators	AMH9 - AmeriHealth Amh Admin - AmeriHealth Administrators	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,673.27	\$2,67
AMH MG - Amerihealth Medigap Plans	AMH MG - Ameriheath Medigap Plans	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.96	\$17
Avesis - AVESIS	Avesis - AVESIS AXA Egutable - AXA Egutable	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$6,641.50 \$47.34	\$6,641 \$47
AXA Equitable - AXA Equitable	Bankers Fidelity - Bankers Fidelity	50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27.77	527
Bankers Fidelity - Bankers Fidelity	BANKERS - Bankers Life & Casualty	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$619.85	\$619
BANKERS - Bankers Life & Casualty	BANKERS2 - Bankers Life & Casualty Co BRICKLAYERS - Bricklayers	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$186.48 \$63.13	\$186
BANKER \$2 - Bankers Life & Casualty Co	Bridgestone - Bridgestone Claims Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$46.47	\$46
BRICKLAYERS - Bricklavers	CENTURY - Century Healthcare CHAMPVA - Champva	\$0.00 \$0.00	\$0.00	\$0.00	\$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$125.00	\$121 \$481
Bridgestone - Bridgestone Claims Services	CIG4 - Cigna	50.00	\$0.00	\$0.00	\$0.00	50.00	\$0.00	\$469.30	\$48
CENTURY - Century Healthcare	CIG - Cigna	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$859.65	\$85
CHAMPVA - Champva	CIG5 - Cigna CIG2 - Cigna 2	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$103.67	\$103 \$436
	Clig6 - Cigna 6	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,030.00	\$1,03
CIG4 - Cigna	CIG7 - Cigna7	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$248.00 \$100.00	\$24I \$10I
CIG - Cigna	CIG8 - Cigna8 DAVIS - Davis Vision	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$100.00 \$21.874.77	\$10i \$21,87i
CIG5 - Cigna	ENBLEMH - Emblem Health	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$230.21	\$23
CIG2 - Cigna 2	EMBLEMH2 - Emblem Heath HIP Prime PPO EMP6 - Empire bcbs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$100
CIG6 - Cigna 6	EMP UHC - Empire-UHC	50.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$487.57	\$45
CIG7 - Cigna7	EyeMed - EyeMed PDF Print o		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,250.81	\$8,25
CIG8 - Cigna8	GALLAGHER - Gallagher Bassett Summary GENWORTH - Genworth	3.00	\$0.00	\$0.00	\$0.00	\$0.00 \$0.00	\$0.00 \$0.00	\$330.00 \$76.67	\$330
DAVIS - Davis Vision	GERBER - Gerber Life Ins Co	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25.21	\$25
EMBLEMH - Emblem Health	GHI2-GHI GHI-GHI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$107.63	\$107 \$2,208
EMBLEMH2 - Emblem Health HIP Prime PPO	GOOD DAYS - Good Days from CDP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$825.22	\$825
EMP8 - Empire bobs	GUARDIAN - Guardian	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$385.00	\$385
EMP LINC - Empire LINC	HENT - HealthNet	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$96.72	\$96

Export CSV -> This action button is available on both the Summary and Detail view and allows the user to export the list in CSV format.

