

VisiQuate Release Notes

Summer 2022



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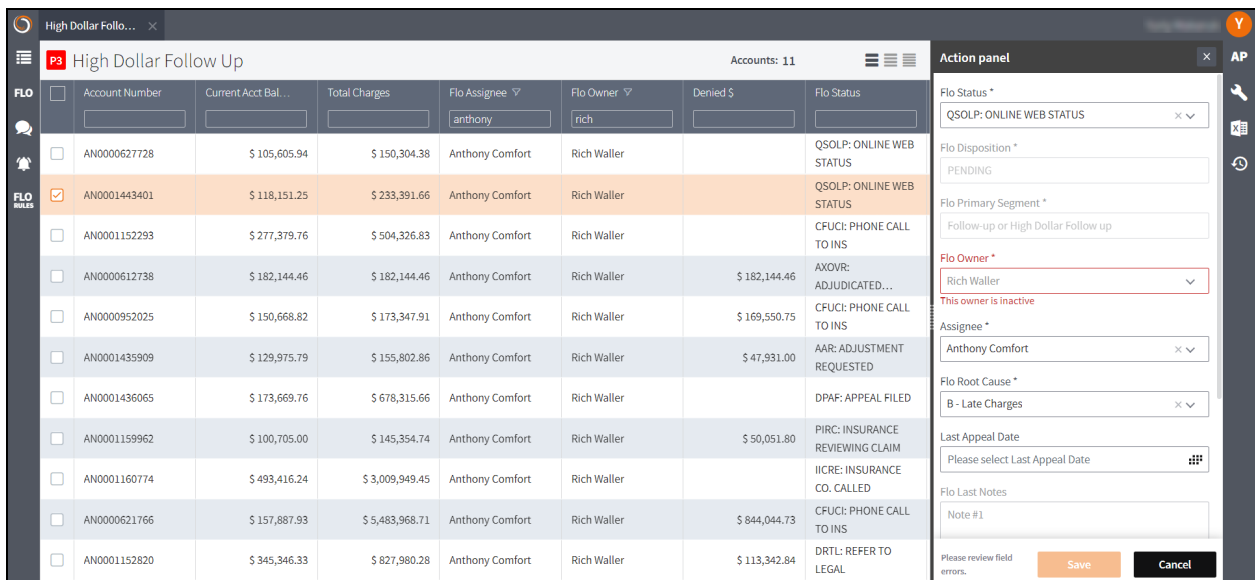
Summary

Since the first of this year, we've made a number of updates to our products that should help users be more efficient in how they interact with our products, enabled some updates in user management and put in some requested features. All of these capabilities are already available for you in your environments, so you may have noticed some of these already.

In addition, over the next couple of months we will be rolling out a revamped card view. Card View now offers a more user-friendly format of a consolidated suite of data about a patient's account. Now you can customize the interface even more by taking advantage of the following set of enhancements:

- Panels resizing
- Tabs and columns dragging
- Rows reordering
- Vertical and horizontal grid resizing
- Sorting and filtering grids and much more.

We hope you enjoy the available capabilities. If you have questions on when the new card view will be available for your domain, please contact your account manager.



