

## Medisoft Version 28 – Changes

### Corrected Claim in the Claim Management screen

Users can now add a resubmission code for the specific claims in question through the Claim Management screen

Managing rejected claims is even easier, users can now add a resubmission code for the specific claims in question through the Claim Management screen. The claim-specific resubmission code reduces the chance of being rejected for duplicate claims and could help them be processed even faster. The old method of applying the code to an entire case is still available, so providers can go with the workflow that works best for them.

Claim: 2  
Chart: AGADW000 **Again, Dwight** Case: 17  
Claim Created: 11/21/2009

AR Management

Carrier 1 | Carrier 2 | Carrier 3 | Transactions | Comment | EDI Note

Claim Status:  
 Hold  
 Ready to send  
 Sent  
 Rejected  
 Challenge  
 Alert  
 Done  
 Pending  
 Dx Error

Billing Method:  
 Paper  
 Electronic

Initial Billing Date: 11/21/2009  
Batch: 2  
Submission Count: 1  
Billing Date: 11/21/2009

Insurance 1: MED01 Medicare  
EDI Receiver:  
Frequency Type: 7  
Original Reference: PO1135809

Save  
Cancel  
Help

In Claim Management, Edit the Claim  
In the Carrier 1, 2, or 3 Tab  
**Frequency Type:** (see below).  
**7 - REPLACEMENT (Replacement of Prior Claim)**  
**8 - VOID (Void/Cancel of Prior Claim)**

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Enter the original claim number from the Insurance in the Original Reference number field

## New features added to Medisoft Version 26

### Office Hours

#### Updated New Appointment Entry screen

There is a new check box on the New Appointment Entry screen for both single and repeating appointments: **TeleHealth**. Selecting this check box is informational only at this time, and signifies that the appointment is a TeleHealth appointment. This check box enables you to keep better track of appointments that are TeleHealth appointments

**New Appointment Entry**

Chart: BRISU000 **Brimley, Susan**

Home Phone: (222)342-3444 Cell Phone: [empty]

Resource: [empty] Note: [empty]

Case: 7 Bronchitis Service Type Code: [empty]

Reason: [empty] Length: 5 minutes Color: Silver

Date: 8/4/2021 Time: 8:20 am

Provider: JM Mallard, J.D.

Repeat: No Repeat

CONNECTION Prefs

Status:

- Unconfirmed
- Confirmed
- Checked In
- Missed
- Cancelled
- Being Seen
- Checked Out
- Rescheduled

Need Referral

TeleHealth

#### Updated Office Hours main screen

There is a new field on the Office Hours main screen in the left panel: TeleHealth visit. If the TeleHealth check box is selected for a patient's appointment, you will see a Yes next to this field label, indicating that the patient's appointment is a TeleHealth appointment.

Office Hours Professional - Medical Group (Tutorial Data)

File Edit View Lists Reports Tools Help

August 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sunday 1st	Monday 2nd	Tuesday 3rd	Wednesday 4th	Thu
1	2	3	4	5	6	7					
8	9	10	11	12	13	14				Again, Dwigh?	
15	16	17	18	19	20	21				Austin, Andri?	
22	23	24	25	26	27	28					
29	30	31	1	2	3	4					
5	6	7	8	9	10	11					

Austin, Andrew

Birthdate: 1/1/1950 (71 yrs)

Home Phone: 767-2222

Cell Phone: 8:15 am

Length: 5 minutes

Resource: AUSAN000

Copay:

Remainder:

AR Status:

Insurance 1: AET00

Insurance 2:

Insurance 3:

Amount Due:

Payment Due:

Payment Due Every:

TeleHealth Visit: YES

Elig. Last Checked: 7/17/2021

CONNECTION Status:

# Transaction Entry

## Updated Transaction Entry screen

You can now see the Policy/MBI number on the Insurance tab. This information is for display only

The screenshot shows the Transaction Entry interface. On the left, there are fields for Chart (AGADW000), Case (17), and Patient Name (Again, Dwight). A dropdown menu for 'Field' is open, showing 'Date Of Birth' selected. Below this are fields for Last Payment Date, Amount, Last Visit Date, and Global Coverage Until. On the right, there is a table for charges with columns for age groups (0-30, 31-60, 61-90, 91+) and amounts. Below this is a summary of Policy Copy and Annual Deductible. On the far right, there are summary fields for Charges, Adjustments, Subtotal, Payment, Balance, and Account Total.

Now you can search by a patient's date of birth (DOB)

## Updated Patient List screen

You can now search by Date of Birth on the Patient List screen.