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AMM MG-Amerikawa Medigap Plans 4 AET1 - Aetr Avaris - AVEES 5 AETNA - Ae AXA Equitable - AAA Equitable 6 AETNA - Ae Bankers Fidelity - Bankers Fidelity 7 AETMC - A BANKERS - Bankers Life & Casually BANKERS - Bankers Life & Casually BANKERS - Bankers Life & Casually BANKERS - Bankers Life & Casually AETNA SU				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,866.03	\$5,866.03		
Aversis - AVE Size State Medgeps - AVE 5 A ETINA - A eX AVXA Explicable - AXA Equitable 6 A ETINA 3 - J Balances - Fidels - State Size 7 A ETING - AX DAMKERS - Bashares - Life & Scauably 7 A ETING - AX DAMKERS - Bashares - Life & Scauably 8 MALILHA AND BAMKERS3 - Bashares - Life & Scauably 9 A ETINA SUP			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$470.00	\$470.00		
AXA Equilable - AXA Equilable G AETNA 3 - A Bankers Fidelity Bankers Fidelity 7 AET MC - A DANKERS - Bankers Life & Casualty 0 B BANKERS - BANKERS - B BANKERS - B	zula		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$6.925.20		
Bankers Fidelity - Bankers Fidelity 7 AET MA S-A DANKERS - Bankers Life & Casualty 7 AET MA C- A BANKERS - Bankers Life & Casualty Co 8 MAILHAND BRICKLAYERS - Bricklayers 9 AETNA SUP												
BANKERS - Bankers Life & Casuality 7 AET MC - Ar BANKERS - Bankers Life & Casuality Co 8 MAILHAND BRICKLAYERS - Bricklayers 9 AETNA SUP			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$1,720.10		
BANKERS2 - Bankers Life & Casualty Co 8 MAILHAND BRICKLAYERS - Bricklayers 9 AETNA SUP	etna Medicare		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,583.30	\$6,583.30		
BRICKLAYERS - Bricklayers 9 AETNA SUP	LERS - Aetna MHBP		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$130.23	\$130.23		
	- Aetna Senior Supplemental	Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1 120 48	\$1.120.48		
	Alicare/Multiplan		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.56	\$40.56		
CENTURY Control Healtheare												
CHAMPVA - Champva 11 ALLIED BEN	I - Allied Benefit Systems		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$170.00	\$170.00		
CIG4 - Cigna 12 AMA - AMA	A Insurance		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.34	\$19.34		
CIG - Cigna	11						-			1.		_
CIGS - Cigna	ar_worksheet_1579688761	(+)					4					
CIG2 - Cigna 2								Ħ	E (E)	四		+ 10
CIG6 - Cigna 6	\$0.00	30.00	4	.00	30.00		30.00		0.00	\$1,030.00	-	\$1,030
CIG7 - Cigna7	\$0.00	\$0.00	\$.00	\$0.00		\$0.00	s	0.00	\$248.00		\$248
CIG8 - Cigna8	\$0.00	\$0.00	50	.00	\$0.00		\$0.00	\$	0.00	\$100.00		\$100
DAVIS - Davis Vision	\$0.00	\$0.00	31	.00	\$0.00		\$0.00	S	0.00	\$21,874.77		\$21,874
EMBLEMH - Emblem Health	\$0.00	\$0.00		.00	\$0.00		\$0.00		0.00	\$230.21		\$230
EMBLEMH2 - Emblem Health HIP Prime PPO	\$0.00	\$0.00		.00	\$0.00		\$0.00		0.00	\$100.00		\$100
EMP8 - Empire bobs	\$0.00	\$0.00		.00	\$0.00		\$0.00		0.00	\$211.64		\$211
EMP (IHC - EmpireJIHC	\$0.00	\$0.00		00	\$0.00		\$0.00	•	0.00	\$497.57		\$493

Claim Filing Days (CFD) Column -> This is standard for most insurance contracts to have defined the number of days you have as a practice to submit a claim. It is important and helpful for the user to understand the disposition of an account or claim as they are managing the AR. This can be setup for individual Insurances by going to Settings > Billing > Insurances.

Edit Record				×
COMPANY	CONTACT	MAILING	IDS	MORE INFO
Company Name	Contact Name	Phone	Practice Group ID	Fee Table Status
Aetna Medicare		8006240756	2300273	Medicare * Active *
Practice Code Insurance Group	Street	Fax	Institutional Group ID	State Payer Ins. Type
AET MC -Select- *	PO Box 981107			• •
Primary Secondary Claim type		Email Co-Ins Collect	Receiver ID	Description
Electronics + Electronics + Emdeon +				0
Accept/No Accept Assignment Institutional Type	Zip Code City State	Payer ID Payer ID Payer ID	Submitter ID	🗌 FD 🔄 Billing 🛃 RTE
Accept Assignment * 837i *	ZID Code City State 79998 El Paso TX	(Inst.) (Pro.) (RTE)	60054	Send NDC Pre-Auth
Claim Filing Days (CFD) Payment Due Days (PD)	79998 EI P850 IX	60054 60054 00002	Capitation Policies CPT Alert	ICD Code MSP Type
0			Capitation CPT Alert	· · ·
Direct Billing Collect tests Copay Referral Required				
	Saw	-		Close

Payment Due Days Column -> Medicare has a 15-day mandatory claim payment timeframe. Having this displayed in the spreadsheet immediately gives the user the ability to see and understand and compare where they are with respect to any given claim and if Medicare is performing according to their timeframe. To set this for any insurance as the user wishes, go to Settings > Billing > Insurances.