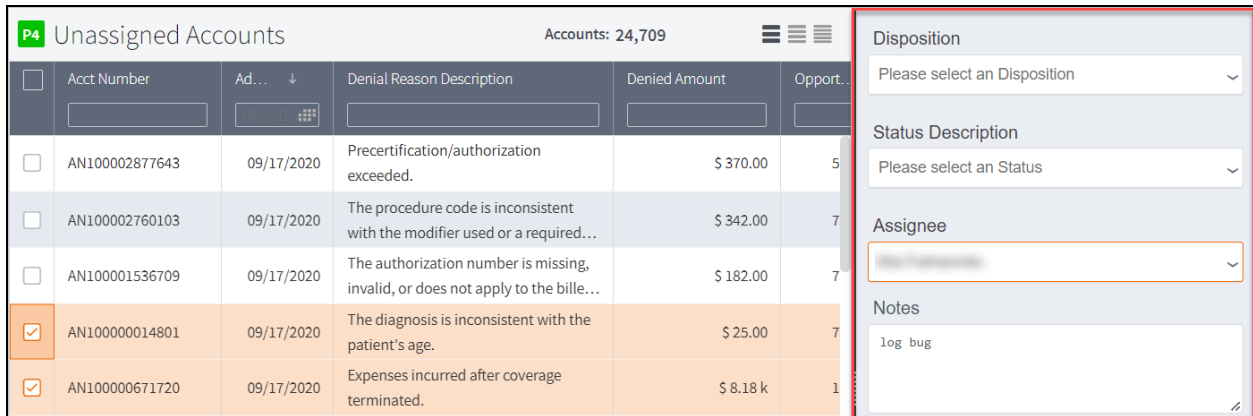
| FLO | Account Number | Current Acct Bal. | Total Charges | Flo Assignee | Flo Owner | Denied \$ | Flo Status |
|-------------------------------------|----------------|-------------------|-----------------|-----------------|-------------|---------------|---------------------------------|
| <input type="checkbox"/> | AN0000627728 | \$ 105,605.94 | \$ 150,304.38 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |
| <input checked="" type="checkbox"/> | AN0001443401 | \$ 118,151.25 | \$ 233,391.66 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |
| <input type="checkbox"/> | AN0001152293 | \$ 277,379.76 | \$ 504,326.83 | Anthony Comfort | Rich Waller | | CFUCI: PHONE CALL TO INS |
| <input type="checkbox"/> | AN0000612738 | \$ 182,144.46 | \$ 182,144.46 | Anthony Comfort | Rich Waller | \$ 182,144.46 | AXOVR: ADJUDICATED... |
| <input type="checkbox"/> | AN0000952025 | \$ 150,668.82 | \$ 173,347.91 | Anthony Comfort | Rich Waller | \$ 169,550.75 | CFUCI: PHONE CALL TO INS |
| <input type="checkbox"/> | AN0001435909 | \$ 129,975.79 | \$ 155,802.86 | Anthony Comfort | Rich Waller | \$ 47,931.00 | AAR: ADJUSTMENT REQUESTED |
| <input type="checkbox"/> | AN0001436065 | \$ 173,669.76 | \$ 678,315.66 | Anthony Comfort | Rich Waller | | DPAF: APPEAL FILED |
| <input type="checkbox"/> | AN0001159962 | \$ 100,705.00 | \$ 145,354.74 | Anthony Comfort | Rich Waller | \$ 50,051.80 | PIRC: INSURANCE REVIEWING CLAIM |
| <input type="checkbox"/> | AN0001160774 | \$ 493,416.24 | \$ 3,009,949.45 | Anthony Comfort | Rich Waller | | IICRE: INSURANCE CO. CALLED |
| <input type="checkbox"/> | AN0000621766 | \$ 157,887.93 | \$ 5,483,968.71 | Anthony Comfort | Rich Waller | \$ 844,044.73 | CFUCI: PHONE CALL TO INS |
| <input type="checkbox"/> | AN0001152820 | \$ 345,346.33 | \$ 827,980.28 | Anthony Comfort | Rich Waller | \$ 113,342.84 | DRTL: REFER TO LEGAL |

New Features in Action Panel

This section describes how AP has been improved to bring users the best experience while working and taking advantage of all the available features.

Action Panel Stays Open

In Flo, the Action Panel can stay open while users select other or additional records in the grid. This will help users reduce the number of clicks to reopen the panel when selecting a new record.