Select Date of Birth from the Field drop-down and then enter the date: no slashes are required.

- For single-digit months you must enter the leading zero
- For single-digit days you must enter the leading zero

Enter dates in the MMDDYYYY format with eight-digits when entering a complete date.

The screenshot shows the Patient List window. A search filter is applied to the 'Date Of Birth' field. The list of patients is filtered to show only those with a date of birth on or after 11/23/1936. The patient 'Doogan, James' is highlighted in red. The patient 'Again, Dwight' is also visible in the list. The interface includes a search bar, a field dropdown, and a list of patient records with columns for Chart Number, Name, Date of Birth, Social Security Number, Last Name, First Name, Middle Initial, Case Description, Guarantor, Closed, Insurance Carrier #1, and Insurance #.

The filter logic will show all data that is equal to or greater than what you are entering:

If you have 01 as the month, all data will show until the / is entered and then it will show everything for just January.

If you have 01/1, all data will show that is in January and equal to or greater than January 1st

If you have 01/10, all data will show that is in January and equal to or greater than January 10th

If you have 01/10/2, all data will show that is in January and equal to or greater than January 10th and equal to or greater than year 2

If you have 01/10/20, all data will show that is in January and equal to or greater than January 10th and equal to or greater than year 20

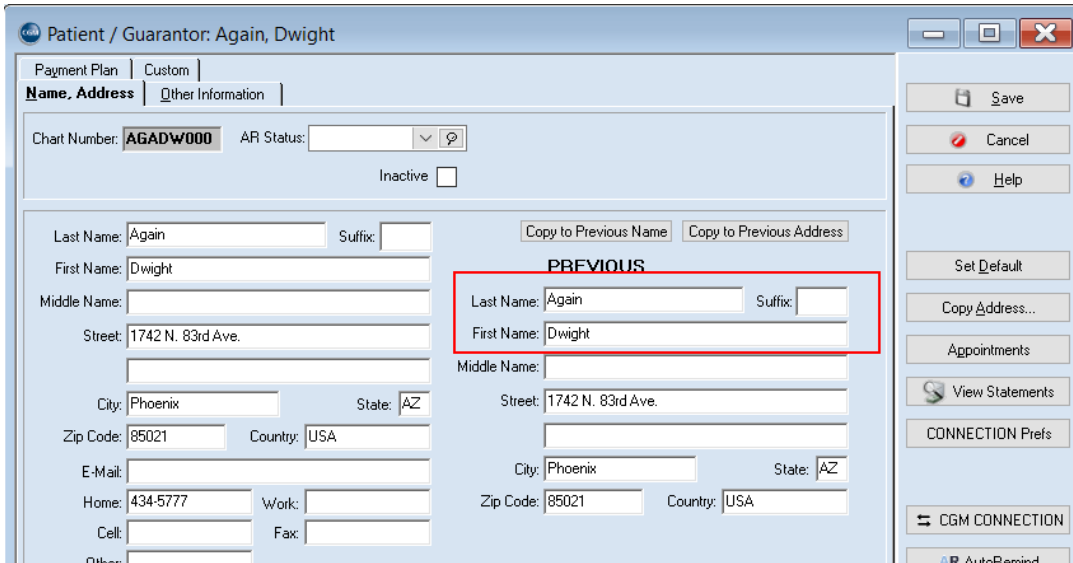
If you have 01/10/200, all data will show that is in January and equal to or greater than January 10th and equal to or greater than year 200

If you have 01/10/2000, all data will show that is in January and equal to or greater than January 10th and equal to year 2000