Edit Record	ан алан алан ал			×
COMPANY	CONTACT	MAILING	IDS	MORE INFO
Company Name Aetna Medicare	Contact Name	Phone 8006240756	Practice Group ID 2300273	Fee Table Status Medicare
Practice Code Insurance Group AET MC ·Select· ·	Street P0 Box 981107	Fax	Institutional Group ID	State Payer Ins. Type
Primary Secondary Claim type Electronics • Electronics • Emdeon •		Email Co-Ins Collect	Receiver ID	Description
Accept/No Accept Assignment Institutional Type Accept Assignment	Zip Code City State	Payer ID Payer ID Payer ID (Inst.) (Pro.) (RTE)	Submitter ID 60054	FD Billing RTE Send NDC Pre-Auth
Claim Filing Days (CFD) Payment Due Days (PD)	79998 El Paso TX	60054 60054 00002	Capitation Policies CPT Alert	ICD Code MSP Type
0 Direct Billing Collect tests Copay Referral Required			Capitation CPT Alert	
	Saw			Close

Reject (R) Column -> this will show a Y represented as data in the column. The **Y** comes in two (2) colors – BLACK Y means the claim is done – either not rejected or rejection was reworked. RED Y indicates the there was a rejection and the rejection to the claim is still open.

	rance: AETNA SUP									88-624-6290	_							Tel.							
	Patient Name - ID	DOB	DOS	Facility	Provider	Ins. Type	Ins. ID	DOC	CPT	ICD10	R	Charge	0 - 30	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181+	Balance	CFD	PD Prt	Pt 1st Claim	Note/Date	1
	Smith, Andrea - 73706	03-15-1950										\$202.80	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$40.56	\$40.56	0	0 Y			
			11-19-2018	Toms River	BT	Sec	123456789	11-19-2018		H40.013, H04.123, H43.813, H35.413	Y	\$138.87	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$27.77	\$27.77			11-20-2018	Corrected claim. Procedure 92250 omitted by error on original claim	Norm
						Sec		11-20-2018	92250	H40.013	Y	\$63.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$12.79	\$12.79					
	Smith, Barbara A 10031	- 03-15-1950										\$96.72	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19.34	\$19.34	0	0 Y			
-		•																						1	
										ΥΕ <		1				(•	Λ	- 0	D	C				
																	• 1				L				

ASC Surgery Center

Facility codes will populate for Institutional Claim and Surgeon codes will populate I Professional claims (ASC)

			Admin +				Audit -			
							Procedures			
	View By :	Nothing sele	ected -		Sort By :	Category	•	Fiter :		Q
(Category		Speciality		Procedure		Code	Surgeon	Facility	Labor Cost
	Anesthesia	•	Nothing selected	•	Anesthesia for V	Vitreoretinal	00145			0.00
	Anesthesia	•	Nothing selected	•	Anesthesia Ser	vices	000000			0.00
	G-Codes	•	Nothing selected	•	ASC QR- Fall in	ASC facility	G8910			0.00
	G-Codes	•	Nothing selected	•	ASC QR-IV Prop	hylaxis antibiotic intiated	G8916			0.00
	G-Codes	•	Nothing selected	•	ASC QR-IV Prop	hylaxis antibiotic not initiated or	G8917	G8917		0.00
	G-Codes	-	Nothing selected	-	ASC QR-No pre	operative order for IV Prophyla>	G8918			0.00

- Login to ASCEMR and set this up under Admin > Preferences > Procedures
- In the scheduler screen, select the patient to Check-In.
- After the patient is Checked-In, select the patient to open its chart.
- In Today's Visit, Open the chart of Discharge Summary.
- Select CPT codes (like at-least one CPT for facility or at-least one CPT for surgeon or at-least one CPT for facility and surgeon both or at-least one facility for Anesthesia).



Today's Visit				Discharge Summary Sheet
Patient Name	Doe, IMW - 1		Address	Fake Appt No
DOB	08-14-1993		Age	26 years
Surgery Date	08-05-2019		Sex	Male
Surgeon	Surgeon John Te	st	Anesthesia Provider	
Base Line Vital Signs	B/P	Р	R	O2SAT
67924		Repair of Entropion		
Cash Pay		Cash Pay		
Retina				~
67036		Pars Plana Vitrectomy		
67043		PPV Membrane Peel, PRP, Gas	s/Oil	
Comments				
Discharge Summary (Sur	geon)			~
G8917 1	Dx Codes	•	Mod1 Mod2 Mod3	8
Discharge Summary (Fac	ility)			^
Discharge Summary (Ane	sthesia)			^
I certify that the diagn	osis and procedures per	formed are accurate and	complete to the best of	my knowledge .