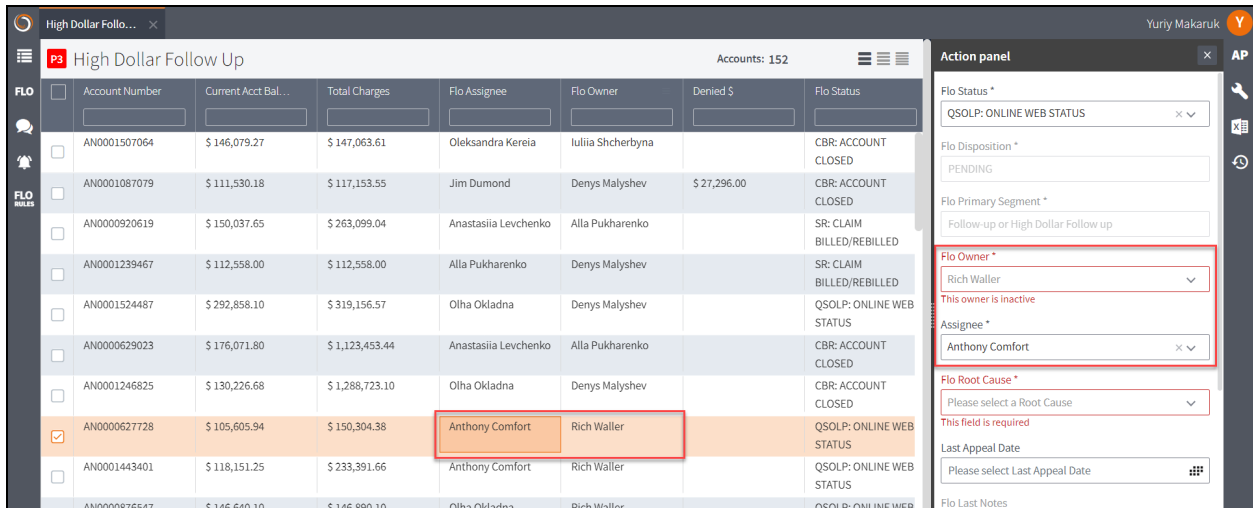
P4 Unassigned Accounts Accounts: 24,709

| Act Number | Ad... | Denial Reason Description | Denied Amount | Opport... |
|----------------|------------|---|---------------|-----------|
| AN100002877643 | 09/17/2020 | Precertification/authorization exceeded. | \$ 370.00 | 5 |
| AN100002760103 | 09/17/2020 | The procedure code is inconsistent with the modifier used or a required... | \$ 342.00 | 7 |
| AN100001536709 | 09/17/2020 | The authorization number is missing, invalid, or does not apply to the bille... | \$ 182.00 | 7 |
| AN100000014801 | 09/17/2020 | The diagnosis is inconsistent with the patient's age. | \$ 25.00 | 7 |
| AN100000671720 | 09/17/2020 | Expenses incurred after coverage terminated. | \$ 8.18 k | 1 |

Action Panel:

- Disposition: Please select an Disposition
- Status Description: Please select an Status
- Assignee: [Redacted]
- Notes: log bug

In this new feature, Action Panel fields are updated automatically as the users select/deselect accounts on a grid.