## Updated Patient/Guarantor screen

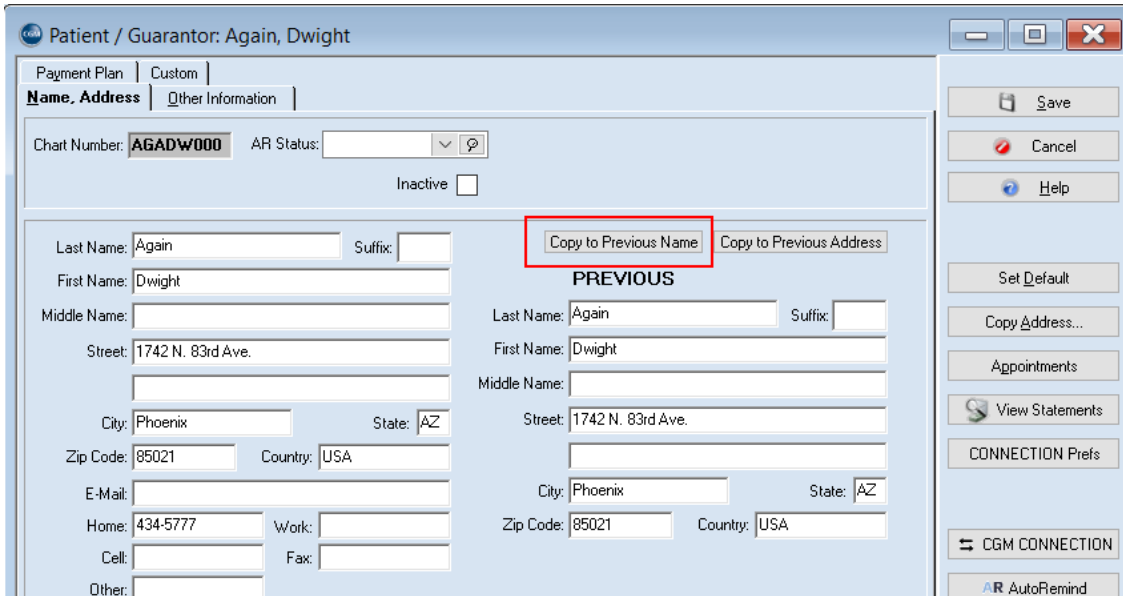
Several new fields are available on the New/Edit Patient screen to accommodate the USCDI and 21st Century CURES Act Requirements. • Previous Name • Previous Address • Birth Sex • Sexual Orientation • Gender Identity

**New field** - There is a new field on the Name, Address tab of the Patient screen: **Previous Name**. Use this field to maintain the patient's previous name.



The screenshot shows the 'Patient / Guarantor: Again, Dwight' window. The 'Name, Address' tab is selected. The 'PREVIOUS' section, which includes fields for Last Name, First Name, Middle Name, Street, City, State, Zip Code, and Country, is highlighted with a red rectangular box. Above this section are two buttons: 'Copy to Previous Name' and 'Copy to Previous Address'. The main form fields are populated with the patient's current information: Last Name: Again, First Name: Dwight, Middle Name: (empty), Street: 1742 N. 83rd Ave., City: Phoenix, State: AZ, Zip Code: 85021, Country: USA, Home: 434-5777, Work: (empty), Cell: (empty), Fax: (empty), Other: (empty).

There is also a new button: **Copy to Previous Name**. Use this button to copy the patient's current name to the Previous Name field.



The screenshot shows the same 'Patient / Guarantor: Again, Dwight' window. The 'Copy to Previous Name' button, located above the 'PREVIOUS' section, is highlighted with a red rectangular box. The rest of the form and the 'PREVIOUS' section are visible but not highlighted.

**New fields** - There is a new section on the Name, Address tab of the Patient screen: Previous address. Use the fields here to maintain the patient's previous address

The screenshot shows the 'Patient / Guarantor: Again, Dwight' screen. The 'Name, Address' tab is selected. The 'PREVIOUS' section is highlighted with a red box. The 'Copy to Previous Address' button is also visible.

Chart Number: **AGADW000** AR Status:  Inactive

Last Name: Again Suffix:  Copy to Previous Name Copy to Previous Address

First Name: Dwight

Middle Name:

Street: 1742 N. 83rd Ave.

City: Phoenix State: AZ

Zip Code: 85021 Country: USA

E-Mail:

Home: 434-5777 Work:

Cell:  Fax:

Other:

Birth Date: 3/30/1932 Sex: Male Birth Sex: Male

Birth Weight: 0 Units:  Sexual Orientation: Straight or heterosexual

Social Security:  Entity Type: Person Gender Identity: Male

Ethnicity: Not Hispanic Language:  Death Date:

Race:  American Indian or Alaska Native (I)  
 Asian (A)  
 Black or African American (B)  
 Native Hawaiian or Other Pacific Islander (P)  
 White (W)  
 Other (E)  
 Declined (7)

There is also a new Copy to Previous Address button. Click this button to copy the address fields for the current address to the Previous Address section.

The screenshot shows the 'Patient / Guarantor: Again, Dwight' screen. The 'Copy to Previous Address' button is highlighted with a red box.

Chart Number: **AGADW000** AR Status:  Inactive

Last Name: Again Suffix:  Copy to Previous Name Copy to Previous Address

First Name: Dwight

Middle Name:

Street: 1742 N. 83rd Ave.

