

Release 24.115 - August 22nd, 2024

Last Modified on 08/23/2024 1:14 pm EDT

Executive Summary

Reports

New Daily Financial Report

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New Appointment Eligibility Status Added to Appointment Report

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New Cost Estimate Flag Added to Appointment Report

[Release Note](#)

Biller Productivity Report Enhancements

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MyMedicalLocker Updates

Update to the MML Admin Screen

[Release Note](#)

New Option to Allow Patients to Opt-Out of MML

[Release Note](#)

New Icon for "Opted Out" MML Status

New Features and Updates

Reports

Appointment

- U17027 - New Appointment Eligibility Status Added to the Appointment Report: 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.

Report: Appointment

Advanced Search [X]

▼ **Commonly Used**

Appt. Date [] [] [] [] [] []

Status [▼]

Type [▼]

Appt. Duration [] []

▼ **Appointment**

Appt. Hour [▼]

Appt. Minute [▼]

Prior Auth. []

Description []

Complaint []

Comments []

Cancel []

Eligibility Status [▼]

Has Estimate []

Claim Number []

▼ **Provider/Resource**

Referring []

Resource []

Location [▼]

Category [▼]

Duration [] Complaint [] Resource [] Chart Number []

- **U18137 - New Cost Estimate Flag Added to Appointment Report:** 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)

Report: Appointment

Advanced Search

Commonly Used

Appt. Date: [Date Picker] [Date Picker]

Status: [Dropdown]

Type: [Dropdown]

Appt. Duration: [Text] [Text]

Appointment

Appt. Hour: [Dropdown]

Appt. Minute: [Dropdown]

Prior Auth: [Text]

Description: [Text]

Complaint: [Text]

Comments: [Text]

Cancel: [Text]

Eligibility Status: [Dropdown]

Has Estimate: N/A Yes No

Claim Number: [Text]

Provider/Resource

Referring: [Text]

Resource: [Dropdown]

Billing

- U18225 - Biller Productivity Report Enhancements:** 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 Productivity Report

Run Report Hide Report Filters

Group and Display Options

Group 1: [Dropdown] Biller Action [Dropdown] Group 2: [Dropdown] Group 3: [Dropdown]

Filter Options

*Claim Comment Start Date:	[Date Picker] 07/30/2024	Biller Actions:	[Dropdown]
*Claim Comment End Date:	[Date Picker] 08/06/2024	Completed Status:	[Dropdown]
Assigned To:	[Dropdown]	User:	[Dropdown]
Rendering Provider:	[Dropdown]	Financial Class:	[Dropdown]
Payer:	[Dropdown]	Include Comment:	<input type="radio"/> Yes <input checked="" type="radio"/> 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.

- **U17063 - New Daily Financial Report:** 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](#).

The screenshot displays the 'Daily Financial Report' interface. The main content area shows a 'Daily Summary' for the date 08/06/2024. The summary is divided into four sections:

- Insurance Payments:** \$0.00 Dollar Amount, 0 Quantity
- Patient Payments:** \$100.00 Dollar Amount, 1 Quantity
- Claims Created:** \$40.00 Dollar Amount, 1 Quantity
- Claims Submitted:** \$40.00 Dollar Amount, 1 Quantity

The interface also includes a left-hand navigation menu with categories like 'My Tasks', 'Billing', and 'Administration'. The 'Daily Financial Report' is highlighted in the 'Billing' section. At the top right, there are buttons for 'Print' and 'Export to Excel'.

EMR

Patient

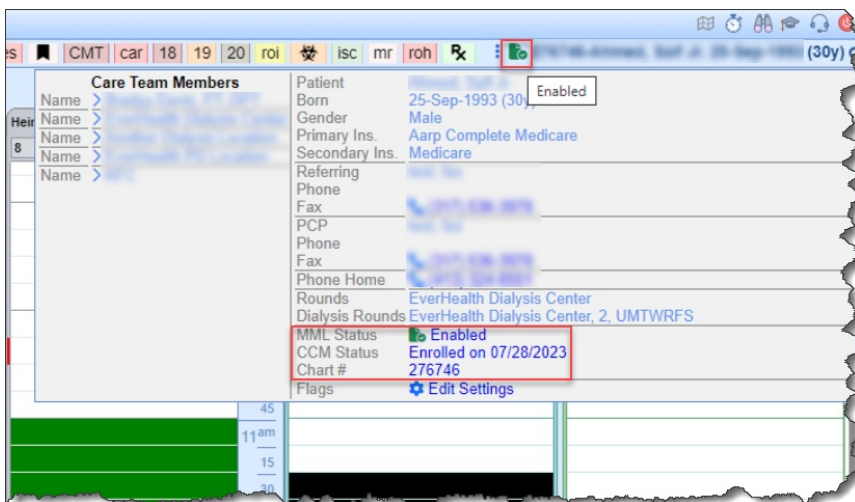
- **U17836 - Updated the MyMedicalLocker Admin Screen:** We made the following updates to the MyMedicalLocker Admin Screen within **EMR > Search Patient > Patient Dropdown**.
 - Renamed the "Delete Key" to "Revoke Access"
 - Removed the "Temporary Key" button
 - Added the following to the MML Admin Screen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

Key	Requested By	Date	Status
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