- Select Dx codes and sign as surgeon.
- Save the chart to complete it with green flag.
- Now go to iMedicWare and open the same patient (as saved in ASCEMR)
- Select Accounting->Unprocessed Superbill



• Here the Facility code should appear for facility/institution only, the surgeon/practice code should appear for surgeon only and anesthesia code should appear for anesthesia only.

iMedicWare Te 🕶	Professional 👻								Se	lf Pay	
Billing Provider		Credited Provider			Ref. Physic	ian		NR	Ref	erral #	(
Test, Surgeon	-	Test, Surgeon		•						•	
Pri. Ins		Sec. ins			Ter. Ins				Pri.	CoPay	
									\$	0.00	
Onset Date		Start Time	End Time		Duration (r	nin)	Units			arges	1
					0		0		\$	100.00	
DX1 D	X2	DX3	DX4		DX5		DX6		DX7		
Self Pay	Procedure	Dx Cor	les	Mod	1 Mod2	Mod3	Unit	Charges	5	Net Amt	

Note: Please reach out to the Services Team to have this available for your Practice.

Anesthesia Start and stop time (ASC)

Anesthesia start and stop time recorded in the General Anesthesia record in ASC EMR will come over to Service Charges for Anesthesia charge. The user would not have to fill this manually anymore.

				General Anesthesia Record	Service Charges							Ω	oe, Alliance -	- 69865
Patient Name	Doe, Alliance - 47 / 6985	5	Address	123 Fake Stre			-							
DOB	11-06-1968		Age	51 years	Groups	Claim type	DOS			Encounter				Ins. Case
Surgery Date	12-21-2019		Sex	Male	IMW Optical Bus *	Anesthesia •	12/21/2019			4616				Medical-2
Surgeon	Surgeon John Test		Anesthesia Provider	Anes Test	Billing Provider	· · · · · · · · · · · · · · · · · · ·	Credited Provider			Ref. Physic	ian		NR	Referral #
ase Line Vital Signs	B/P	Р	R	O ₂ SAT	Test, Surgeon John.		Test, Surgeon John.			Mrs. Test.	Surgeon Jol	ha		
					Pti. Ins		Sec. ins			Ter. Ins	-			Pri. CoPay
					BCBS CA									\$ 0.00
Patient Reassessed	Machine & Equipmen	Completed Anesthe	sia Class: 🗌 🖌		Onset Date		Start Time	End Time		Duration (r	min)	Units		T.Charges
		Completes Turrente								0		0.00		\$ 0.00
												DX6		
					DOC	DX2	DX3	DX4		DX5				DX7
Charle Times					H25.11	DX2 H25.81	DX3	DX4		DX5		DX6		DX7
Start Time 06:55 AM	P	220		++++		H25.81	Dx Codes		Wod1	DXS Mod2	Mod3	Unit	Charge	
	•	200			H25.11	H25.81 ay Procedure	Dx Codes		Wod1		Mod3		Charge	es
06:55 AM	•				H25.11	H25.81			Wod1		Mod3			
06:55 AM Stop Time		200			H25.11	H25.81 ay Procedure	Dx Codes		Wod1		Mod3		Charge	es
06:55 AM Stop Time 06:58 AM MAC		180			H25.11 Self P X	H25.81 ay Procedure	Dx Codes H25.11, H25.81	• 4	Wod1		Mod3		Charge \$ 0.00	es
06:55 AM Stop Time 06:58 AM MAC Miller		200	****		H25.11 Self P X	H25.81 ay Procedure	Dx Codes H25.11, H25.81	• 4	Wod1		Med3		Charge \$ 0.00	es
06:55 AM Stop Time 06:55 AM MAC Miller ET Tube		200	****		H25.11 Self P X	H25.81 ay Procedure	Dx Codes H25.11, H25.81	• 4	Wod1		Mod3		Charge \$ 0.00	es
06.55 AM Stop Time 06.58 AM MAC Miller ET Tube ✓		200			H25.11 Self P X	H25.81 ay Procedure	Dx Codes H25.11, H25.81	• 4	Wod1		Mod3		Charge \$ 0.00	es
06:55 AM Stop Time 06:55 AM MAC Miller ET Tube		200			H25.11 Self P X	H25.81 ay Procedure	Dx Codes H25.11, H25.81	• 4	Wod1		Mod3		Charge \$ 0.00	es

Adding disclaimer within Discharge Summary (ASC)

The system now has an added disclaimer indicating that the CRNA worked with the surgeon and is approved to do the work provided.



PT Codes	Unit	Dx Codes		Mod1	Mod2	Mod3	
8907	1	H25.11	•	RT	Mod2	Mod3	8
984	1	H25.11	•	RT	Mod2	Mod3	8
9447	1	H25.11	•	RT	Mod2	Mod3	8
e worked w ormed unde	diagnos ith and c r my sup r. Powe	is and procedures perforest servified that the anesthe ervision.			(54)		

Request to have ability to change timestamp of meds in MAC/Regional Section (ASC)

Under "Holding area through Intra-Op" edit icon added in front of each Medication name. This icon will be available only if the logged in user type is Anesthesiologist and the chart is not finalized. Select this edit icon a new popup will appear with existing values of dosage and date/time. Once the change is done, select "Save & Close".