City: Phoenix State: AZ

Zip Code: 85021 Country: USA

E-Mail:

Home: 434-5777 Work:

Cell:  Fax:

Other:

Birth Date: 3/30/1932 Sex: Male Birth Sex: Male

Birth Weight: 0 Units:  Sexual Orientation: Straight or heterosexual

Social Security:  Entity Type: Person Gender Identity: Male

Ethnicity: Not Hispanic Language:  Death Date:

Race:  American Indian or Alaska Native (I)  
 Asian (A)  
 Black or African American (B)  
 Native Hawaiian or Other Pacific Islander (P)  
 White (W)  
 Other (E)  
 Declined (7)

**New field** - There is a new field on the Name, Address tab of the Patient screen: **Birth Sex**. Choose the patient's sex assigned at birth from the drop-down list.

The screenshot shows the 'Patient / Guarantor: Again, Dwight' window. The 'Name, Address' tab is active. The 'Birth Sex' field is highlighted with a red box. The patient's current information is as follows:

Chart Number:	AGADW000	AR Status:	
Last Name:	Again	Suffix:	
First Name:	Dwight	Middle Name:	
Street:	1742 N. 83rd Ave.		
City:	Phoenix	State:	AZ
Zip Code:	85021	Country:	USA
E-Mail:			
Home:	434-5777	Work:	
Cell:		Fax:	
Other:			
Birth Date:	3/30/1932	Sex:	Male
Birth Weight:	0	Units:	
Social Security:		Entity Type:	Person
Ethnicity:	Not Hispanic	Language:	
Death Date:			

The 'PREVIOUS' information is identical to the current information. The 'Birth Sex' field is currently set to 'Male'.

**New field** - There is a new field on the Name, Address tab of the Patient screen: **Sexual Orientation**. Choose the patient's sexual orientation from the provided drop-down list.

The screenshot shows the 'Patient / Guarantor: Again, Dwight' window. The 'Name, Address' tab is active. The 'Sexual Orientation' field is highlighted with a red box. The patient's current information is as follows:

Chart Number:	AGADW000	AR Status:	
Last Name:	Again	Suffix:	
First Name:	Dwight	Middle Name:	
Street:	1742 N. 83rd Ave.		
City:	Phoenix	State:	AZ
Zip Code:	85021	Country:	USA
E-Mail:			
Home:	434-5777	Work:	
Cell:		Fax:	
Other:			
Birth Date:	3/30/1932	Sex:	Male
Birth Weight:	0	Units:	
Social Security:		Entity Type:	Person
Ethnicity:	Not Hispanic	Language:	
Death Date:			
Race:	<input type="checkbox"/> American Indian or Alaska Native (I) <input type="checkbox"/> Asian (A) <input type="checkbox"/> Black or African American (B) <input type="checkbox"/> Native Hawaiian or Other Pacific Islander (P) <input type="checkbox"/> White (W) <input type="checkbox"/> Other (E) <input type="checkbox"/> Declined (7)		

The 'PREVIOUS' information is identical to the current information. The 'Sexual Orientation' field is currently set to 'Straight or heterosexual'.



**New field** - There is a new field on the Name, Address tab of the Patient screen: Gender Identity. Choose the patient's gender identity from the provided drop-down list.

The screenshot shows a software interface for a patient named Dwight Again. The window title is "Patient / Guarantor: Again, Dwight". The interface is divided into several sections:

- Payment Plan:** Custom
- Navigation:** Name, Address (selected), Other Information
- Chart Information:** Chart Number: AGADW000, AR Status: [dropdown], Inactive [checkbox]
- Name and Address Fields:** Last Name: Again, First Name: Dwight, Middle Name: [empty], Street: 1742 N. 83rd Ave., City: Phoenix, State: AZ, Zip Code: 85021, Country: USA. There are also "Copy to Previous Name" and "Copy to Previous Address" buttons.
- PREVIOUS Section:** A duplicate of the name and address fields above.
- Demographics Section:** Birth Date: 3/30/1932, Sex: Male, Birth Sex: Male, Sexual Orientation: Straight or heterosexual, Gender Identity: Male (highlighted with a red box), Social Security: [empty], Entity Type: Person, Ethnicity: Not Hispanic, Language: [empty], Death Date: [empty].
- Race Section:** A list of checkboxes for race categories: American Indian or Alaska Native (I), Asian (A), Black or African American (B), Native Hawaiian or Other Pacific Islander (P), White (W), Other (E), Declined (7).
- Right Sidebar:** Save, Cancel, Help, Set Default, Copy Address..., Appointments, View Statements, CONNECTION Prefs, CGM CONNECTION, AutoRemind.

This information will be printed on the Cures Patient Demographics report.