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AcuBase Pro+ Updates

List of Changes for 8.5.41 Update

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General

- Upon import/update, AcuBase will make sure all appropriate fields are entered correctly so that the Deposit Slip report will work properly for pre-existing invoices
- Make sure Backup when closing program creates a *.USR file for single-computer users, and a *.fp7 file for network users.

Preferences / Settings

- When changing fees for procedures (CPT codes), a new button in the Preferences:Billing Codes section, CPT codes area, called "Reset Prices for Patients", will check that all fees in the patients' cases are set to current prices.
- Added a field in under Company Settings called "NPI", as well as a new "Company NPI" field within Provider Setup. When the Company NPI has the company's NPI number in it, and/or the Provider's Company NPI has a value, the company NPI will show up in the Cases and Invoices on the CMS form field #33a. If NPI of the company is different from NPI of the provider, line 33a should reflect the company's NPI, while box 24J should reflect the treating provider's NPI. Previous versions of AcuBase Pro only allowed one NPI for the provider—no separate company NPI.

Patients

- By user request, under the Patients:Billing tab, a new "Adjust All" button will do a mass adjustment for all of a given patient's invoices to zero them all out.

Invoices

- Under the Payments tab, per user request, clicking on the Date of Payment field will automatically add today's date as the date paid.
- An error in previous versions of AcuBase Pro would fill 5 of the 6 procedures lines with dates of services without procedures if no procedures were set up in the patient's case preferences. This issue has been solved.

Reports

- In previous versions of AcuBase Pro, if a user created an invoice via the Invoice Wizard, the Deposit Slip would not accurately reflect payments. This issue has been resolved.
- An error in some inventory reports that did not properly total multiple quantities of items has been resolved.
- Nine new reports have been added: Two kinds of Avery labels and a Phone Book for Referral Sources, Insurance Companies, and Vendors.

Calendar

- Added patient email to end of Tavoca script
- Made sure cancellation lists can be created for Tavoca
- For Autobilling, made sure user was not asked date of billing more than once.

Inventory

- In previous versions, when changes to the cost of an inventory item was made, reports for items sold would show the new cost when calculating profits. This has been fixed such that the profit will calculate according to the cost of the item (wholesale) at the time the items is sold (retail).
- Made sure that, upon import/update, max and min in inventory go to correct fields.

List of Changes for 8.5.40 and Earlier

General

- Fixed issue that would freeze update process when users without any inventory tried to do an update from a previous version.
- Set up all new provider's preferences for CMS form box 33b so that users may set up multiple IDs for that field.   Then, when clicking on field 33b. users will see their list of IDs as a pop-up from which they may choose the appropriate ID.
- Fixed an issue where adding two of the same CPT code numbers to Billing Preferences was giving an error.
- Cleared up / made bold many buttons and text on windows that users said were difficult to read.
- Added more in-program, on-demand help screens for old and new features.
- Added option in Preferences/General Billing to allow users to show (or not show) their tax id number on Superbills.
- In General Billing settings, added a button next to tax amount for procedures to apply a newly-changed tax amount to all existing patient case preferences so users do not have to manually change tax amounts for all existing patients.
- Redid instructions for program to add previously undocumented features, as well as new features. New program documentation may be downloaded from http://www.trigram.com/downloads/AcuBasePro.pdf.
- Redid all Find/Search screens in the program to allow easier, centralized searches with a more user-friendly interface. The new Find/Search windows also show up when doing searches as part of report creation.
- The Forms sections of both Patients and Calendar parts of the program were redone for better ease of use. Users may now select fields to merge into customized forms using a pop-up list of available fields.
- Almost every screen was reworked to make words show up more clearly on buttons and throughout the program for people with older or smaller monitors.
- Added an "Edit" button/link through program areas that relate to Settings, such as Referral Source, Vendors, and Insurance Company/Payors. In the sections of the program that ask for that information, users may add new ones to their existing Settings lists by clicking on the "Edit" button next to the field.
- Newly updated program for enhanced printing and other functionality for Vista users.
- Reset Manager password to 'password'
- Make license expiration reminder stop popping up once program is licensed
- For all parts of program, set printing so that it prints Records Being Browsed or Current Record according to the report being run rather than relying on user input
- Changed backup to save backup files as *.USR for easier retrieval
- Redid General Billing/CMS 1500 Form preferences to add numbers to CPT section, add Modifiers, and add charges. These fields auto-populate into Case-

specific billing preferences when clicked in a patient's Case Details/CMS 1500 Billing Preferences

