Release 24.115 - August 22nd, 2024

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Executive Summary

Reports

New Daily Financial ReportUpdate to the MML Admin ScreenRelease Note | DocumentationRelease Note | DocumentationNew Appointment Eligibility Status Added toNew Option to Allow Patients to Opt-Out of MMLAppointment ReportRelease Note | DocumentationRelease NoteNew Icon for "Opted Out" MML StatusNew Cost Estimate Flag Added to Appointment ReportNee Note | DocumentationRelease NoteBiller Productivity Report EnhancementsRelease NoteRelease Note

MyMedicalLocker Updates

New Features and Updates

Reports

Appointment

• <u>U17027 - New Appointment Eligibility Status Added to the Appointment Report:</u> Added a new field to the Appointment Report for "Eligibility Status" based on batch eligibility, allowing users to report on how many were not active or missed on a given day. This new field was added to the Advanced Search of the report and as a Display Settings.

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Advanced Se	earch	×				(
▼ Commonly Used						
Appt. Date			Duration 📃	Complaint	Resource	Chart Nun
Status		~				
Туре		~				4
Appt. Duration						
Appointment						
Appt. Hour	*					4
Appt. Minute	*					4
Prior Auth.						
Description						1
Complaint						1
Comments						- i
Cancel						
Eligibility Status		~				
Has Estimate	Active	A				
	Error					
	Inactive Needs Review					4
	Payer Does Not Perform Eligibility					1
Resource	Pending	-				(
Location		~				
Category		~~	, m			~~~

- <u>U18137 New Cost Estimate Flag Added to Appointment Report:</u> Added a new field to the Appointment Report to allow users to view if an estimate has been created for an appointment. We added a new Advanced Search field for "Has Estimate" as well as a column to the table search. The new advanced search fields include the following options to select from:
 - Yes an estimate has been created for the appointment
 - No no estimate was created for the appointment
 - N/A estimates not searched (default)

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Comments					
Cancel					1
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Has Estimate	○N/A ® <u>Yes</u> ○No				
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✓ Provider/Reso	urce				
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Resource	and the second second	×	~~~~		-
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Billing

• <u>U18225 - Biller Productivity Report Enhancements</u>: We have made exciting updates to our Biller Productivity report. One of these updates includes the addition of the "Include Comment" filter option. The default setting for this field is "No" (no notes included in the report), while selecting "Yes" will include a comments column.

 Report: Appointment 					C4915		🛛 🖄 🖄 🎓 😡
				Biller Produc	tivity Report		
Run Report A Hide Rep	ort Filter						
roup and Display Opti							
	er Action	×V	Group 2:		~	Group 3:	~
Iter Options							
Claim Comment Start Date:		07/30/2024			Biller Actions:		~
Claim Comment End Date:		08/06/2024			Completed Status:		~
Assigned To:				*	User:		~
Rendering Provider:				~	Financial Class:		~
Payer:				~	Include Comment:	🔾 Yes 🔹 No	

We also moved the drill-down actions to the first column on the drill-down and made it a drop-down icon with options similar to the Daily Financial report. Additionally, we corrected the "Assigned To" field so that

when a blank "Assigned To" is selected, it does not display the person icon on the drill-down.

• <u>U17063 - New Daily Financial Report</u>: Created a new report under **Reports > Billing** called *Daily Financial Report* which shows financial data for close-of-day reporting. This report provides a Daily Summary tab displaying total dollar amounts for Insurance Payments, Patient Payments, Claims Created, and Claims Submitted, as well as an export/print capability, and an advanced search option with a claim drill-down capability that will allow your billing team to quickly identify any discrepancies. To learn more about this report click here.

Report «	🚔 🕶 Report		C4915 🗮	🖾 🖑 🗮 🖗 🚱 🥹
My Tasks Communication (9) Health Exchange (13)	Daily Financial Report			Daily Summary Advanced Search
Crders (5366) Results (18) Superbill (0) Progress Notes (0) Coursents (135)	Daily Summary			Print Leport to Excel
Prescription (IO) Reminder (0) Eligibility (0)	Today < > 🏥 08/06/2024			
 Patient Portal (124) Intake (51) Fax (0) 	\$ Insurance Payments		Patient Payments	
Fax Updox (0) Case Mgmt. (0) NYSED (3) Pop Health (805)	\$0.00 Dollar Amount	0 Quantity	\$100.00 Dollar Amount	1 Quantity
CoverMyMeds ePA (0)	Claims Created		Claims Submitted	
Appointments Security Logins Payment	\$40.00 Dollar Amount	1 Quantity	\$40.00 Dollar Amount	1 Quantity
TPS Activity Urology Extract Billing				
Billing Analytics Denial Analytics Chronic Care PM Reports				
Transactions Bypass Claim Biller Productivity Daily Financial Report				
eDocuments Disk Space EMR				
Summary of Care				
Setup				
EMR iScheduler				
E Billing				
eDocuments				
Desktop				

EMR

Patient

- <u>U17836 Updated the MyMedicalLocker Admin Screen</u>: We made the following updates to the MyMedicalLocker Admin Screen within **EMR > Search Patient> Patient Dropdown**.
 - Renamed the "Delete Key" to "Revoke Access"
 - Removed the "Temporary Key" button
 - Added the following to the MML Admin Screen list:
 - Opt Out
 - MML Welcome Letter Print
 - MML Key email/text
 - Intake Welcome Sent