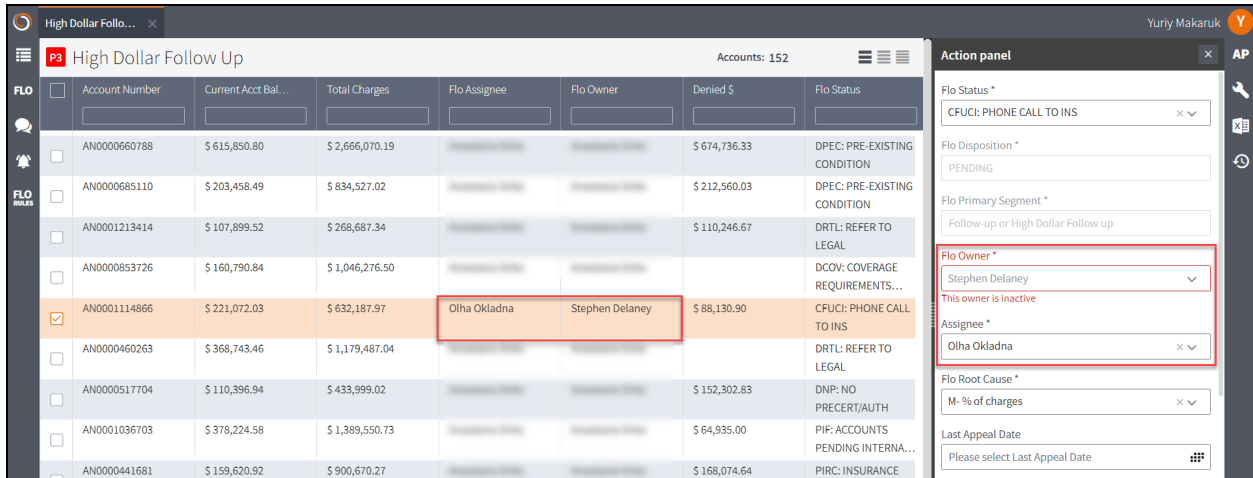
P3 High Dollar Follow Up Accounts: 152

| Account Number | Current Acct Bal... | Total Charges | Flo Assignee | Flo Owner | Denied \$ | Flo Status |
|----------------|---------------------|-----------------|----------------------|------------------|--------------|---------------------------|
| AN0001507064 | \$ 146,079.27 | \$ 147,063.61 | Oleksandra Kereia | Iulia Shcherbyna | | CBR: ACCOUNT CLOSED |
| AN0001087079 | \$ 111,530.18 | \$ 117,153.55 | Jim Dumond | Denys Malyshev | \$ 27,296.00 | CBR: ACCOUNT CLOSED |
| AN0000920619 | \$ 150,037.65 | \$ 263,099.04 | Anastasiia Levchenko | Alla Pukhareno | | SR: CLAIM BILLED/REBILLED |
| AN0001239467 | \$ 112,558.00 | \$ 112,558.00 | Alla Pukhareno | Denys Malyshev | | SR: CLAIM BILLED/REBILLED |
| AN0001524487 | \$ 292,858.10 | \$ 319,156.57 | Olha Okladna | Denys Malyshev | | QSOLP: ONLINE WEB STATUS |
| AN0000629023 | \$ 176,071.80 | \$ 1,123,453.44 | Anastasiia Levchenko | Alla Pukhareno | | CBR: ACCOUNT CLOSED |
| AN0001246825 | \$ 130,226.68 | \$ 1,288,723.10 | Olha Okladna | Denys Malyshev | | CBR: ACCOUNT CLOSED |
| AN0000627728 | \$ 105,605.94 | \$ 150,304.38 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |
| AN0001443401 | \$ 118,151.25 | \$ 233,391.66 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |
| AN0000876547 | \$ 146,640.10 | \$ 146,890.10 | Olha Okladna | Rich Waller | | OSOLP: ONLINE WEB |

Action Panel:

- Flo Status: QSOLP: ONLINE WEB STATUS
- Flo Disposition: PENDING
- Flo Primary Segment: Follow-up or High Dollar Follow up
- Flo Owner: Rich Waller (This owner is inactive)
- Assignee: Anthony Comfort
- Flo Root Cause: Please select a Root Cause (This field is required)
- Last Appeal Date: Please select Last Appeal Date
- Flo Last Notes

Users see changes immediately without the need for additional clicks or reloading the page.