- Added web links to coding resources from Billing Codes section of Preferences.
- In most areas with Date fields, changed fields to show calendar pop-up as an optionally clickable icon at the end of the date line, rather than popping up a pop-up calendar every time a date field is entered.
- Added three buttons to top-right corner of most relevant screens: New Window (green "+" button, which opens a new window of the current screen so users can work on multiple screens simultaneously), Resize Window (Yellow "-" button, which resizes current screen to its correct size), and Close Window (Red "X" button, which closes current window).
- Fix for networked versions for error that required users on the network to find the original file on the server when creating new invoices.
- In Settings, General Billing Preferences, added all 6 lines for auto-entry of procedures for both CMS and Superbills. Previously there was only one line which would apply itself to each clicked line in a patient's case preferences.
- Fixed security issue related to requiring logins (we won't elaborate for obvious reasons)

<u>Preferences</u>

- Option in Preferences/General Billing to show the provider's tax id on superbills (or not).
- Added Preference to turn on or off the auto-entry of adjustments for payments made to invoices.
- Added Preference to show the descriptions for CPT codes on the CMS form in the gray space above the code on the form. (Not required per CMS regulations, but requested by users.)

<u>Patients</u>

- Fixed issue where, If no billng prefs in preferences section, and tried to set up case prefs in CMS Form Box 24, would not allow to enter Place of Service unless CPT code field was entered first.
- When clicking on "All" button on List View, made it so screen always returns user to view first record. Added date record added, date modified to Find screen for Patient records.
- Added option of printing a summary patient statement from button at top-right of Billing tab screen.
- Fixed Delete/Archive button from within Cases tab to actually delete (previously, it only archived).
- Clicking New Invoice will now ask what date of service you wish to bill for, and add it to all line items for the newly-created invoice.
- Any Form created will automatically be saved to the patient's Activities section.
- Changed Middle Name field name to Middle Initial
- Make many CMS form fields auto-enter based on patient information when a new case is added (including fields 1, 4, 5, 11, 31, 33, and more).

- Have all three insurers/payors for a case automatically fill with same info as payor 1 by default.
- Fix phone numbers improperly concatenating
- Allow users to enter any codes they like for diagnosis or procedure, even if not in the preferences
- Allow edit of Provider field
- Procedures (CPTs) now pop-up and sort by name, not number.
- Activity list is now sorted by most recent date first
- Activity records print with date of activity, rather than date printed
- Changed Show All button to bring the user back to List View to see all records
- Added a customizable Patient ID field to Patients screen, which defaults to the underlying patient id assigned by AcuBase, but may be edited and will appear on CMS field 26 and on superbills
- Added an ID/SSNo field to Patients, which will appear on line 1a by default when creating new cases
- Fixed archiving retrieval bug that did not allow bring back the patient's picture when a record was retrieved from the archives
- Removed "Terms" field from Patients layout by user request
- Made new cases automatically selected as default, and when default cases are deleted, a new case is automatically set as default
- Reset tab order for Patients Overview edit screen
- Move ID No/SS No under Patient ID and take out Middle Initial, which was moved to top of screen.
- Have Cases auto-enter as many fields as possible when a new case is created
- Have Cases Box 33 be tied directly to Provider assigned to the patient, so if the provider or any provider-related info (NPI, address, etc.) changes, so does CMS 1500 Box 33 for all of the patient cases related to that provider. These fields may be modified on individual invoices
- Have Cases Box 25 auto-enter as Box 33 does above.
- Set Cases Box 1a to auto-enter patient's ID No when clicked upon or when a new case is added
- Set all Cases CMS Box 11 a-d to auto-enter patient info by default for Insured's information
- Make sure green "Go to Provider" button works from Cases screens
- New Case script used to give 3 errors ("Cannot modify field"). This was because it was trying to modify Box 33, which is a calculation. This has been fixed.
- Added Commit Records to beginning of New Invoice script so that we can be assured new changes to Case information will be reflected on new invoices.
- In Cases, changed box 33b to allow entry instead of auto-enter only. So it will auto-enter, but can be changed for each case.
- For Cases/Payors 1-3, made fields for Insured information auto-set to patient's info when those fields are clicked, but made modifiable.
- Corrected issue in Cases where, when users added a primary biller or diagnosis to a case, it wouldn't show up on the Case Details general list
- Opened Provider ID field so users can easily change providers without clicking the Edit button

- Sort Billing section by date then invoice # (reverse order, latest first)
- When looking at Case Details, make it so clicking on Case Details tab returns one to the Case Details list
- Added CMS and Superbill tabs to Case Details layout in order that Superbill prefs may be added
- Deleted unused Legend icon from bottom-left side of Case Details layouts
- Consolidated Case Details / Insurance Payor 1-3 tabs so that full CMS form shows for each.
- When creating new cases, will now auto-enter all 6 lines of procedures from Settings/Billing Preferences.
- Can click on a button to re-apply (or add for first time) all billing preferences from Settings.