Logged in Anes Te	st						iMedicWare Surgery Cer	nter	
						N	- /AC/Local/Regional Anesthesia	Record	
tient Name	Test, Stevie -	121 / 266	044		Addres	s	1244 Testing	Site	Righ
DB	03-04-2002				Age		17 years	Tel.	900-
rgery Date	01-31-2020				Sex		Female	Allergies	
rgeon	Surgeon Johr	Test			Anesth	esia Provider	Anes Test	Translator	
se Line Vital Signs	B/P			Ρ		R	O ₂ SAT	Temp	
Stable cardiovascular an	d Pulmonary function			Blood Sugar	Add/Edi	it Dosage - ds	·	Value	×
Plan regional anesthesia	with sedation.Risks,be	nefits and							-
All Questions Answered				ASA Physical Statu	Sr.	Dosage		Date/Time	
a			_	-	1	1	01/31/2020 05:14	56 AM	
Holding area through Int	ra-Op				2	2	01/31/2020 03:47:	01 PM	Ē
	05	Anes Start Tim	e	Anes Stop Time	3	5	01/31/2020 03:47:	07 PM	
	00	. 13 AM	_		4	-			
f					5				i l
ds	1	1 2	5		6			tit	
fd					7				ā I
Propofol mg	583				8				
Fentanyl mcg									
sf	ø				9			i	
f	1				10			i	1
fdf					11			til	
SaO ₂					12				ň
O ₂ I/m		5 5	5	5 5					-
	< [Save & Close Close		
EKG		ACING							

Op-Note Edits (ASC)

The system now allows you to change the privilege of a Super User to include the ability to edit Op-Notes. This can be done now by Super Users established in the iASC program.

Modifiers auto-populating in ASC for Cataract procedures (ASC)

The new change allows you to set up the system in a way to either always default a modifier or never display a modifier, letting the user have the ability to then select the designated modifier as they perform the documentation. Default is set to "NO Modifiers".

CPT Codes	Unit	Dx Codes		Mod1	Mod2	Mod3	
G8907	1	H25.12	٠	Mod1	Mod2	Mod3	
G8918	1	H25.12	•	Mod1	Mod2	Mod3	
66984F	1	H25.12	٠	Mod1	Mod2	Mod3	
C9447	1	H25.12	•	Modit	Mod2	Mod3	•

R

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LEADE

Post-op orders not presenting when you are in the Laser Procedure template. (ASC)

myCare /MeticNare	Test, Anes	iMedicWare	e Surgery Center	01/31/2020 05	me - doe 🧕	🖹 🛓 Switch User 📴 Logout	
		Admin -				Reports +	
LSC .	Settings	liters	Pre Op. Med Order	Surgeon Preference Card	Pre-Define	Op-Report	Instruct Sheet
lonsent Form	Ans. Preference Card	Power	Anes EKG	Procedure Supplies	Procedure Preference Car	d Injection/Misc.	Nurse Preference Card
		🕑 # of Shots					
		Total Energy		Millijoules(mJ)			
		Degree of opening					
		Exposure					
		Count					4
		Post-Op Orders					1
		Post-Op Orders		Test, Test1 Post-Op Orders	s Select Laser Procedure		
		Progress Report					
		Progress Report					
		Pre Op Medication Orders					8
		Pre Op Medication Orders		Medication	Strength	Direction	
				Phenyleprine	2.5%	1 gtt in operative eye on arri 🛛	
				Tropicamide	1%	1 gtt in operative eye	
				lopidine	0.5%	1 gtt in operative eye on arri 🔣	

Post-op Orders saved for Laser templates under Admin > Laser > Post-Op Orders



This would appear as follows in the Chart:

Logged in Anes Tes	t			iMedicWa	re Surgery Center		
Today's Visit				Las	er Procedure		
Patient Name DOB Surgery Date Surgeon	Doe, Grasso1985 - 4 / 08-12-1935 05-06-2019 Surgeon John Test	1	Address Age Sex Anesthesia Provider	123 Pake 3 84 years Male N/A	Stre	Site Tel. Allergies Translator	Left Eye A/ 732-039-8400 Pr St A
Base Line Vital Signs	B/P	Р	R	C	D ₂ SAT N/A	Temp N/A	Height N/A
Patient in satisfactory con	dition for proposed laser proce	dure					
PreLaser Vital Signs Laser Notes for left eye ► Power ► # of Shots ► Total Energy	BP	P	R TI	me		Family	Cother
PostI aser Vital Signs ▶ Post Op Order	RP Test, Test1 Post-Op Orde	P		ime	IOP Pressure Comments		R
Surgeon: Dr. Test, Surger Electronically Signed Yes Signature Date 05-08-20	s			₽	Nurse Signat	ure	

Post Op Aldrete – need two places to document Aldrete (ASC)

We created the ability to expand the number of recordings you can make for the Aldrete post-op score.