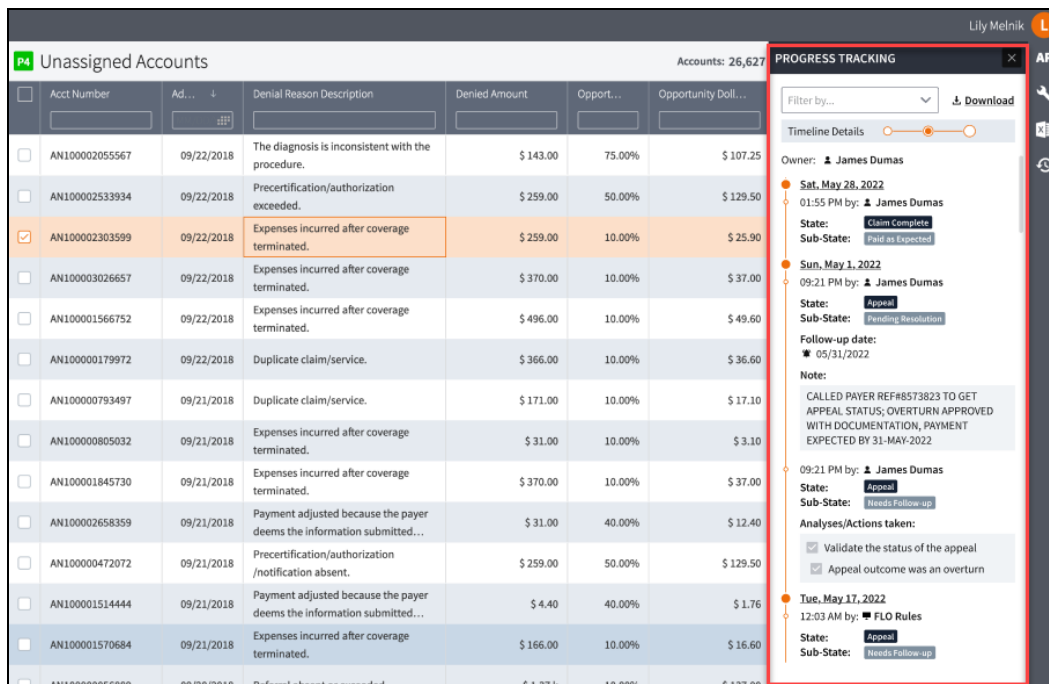


Note: If users have made changes to any of the Action Panel fields, they will be prompted to discard changes or save changes and work on the new record.

Changed the behavior of the Action Panel and Item History

Item History opens in the right-side panel

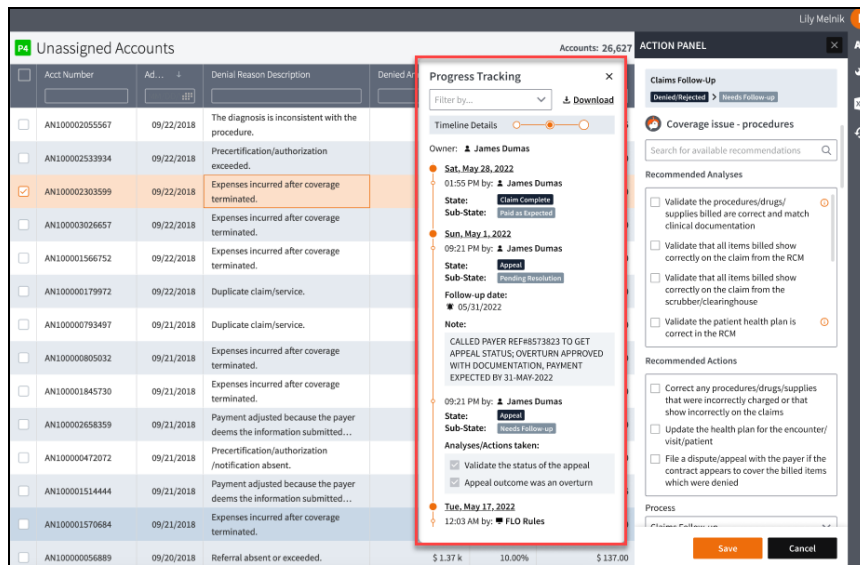
User can now open Item History in a right-side panel when only one account is selected and the Action Panel is closed or Worklist Options is open.



Note: When Item History is open as a right-side panel, the user can select a different Worklist item by clicking it. The previous item is automatically deselected and the history panel is reloaded with the contents related to the newly selected item.

Item History opens next to Action Panel

Item History now opens next to the Action Panel when only one account is selected and the Action Panel is open.



Note: When the user selects another Worklist item or deselects the currently selected item, Item History automatically closes.

Closing Item History

Now Item History closes If:

- The user clicks the Item History button while Item History is open.
- The user opens another panel.
- The user deselects the Worklist item.
- The user selects one more Worklist item by selecting its check box.

Showing Field Values on Timeline Detail

We have updated the Timeline Details panel which allows users to show compact history, standard history, or expanded history by selecting radio buttons. Now the compact version shows users the field values instead of the field names.

| New contracted version | Old contracted version |
|---|--|
| <div> Filter by... Download </div> <div> Timeline Detail </div> <div> <p>Wed, Feb 10, 2021</p> <p>6:27 PM</p> <p>CFUCI: PHONE CALL TO INS, PENDING, 2021-02-24, Anthony Comfort, Rich Waller</p> <p>Wed, Jan 20, 2021</p> <p>5:33 PM</p> <p>"Note #1"</p> <p>Fri, Jan 15, 2021</p> <p>3:55 PM</p> <p>SUBMITTED</p> <p>3:55 PM</p> <p>SR: CLAIM BILLED/REBILLED, 2021-02-05</p> </div> | <div> Progress Tracking × </div> <div> Filter by... Download </div> <div> Timeline Details </div> <div> Owner: James Dumas </div> <div> <p>Sat, May 28, 2022</p> <p>01:55 PM</p> <p>State, Substate</p> <p>Sun, May 1, 2022</p> <p>09:21 PM</p> <p>State, Substate, Follow-up date, Note</p> </div> |