Key	Requested By	Date	Status	1
164 012 851	sahmed	08/05/2024 12:37AM (CDT)	Intake Welcome Sent	
164 012 851	admin	08/05/2024 12:37AM (CDT)	MML Key email/text	
164 012 851	Patient Intake	08/05/2024 12:37AM (CDT)	Not Connected	
TEMPORARY	Intake	08/05/2024 12:35AM (CDT)	Temporary Connection	
470 368 712	sahmed	03/13/2024 2:25AM (CDT)	MML Key email/text	
470 368 712	Saif	03/13/2024 2:25AM (CDT)	Deleted	

- <u>U17912 New MyMedicalLocker Icon for Patient "Opted-out"</u>: Added a new Patient Header MML Icon that accurately displays the patient's current MML status. The MML Icon includes a tooltip that shows one of 3 current patient MML statuses:
 - MML status Enabled (file icon with checkmark)

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Hein 8	Care Team Members	Referring Phone Fax PCP Phone Fax Phone Ho Rounds	ome Rounds Eve tus tus 276	p Complete Me licare rHealth Dialysi FHealth Dialysi Enabled Olled on 07/28/	edicare	/RFS	
		Flags	~	cuit Settings			
	11						
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• MML status - Not Enabled - Invite (file icon with plus symbol)

		# • A P •
		(82
lein MD, Alex (1)	Patient Not Enabled - Invite Born 21-Sep-1941 (82y) Heinle Gender Female Primary Ins. BlueCross BlueShield Medicare	
Thursday	16 Secondary Ins. Phone Home € (615) 967-1065 Phone Work € (305) 393-9349 Phone Other € (615) 967-1065 MML Status To Not Enabled - Invite Chart # 175887 Flags ♥ Edit Settings	
	EverHealth Medical Center Allergy Testing - Dr.	

• MML status - Opted-Out (file icon with X)

		Al1 📞 🚦		(59
Care Team Members	Patient	44.0 4004 (50-)		
lame >	Born	11-Sep-1964 (59y)		
	Gender	Male		
	Primary Ins.	Self Pay Medicare - Mississippi		
	Referring	wedicare - wississippi		
	Phone			
	Fax			
	Doctor	- And the second second second		
	Phone			
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	Phone	A COLUMN AND A DOWN		
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	Phone Home	Charl Phase		
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	Phone Other	Cost 21 and		
	Rounds	AAOE 1		
		s AAOE 1, 3, MTWRF		
	MML Status	b Opted-Out		
	Chart #	82961		
	Flags	Calify Edit Settings		
2/16/2020	1	•	No Known Drug Allergie	s

iScheduler

Print/Fax Queue

<u>U17834 - Allow Patient to Opt-Out of MyMedicalLocker</u>: Added new functionality within **iScheduler> Patient dropdown> Print Queue screen** to allow users to "Print & Opt Out" of the MyMedicalLocker Welcome Letter. A new dropdown functionality within the "Print" button now provides two options: "Print" and "Print Letter & Opt-Out." The "Print Letter & Opt-Out" option prints the Welcome Letter and allows the patient to opt out of MML.

Q Sea	arch 🖶 Print 🔹	Add Clinical Summary Add Clinical Summary O Delete			
	Type P	rint & Opt-Out of MyMedicalLocker	Created	Printed Date	Printed By
	Reference	accident	12/14/2023		
2	Document	MyMedicalLocker Welcome Letter	10/19/2023		
	Reference	Lipitor 10 mg tablet	07/25/2024		
	Document	MyMedicalLocker Welcome Letter	07/19/2024		
	Document	MyMedicalLocker Welcome Letter	07/17/2023		
	Document	MyMedicalLocker Welcome Letter	06/13/2024		
	Reference	Abnormal coagulation profile	06/13/2023		
	Reference	Acc pnctr	06/13/2023		
	Reference	Accidental discharge of machine gun	06/13/2023		
	Letter	Apostrophe TEST	06/13/2023		
	Reference	Avodart 0.5 mg capsule	06/13/2023		
	Letter	Smoking Cessation	06/13/2023		
	Document	MyMedicalLocker Welcome Letter	06/12/2023		
	Reference	Bactrim DS 800 mg-160 mg tablet	05/30/2024		
	Document	MyMedicalLocker Welcome Letter	05/30/2023		
			Record (Count: 17 🔍 < 1	2 > >> Page 1 o

Bug Fixes

iScheduler

Check In/Out Dashboard

• <u>B18190 - Users Able to Delete Shared Filters in Check In/Out Dashboard:</u> Resolved an issue within the Check In/Out Dashboard where filters shared by the admin could be deleted by users with shared access, causing the filter to be deleted for all users. We have removed the ability for users without shared access to delete a filter.

Billing

Deposits

• <u>B18159 - Export for Total Posting Failing to Export:</u> Corrected an issue within **Billing > Deposits** where clicking on the "Posted Paid" amount would produce an "Unable to export data to Excel" error when trying to export the total posting from a deposit.

www.officemd.net says Unable to export data to Excel. OK