DOB Surgery Date	Test, Stevie - 121 / 266 03-04-2002	044	Address		Post-Op Aldrete								rms Help
DOB Surgery Date		044	Address										
	03-04-2002 Age te 01-31-2020 Sex				1244 Testing 17 years			Right Eye 900-777-23	323	A/D Pri. Procedure		act Extracti	Ø
Surgeon			Sex Anesthesia	Provider	Female Anes Test		Allergies Translator			Sec. Proc ASC	N/A 6266		ß
ase Line Vital Signs	B/P	P		R	05	SAT	Temp		Height		Weight	81	11
^0												· [0
Activity				Point(s) Ea	arned	Respiration						Point(s) Earned	
Able to move 4 extremities v Able to move 2 extremities v Able to move 0 extremities v	oluntarily on command			1 Point((5)		oreathe deeply and cou a or limited breathing	gh freely				1 Point(s)	
Consciousness				Point(s) Ea	arned	Circulation						Point(s) Earned	
Fully awake Arousable on calling Not responding				1 Point(.,		0% of preanesthetic lev 0% to 50% of preanesth 0% of preanesthetic lev	etic level				1 Point(s)	
Color				Point(s) Ea									
 Normal Pale, dusky, blotchy, jaundic Cyanotic 	ed, other cyanotic			1 Point((\$)	Total Point(s) Recorded by Ter	Earned st, Anes on 01-31-2020 (05:26 AM				5 Point(s)	
^ 2	User can add as ma	any reords											0
^ 3	as required												0
Activity				Point(s) Ea		Respiration						Point(s) Earned	
Able to move 4 extremities v	oluntarily on command			2 Point	its	Able to I	preathe deeply and cou	gh freely				1 Points	
III Finalize				🖺 Sav	re 🗙 Cancel	🕀 Print 🛛 🛱	Save & Print 🛛 🎟 Print	EMR					

LEADER

S

OPTICAL

Cost of Goods report functionality change (Optical)

The problem was with the calculations where the calculated cost of goods should be Retail Price + Sales Tax – Wholesale or Purchase price. The system is correct now and calculating the proper cost of good in the report.

ramanlal, H	Howard - 9020	04 A/C Sta	tus: Active	Imedicware Optical 0		ime	dicware ,	Admin R	toms river	Search
Demographics	Reports Cost of Good	ds Report								
> Point of Sale	Select All Operator (By	Contraction of the local distance of the loc	elect All	Select All Product Type All Status	۲	Monthly Date (By orde	r status chang	All Ord All/iPol		○ Summary ● Detail
> Billing	Cost of Goods Operator : All	Report	Report for Date : 01-01 Facility : All	2020 To 01-31-2020 Product Type : All		Created by A Status : All	l on 01-31-2020		port Type : Deta	ill
	Order #	Order Date	Patient Name - Id	Upc Code - Item Name	Wholesale	Retail	Amount	Ins. Resp.	Discount	Pat Paid
 Inventory 	274	01-15-20	Ramanlal Brett - 90205	10164428763 - On-Guard Safety Collection	\$23.99	\$71.97	\$71.97	\$0.00	\$0.00	\$0.00
Order Tracking				000002 - Custom Lens	\$0.00	\$160.00	\$1,072.50	\$0.00	\$0.00	\$0.00
				Sales Tax			\$221.70			\$0.00
Admin					\$23.99	\$231.97	\$1,366.17	\$0.00	\$0.00	\$0.00
© 0+-		04.45.00	141 C 11 00000	Lab	Cost : \$1,072.50	Frame	Cost : \$71.97	Net Pro	fit : <mark>\$1,342.18</mark>	

Make certain fields mandatory before attempting to create a Lab order (Optical) - "