<u>Invoices</u>

- Added a field to both Invoices:Overview and Payment pages that shows total (gross) amount due for all of the given patient's invoices. Click on the field and it will show you all of the invoices used to come up with that total. Note that the total is only accurate for patients in the Patients section of the program, and not for invoices entered that are not connected to patients.
- Added non-printing Notes field to Payment section of program so users can enter recurring billing notes (such as keep a credit card on file) in invoices. This field is already on the Overview tab, and the info that's in there will be auto-entered from the General Notes field in the patient's current default Case.
- Fixed an error that occurred when users logged in with 400-level security tried creating a new invoice.
- Fixed security issue related to requiring log ins to get into program.
- Fixed electronic billing issue where there were too many spaces between Diagnosis Codes, causing some clearinghouses to reject claims.
- Made CMS form entry such that hitting the return or enter keys will move the cursor to the next field rather than creating an extra carriage return in the field (which would mess up electronic billing files).
- Expanded the number of lines showing on the Procedures section of the Payments screen to six.
- Added a gross total due to the bottom of both Overview and Payments screens so that users may see the total due (for all invoices) for a given patient while on a single invoice screen, and may click on the field to see a summary of the invoices that account for that total.
- Added the Comments field to the Payments screen so that users may add repeated (non-printing) comments (such as keeping a patient's credit card info on-hand) to their Case Preferences for a given patient, and then that info will show up in the Payments tab.
- Redid Superbill and Payments entry screens to break out tax amount for both procedures and products. This was requested by New Mexican and Canadian users who charge tax on procedures.
- Switched Quantity and Price fields on Superbill's Products section, and redid tab order for easier and faster data entry.

- When clicking on "All" button on List View, made it so screen always returns user to view first record.
- Added option in Preferences/General Billing to allow users to show (or not show) their tax id number on Superbills.
- Added new feature to Payments tab screen which will auto-pay all line-items on an invoice at the price they were charged, rather than having to go through each line item and apply exact payment. This feature is accessed through an auto-pay button on the top-right side of the Payments screen for an invoice.
- Fixed issue in newly upgraded programs that would not bring procedures from a patient's case preferences into a newly-created invoice.
- Fixed issue that would delete the wrong line item when trying to delete individual line items for procedures or products on an invoice.
- Made CMS Line 33b allow for spaces per Medicare regulations.
- Added Date Paid to Find screens for Invoices.
- Changed Superbills to show amount of tax charged on procedure and product lines, rather than tax percentage.
- Changed Superbills and statements to show first line of clinic as bold and italic, and the rest of the address, etc. as plain text. Also added web address.
- Took out Invoice ID No. from top of Summary Statement, as summary is a summary of many invoice nos, not just one.
- Added option of printing a summary patient statement from button at bottom of Overview screen in Invoices.
- When clicking the Update button, invoice screen will now ask for date of service to auto-add to all line-items, and will leave user at the case-specific Superbill or CMS screen rather than at the Overview screen.
- For electronic billing, extra carriage returns entered by users would cause alignment problems. The extra carriage returns will now automatically be removed by AcuBase before creating the batch file to send to the billing clearinghouse.
- When printing multiple invoices that were just created, sometimes not all info would print because the program had not saved the information before printing. Same for electronic billing. Those issues were resolved by forcing the program to commit (save) records before printing. This may make printing multiple records a little bit slower, as the program must cycle through and save each invoice before printing or creating the electronic billing batch file.
- In Billing Wizard, took out Title pop-up field, which was distracting and unnecessary in most cases.
- When billing multiple invoices, a preview with the CMS form overlayed would show, which was distracting because, even though it did not print, it implied that the fields would not print within the margins of the form.
- Took out Print Setup screens when printing CMS or Superbills—one less thing to click.
- Fix phone numbers improperly concatenating
- Allow users to enter any codes they like for diagnosis or procedure, even if not in the preferences
- Improved CMS form printer settings