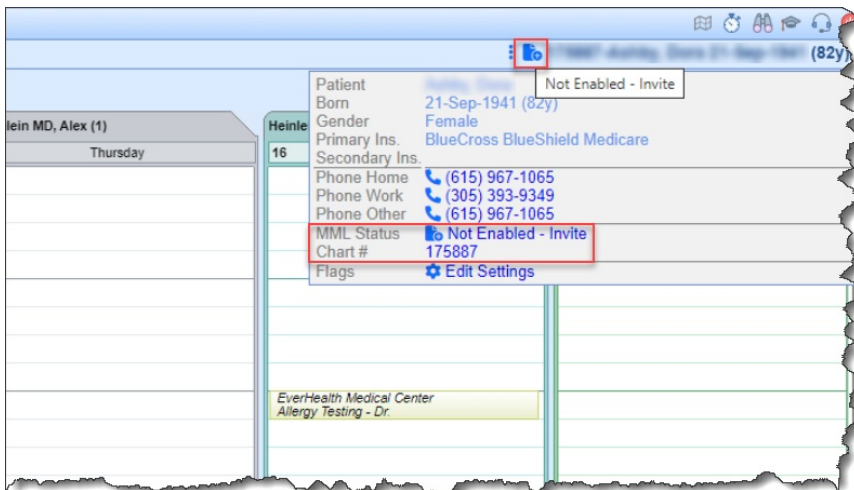
[Print Key](#)
[Revoke Access](#)
[Audit Key](#)
[Refresh](#)
[Connect Patient](#)

- U17912 - New MyMedicalLocker Icon for Patient "Opted-out": 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:

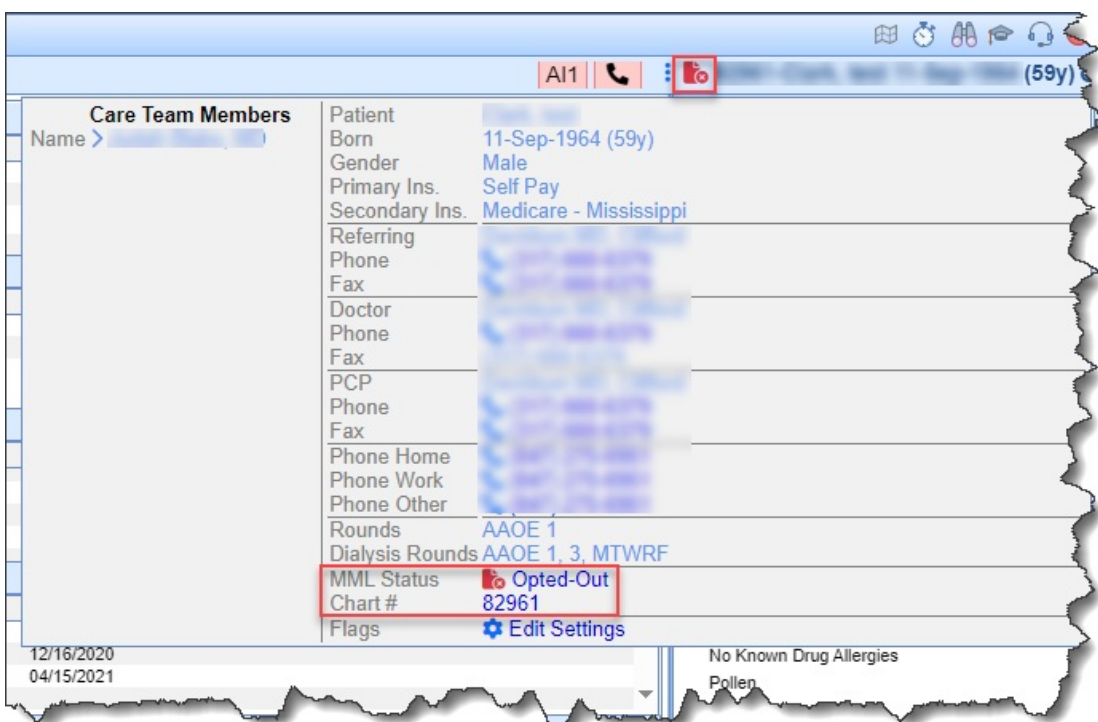
- MML status - Enabled (file icon with checkmark)



- MML status - Not Enabled - Invite (file icon with plus symbol)



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



iScheduler

Print/Fax Queue

- U17834 - Allow Patient to Opt-Out of MyMedicalLocker: 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.

Print Fax

Start Stop View Printed

Search

<input type="checkbox"/>	Type	Print & Opt-Out of MyMedicalLocker	Created	Printed Date	Printed By
<input type="checkbox"/>	Reference	accident	12/14/2023		
<input checked="" type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	10/19/2023		
<input type="checkbox"/>	Reference	Lipitor 10 mg tablet	07/25/2024		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	07/19/2024		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	07/17/2023		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	06/13/2024		
<input type="checkbox"/>	Reference	Abnormal coagulation profile	06/13/2023		
<input type="checkbox"/>	Reference	Acc pnctr	06/13/2023		
<input type="checkbox"/>	Reference	Accidental discharge of machine gun	06/13/2023		
<input type="checkbox"/>	Letter	Apostrophe TEST	06/13/2023		
<input type="checkbox"/>	Reference	Avodart 0.5 mg capsule	06/13/2023		
<input type="checkbox"/>	Letter	Smoking Cessation	06/13/2023		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	06/12/2023		
<input type="checkbox"/>	Reference	Bactrim DS 800 mg-160 mg tablet	05/30/2024		
<input type="checkbox"/>	Document	MyMedicalLocker Welcome Letter	05/30/2023		

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Bug Fixes

iScheduler

Check In/Out Dashboard

- **B18190 - Users Able to Delete Shared Filters in Check In/Out Dashboard:** 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

- **B18159 - Export for Total Posting Failing to Export:** 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