	Frame Selection		(1-31-2020) 📰				Lens	Select	tion La	ast Exa	m: 09-	17-2019 P	hysician:				Ð
	UPC	000001		00	Q	ιu	IPC	0000	02					Item Name	Custom Lens				0, -
	Custom Item Name Manufacturer	Select		IMAGE NOT AVAILABLE			OU 🔻			OD						OS			
		Select				S	eg Type	Sing	le Vision			•		Seg Type	Single Vision			۳	
	Brand Color						esign [Plea	ise Select			•	•	Design	Please Sele	t		۲	
						N	/laterial	Plea	se Select			•		Material	Please Sele	:t		۲	
	Shape					Т	reatment	Sele	ct All			~		Treatment	Select All			~	
	Style	Select	o dio\//	oro															
	Temple		edicW	are								×			Lab Please S	elect		۲	
	Туре	Blog	co ontor	the follow	vina	or E	ame and Len			and 00				VA	A	DD	V	Ą	
	A	Cus	tom Lens	5	-	0111	ane and Len	3(63). 0000011					20/20			20/30		
	ED	Plea	se enter v	alue for A alue for E	3.									20/25 OC			20/2: Min Se		
	FPD	Plea		alue for E			dge. here, Cylinder	and	Axis)						Dase	cuive r	VIIII 30	sy ni	
	Order Ouse or	n har Plea	ise enter l		or OS	(Spt	nere, Cylinder										-	-	
	Safety Glasses	Plea	ise enter i	alue for C	DS (D	PD O	R NPD).						-00	e H52 4: H52	2.01; I 🔲 Neu	ralize ()ty	1	1.
	Qty on hand: 0													1102.4, 1102		Show m			
	ob Type Frame To C	ome										ок				51104411		ic tails	
	Item De	scription	Code	Unit Cos	st l	Jnit	T. Unit Cost	In	s. Resp	Disco	ount	Pt Pai	d	Pt Resp	Discount (🔻	Self Pay	T	Тах	
	Custom Frar Cus	stom Frame	V27909	\$ 0	.00	1	\$ 0.00	\$	0.00	\$	0.00	\$	0.00	\$ 0.00	Please Sel	Self Pay	۲		×
	OD Prism Diopter Cha	arges	V2520	\$ 50	.00	16.7	\$ 837.50	\$	0.00	\$	0.00	\$	0.00	\$ 837.50	Please Sel	Self Pay	۲		×
(OS Prism Diopter Cha	arges	V2520	\$ 50	.00	16	\$ 800.00	\$	0.00	\$	0.00	\$	0.00	\$ 800.00	Please Sel	Self Pay	۲		×
		9	Sub Total:	\$ 100	.00	33.7	\$ 1637.50	\$	0.00	\$	0.00	\$		\$ 1637.50					0
	Payment: \$0.00			Total Tax	1							\$	0.00	\$ 327.50					
	Adjustment: \$0.00				erall										Please Sel	·			
	Credit: \$0.00			Gr	and 1	fotal:	\$ 1965.00	\$	0.00	\$	0.00	\$	0.00	\$ 1965.00					
	Pt Balance: \$0.00			0	Comm	nent:									Due Dat	e:			
	100																		*

Fields for the completion of a Lab order are now made mandatory. You can not move to a Lab order or send it without having the mandatory fields filled out.



PORTAL

Users requested to NOT show a patient's contact lens info on the iPortal. (Portal)

Now a practice can set a switch to either include or exclude the patient information on the iPortal page. The image below has the settings turned on leaving it blank the portal would not display the information.

iPortal Settings		Mrs. Smi SpLake
DEFAULT AUTHORIZATION S	ETTINGS	
PATIENT DIRECT CREDENT		le iPortal Information 🗌 Evening Time Slot 🗹 Add Appoin ole Register New Patient 📄 Disable Request Appointment [/ Contact Lens
Direct Email	Direct Password	iPortal URL
imedicware@direct.datan	Password1	

To change this toggle, go to Settings > iPortal >iPortal Settings and change the "Show Contact Lens" field.

Portal message from patient to Provider/staff (iPortal)

If a patient sends out a message to the practice using the Portal the same would be seen with the correct time stamp. The system would read the actual time the message was received from Portal to the User on User Console.

MedicWar Smith, Last Login - 7 Jan, 2020 at Change Password	- 28633		🛗 Wed Feb	05th 2020 12:53:32 PM 🛛 🖸	Message 🖴 Pr	int 🛛 It Logout
 Home Demographics 	Practice Messages					
Appointment Medical Prescription	To Patient Coordinator Subject	Message			Send	∢ Message
Statements					O Inbox (Sent Message
 Messages & Clinical Data 1 Practice Messages Send Message [Transmit] Clinical Data [View & Download] 	SUBJECT Patient Test Msg subject Msg from Re Patient Test Msg body		DATE 02-05-2020 12:49 PM	Note the appointment time and date		
 PGHD Forms / Logs Educational Material 	Test Msg subject	DELETE	02-05-2020 12:44 PM			