- CMS form lines 12 and 13 now allow non-pop-up list entry
- Open previously closed fields on CMS form to allow for MediCare billing preferences to be entered more precisely
- Fixed bug that would keep changes to invoices from being saved
- Make sure amounts from a patient's billing preferences are reflected on invoices correctly (previously, amounts that differed from preferences for a given code would default back to the amount set to that code on any newly created invoice)
- Several modifications to accommodate new CMS form for e-billing claims with Office Ally as the clearinghouse
- Redesigned Superbill for underlines, spacing of totals due, and Balance Due field on top and bottom, as well as adding signature line.
- When adding products to a superbill, products now sort by "Product Name on Superbill" field from Inventory
- Procedures (CPTs) now pop-up and sort by name, not number.
- Changed fields at bottom of CMS 1500 screen so that no superbill payments applied to products are calculated into CMS fields
- Corrected fields for procedures on Payments screen to include taxes if applied to procedures on the Superbill screen
- Changed Show All button to bring the user back to List View to see all records
- Change field Invoices:CMSline10d1-3 fields to allow changes
- Fixed New Invoice script when run from Patients so box 25 info comes across correctly, as well as default payor.
- Fixed Invoice box 11d so that No can be changed to Yes
- Fixed Invoice box 10d to allow more entry options
- Fix E-billing script to better align boxes, everything else. Also to make 24H correct (not repeat throughout lines 24 1-6). E-billing fixes were the largest part of this update.
- Fix HCFA print screen for more printers—all CMS data has been moved up a bit, so users may need to realign their printouts for CMS forms after this update (probably down and to the right)
- New tooltip for the New Invoice button in Invoices section
- Set CMS form up higher for printing to allow more printers to work with the program. This may require users to re-align their printers for the CMS form after they do an update.
- Added "Paid in Full" and "Balance Due: $ xx.xx" to top of Superbills
- Added a new Preference (Settings / General Billing) to turn on or off a new Billing Wizard. In Preferences / Settings, if the "Use Billing Wizard to Create Invoices" field is set to "Yes", AcuBase will lead the user through a simple 1, 2, 3 method of creating new invoices. If it is set to "No", clicking on the New Invoice button will take users straight to the new invoice without special instructions / walk-through.
- Redesigned detail windows of Invoices screens to be more intuitive. Put Payors 1-3 under Superbill and CMS categories rather than under Overview, and made CMS screens full-screen rather than two screens with the CMS form cut in half.
- Make Print Setup window show up after preview so no confusing red CMS form shows up before the preview does.

- Added Patient ID to Superbill
- Made it so Payor fields (such as Payor, ID No, Group No) don't show up unless those fields are present for the current invoice
- Activated green arrow in Billing section to go to related invoice
- Make New Invoice button return user to Detail/Invoice screen from wherever they are when they click the New Invoice button from within the Invoices section of the program.
- Fixed error where, if modifying a billing line and then user went to delete invoice, it would go into an error loop saying that the record was already being modified in another window.
- Added a statement about the Update button to the New Invoice script so users know to click "Update" to bring all of a patient's data from their record onto the invoice.
- Fixed issue where, when creating a new invoice without a link to a patient in the program, a new window titled "Update" became the current window, resulting in at least two open windows with the same information.
- If Ebilling is set to "Yes" in preferences, changed New Invoice script so that all invoices set to Superbill will be set to "Send Ebill Next Batch: No" so that superbilled patient invoices are not sent out as part of an ebill batch.
- Added invoice date to top of all Invoice screens with pop-up calendar
- Add Adjustment field to Products Payment section and recalculated all related fields to include Adjustment'
- Redid Superbill to accommodate new Products adjustments
- Redid sorts on Mass Payment screen to sort most fields from most recent, or highest amounts, to less recent/lower amounts
- Added "Auto-enter Adjustment" setting to top of Mass Payments screen
- Added message to Mass Payments screen such that, when a user clicks on the procedure info, which is meant to be edited only from the CMS or Superbill screens, users are told.
- Opened up Charges field on Mass Payments screen so users can change charges on the fly as they see fit while entering payments.
- By user request, in Case Details, CMS 1500 field 32 fields will auto-fill with the contents of field 33 when clicked upon.
- Fixed error in e-billing that would shift fields on outputted batch file to the right if the charges in CMS field 24 F (charges) were over 3 digits or more before the decimal (>99.99).
- Added Date Printed (and sort by) to Invoices List View
- Fixed Print Envelope script to only print current record being shown rather than all.
- Changed EMG and other fields to allow any entry, pop-up lists to be edited, and no error messages if users want to enter non-standard entries.