The patient sent out a message to the Provider at 12:49 pm, same is visible as below:

Patient Messages		Sel	ect Facility +	Patient #	Search	New Message		Sent Messag	es Notifications	Print Message
Showing 1 to 2 of 2 record(s)		M 18 5				3	-17			
Smith, 28633 Patient Test Msg subject	02-05-2020 12:49 PM	2	Smith, - 28633 Gender : Male Address :	DOB :	Email :		App Seno Faci	der : Smit (Pat		
Smith, - 28633 Test Msg subject	02-05-2020 12:44 PM	Patient Tes	t Msg body							

The timestamp will appear the same when the Provider sends a reply also back to the patient from User Console.

Patient Messages		Se	elect Facility 🔹	Patient #	Search	New Message	⊥ Inbox Sent	Messages	Notifications	Print Message
Showing 1 to 4 of 4 record(s)		M 18								
Smith, - 28633 Re: Patient Test Msg subject	02-05-2020 12:51 PM		Smith Gender : Male Address :	DOB	Email : Igs	uarez44@gmail.com	Appt Sender Facility	: N/A Smith, (Patient)	- 28633	
Smith, 28633 Re: Test Msg subject	02-05-2020 12:46 PM	OK fine, w	e will get you soon.							
☐ Smith, 63962 Glasses	07-12-2018 04:13 AM	From: Smi To: Patien	t Co-ordinator							
Smith, - 63962 Glasses	07-12-2018 03:28 AM	Subject: P	95-2020 12:49 PM Patient Test Msg subject Pst Msg body							

The timestamp as it will appear to the patient on the portal.

Practice Messages			
To Patient Coordinator Subject	Message		∦ ∑Send Message
			Inbox O Sent Message
		DATE	
📄 🏹 🚔 Re: Patient Test Mag subject		02-05-2020 12:51 PM	
OK fine, we will get you soon. ORIGINAL MESSAGE From: Smith. International Content of the source of the			REPLY
📄 🦁 🖻 Re: Test Msg subject		02-05-2020 12:46 PM	



iMedic Monitor

Total Tech work-up Time column (iMedic Monitor)

There could be cases when a Tech enters/works on the chart of the patient multiple times of a patient, to accurately calculate this time, a separate column has been introduced on Extended view of iMedic monitor, "Total Tech Work-up", this column will give the accumulative of time when the Tech entered the patient's chart.

Facilit	ty Toms River		✓ Prov	ider	Dev, iMW;	~					Jan 16, 2020	6:30:58 PM				🗆 Sł	iow all appoin	tments	Extend	led 🗸 🛛 😋
Dev,	, iMW																	CHECK I	N: Smith, A Fra	nk - 67056;
Active	Patient List																			
	Patient Name	Appt. Reason	Appt. Time	Arrival	Check-In		FSh Y/N	Appt/Arrival to Now	Check-In to Now	Work-Up with Tech	Tech Room	Subwait Time	Total Tech Work-Up Time	Dilation Time	Total Subwait Time	Doctor Start Time	Doctor Room	Doctor End Time	Doctor in Room Time	Checked Ou
1	Smith, A Frank - 6 7056	Botox	10:00 am	-	06:22 pm		Ν	8 hrs 31 min s	8 mins	Test, Tania 06:26 pm	N/A	06:27 pm	1 min12 secs			Dev, iMW 06:25 pm	N/A			

Issue reported regarding NO Shows patients on the iMedic Monitor (IMM)

We have made modifications to the iMedic Monitor settings where the user can select to either show "No Show" patients or not show them.

This screen will allow you to access the iMedic Monitor setup to select the checkbox if you DO NOT want No Shows to display in the iMedic Monitor. If you have selected the option to show "No Shows" this is how they would appear in the iMedic Monitor screen.

iN	ledicMonitor Setti	ngs			
-	List "No Show" Appointm	ents 20 Minutes - Dilation Time	 Auto-Refresh Refresh in Background 		Seconds Refresh Interval
	1 list "	No Show" Appointments - Tu	rning this ON will	list No-show	w appointment
Sch	eduled Patients				
Sch #	eduled Patients Appt	Patient Name	Procedure	Provider	Message
Sch # 1 D				Provider	
# 1 1 2	Appt	Patient Name	Procedure Complex Cataract Extraction with Intraocular Lens	Provider	
# 1	Appt 09:40 AM	Patient Name NS Test, Jim - 70158	Procedure Complex Cataract Extraction with Intraocular Lens Implant	Provider Dev, iMWWW	

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