<u>Inventory</u>

- Redesigned main Inventory screen to put Vendor on same screen, and created "Other Info" tab for further information and file attachments and pictures related to the inventory item being viewed.
- When clicking on "All" button on List View, made it so screen always returns user to view first record.
- Got rid of time stamp in Adjustments table so Date field only shows date, not time.
- Added Custom Product ID number, so all product ID numbers can now be custom-added, and will default to the # given by the program when a new record is created.

<u>Reports</u>

- Created an all-new Invoices: Deposit Slip to be much more comprehensive
- Added Averages to the bottom of several reports, such as Daily Summary reports
- Fixed Invoices: Procedure Payment Summary by Date and Product Payment Summary by Date so that they found for dates searched rather than showing all.
- Fixed Invoices: Print All Outstanding onto CMS 1500 Form report, which was not printing the correct layout.
- Changed format of Patient Phone Book per user suggestion to include more information.
- New Appointment reports give statistics (detailed and summary) of how many patients of which type (according to your Calendar's "Legend" settings—New Patient, Returning, Cancel, etc.) were seen for a given time period.
- Corrected improper formatting of "Summary Procedures and Products" report.
- Reworked all Find screens for reports to be more user-friendly.
- Redid Reports screen to show report descriptions to right of selected report.
- Invoices: Summary Daily Report by Provider--changed Find script to include today's date by default; changed sort to include date of invoice (descending); changed report itself to have patient name.
- Superbill, Detailed, and Summary invoices changed to reflect new field fixes, as well as accommodate user requests
- Make Patient-related invoice reports sort dates of invoices in reverse order (most current first)
- Correct Superbill to bring in procedure name automatically, whether or not "Show Procedure Name" is selected in preferences for CMS invoices.
- Redid all reports with Products links/information to account for new Adjustment field in Products Payment section.
- Added more user-friendly features to reporting process, including instructional navigation about Finds, and ability to Find All or try again when a user's Find request does not find any records
- Made most reports sort by most recent transactions first (by date and/or invoice number).
- Added Procedure and Product Payment Summary reports by Provider per user request.

Calendar

- Added functionality of Tavoca.com to export a file with a date range of calendar events to be uploaded to Tavoca's site. Tavoca provides automated telephone reminders, no-show follow up, and personal reminders, all customized for your practice. Through AcuBase's calendar, you may export your appointments to upload to Tavoca's website, and use Tavoca's services to call and remind your patients of their appointments. No additional hardware or software purchase is required. For more on Tavoca and how we work with them, see http://www.trigram.com/news/story/trigram-partners-with-tavocacom-for-automated-appointment-reminders/.
- Got rid of huge old To Do lists from previous versions, and added button to allow a user to delete all To Do list items.
- Added 15-minute increments to calendar time pop-up (for creating/editing appointments).
- Fixed issue with Autobill Multiple that would not allow one to bill for more than three appointments.
- Fixed issue in Weekly View that would not set start time of an appointment correctly when/if the user had the Calendar in 20-minute increment view.
- Per user request, added modifiable pop-up lists to Start Time and End Time for appointments.
- Per user request, when selecting a patient, can use the tab key on the keyboard to jump right to the "Last Name Starts With" field.
- Added Autobilling functionality to Calendar. Once a patient (or patients) is/are on the calendar, and billing preferences are set up for that patient, clicking on the "Autobill Multiple Appts" button will start the process of billing for that patient. To autobill for onlyo one given patiet, click on the green "$" symbol next to the patient name. If the "$" is red, that means that billing has already been done for that date.
- Added Tavoca.com file creation abilities. Users may now go to Tavoca.com to sign up for a service that allows you to upload your appointment times and have a call service automatically make reminder calls to your patients. See Tavoca.com for more details, and/or the AcuBase User's Guide in the program (the ? icon on the top-right corner of any Calendar screen), and go to the section titled, "Automating Appt Reminder Calls with Tavoca.com".
- Per user request, we added a 20-minute increment option to appointments on the Weekly and Schedule views of the program.
- Per user request, we added a second line under each appointment in the Daily View to show patient email and phone information.
- Per user request, added Patient name to monthly view.
- Change Manager password to match AcuBasePro file so there are no errors when opening the calendar with a password
- Allow creation of new Forms in the Forms section of the calendar
- Added shortcut so users can do a keyboard shortcut (Ctrl+1) to add a new appointment
- Tighten up printing scripts