Filters Reset Grid and Action Panel

Currently if a user selects one or more accounts and then applies filters to the workflow grid, the accounts remain selected, even if they don't qualify for the filters. In order to ensure a consistent experience and avoid potential issues of incorrectly updating accounts, the system will now unselect any accounts and close the action panel when filters are applied to the grid.

| P3 High Dollar Follow Up | | Accounts: 146 | | | | AP | |
|--------------------------|----------------|--------------------|---------------|-----------------|-------------|---------------|---------------------------------|
| <input type="checkbox"/> | Account Number | Current Acct ... ▾ | Total Charges | Flo Assignee | Flo Owner | Denied \$ | Flo Status |
| <input type="checkbox"/> | | >100000 | | | | | |
| <input type="checkbox"/> | AN0000627728 | \$ 105,605.94 | \$ 150,304.38 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |
| <input type="checkbox"/> | AN0000169552 | \$ 208,048.18 | \$ 378,269.41 | | | \$ 378,269.41 | AIPU: INSURANCE PLAN ID UPDATED |
| <input type="checkbox"/> | AN0001443401 | \$ 118,151.25 | \$ 233,391.66 | Anthony Comfort | Rich Waller | | QSOLP: ONLINE WEB STATUS |

Saving Action Panel Changes

This new feature prevents the user from losing unsaved changes made in the Action Panel. Before closing the Action Panel with unsaved changes and making other changes in the

worklist, a dialog window appears prompting the user to make a decision whether to save the changes made in the Action Panel.

You have unsaved changes

Please save the applied changes before closing the current panel and opening another one.

Save
Discard Changes
Cancel

Read-only Action Panel

Now users without permission to edit worklist items can view Action Panel fields and values in the read-only mode. This allows sites to grant users access to see the Action Panel and its fields for training, audit, or other purposes without allowing users to make changes if they shouldn't do so.

| Accounts: 227 | | | Action panel ✕ | |
|----------------------|----------------------|----------------------|--|--|
| Patient Type | Patient Last Name | Cu | Flo Status * | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <div style="border: 1px solid #ccc; padding: 2px;"> SR: CLAIM BILLED/REBILLED </div> | |
| IP-DISCHARGED | Trobe | B | Flo Disposition * | |
| | | P | <div style="border: 1px solid #ccc; padding: 2px;"> SUBMITTED </div> | |
| IP-DISCHARGED | Joice | B | Flo Primary Segment * | |
| | | C | <div style="border: 1px solid #ccc; padding: 2px;"> High Dollar Follow Up </div> | |
| IP-DISCHARGED | Welden | A | Flo Owner * | |
| | | C | | |
| IP-DISCHARGED | Stilgo | C | | |

Keyboard Navigation

In the Action Panel, users now can move between the fields using the keyboard. Press the Tab button to move down or the Shift+Tab buttons to move up on the panel.

Action panel

Flo Status *

QSOLP: ONLINE WEB STATUS

Flo Disposition *

PENDING

Flo Primary Segment *

Follow-up or High Dollar Follow up

Flo Owner *

Jim Dumond

Action panel

Flo Status *

QSOLP: ONLINE WEB STATUS

Flo Disposition *

PENDING

Flo Primary Segment *

Follow-up or High Dollar Follow up

Flo Owner *

Jim Dumond

Miscellaneous Features and Improvements

Grid View Filtering

We've made updates to how the grid view filtering works, as well as how the numeric and date fields display. These updates help ensure consistency in what users see, and how they can filter values.

The formatting of the grid view will now appear as:

| Column Type | Pattern | Examples |
|------------------|--|---------------------------------------|
| Numerical fields | Integer or decimal Every three digits of the integer are separated by spaces The full stop is used to separate decimal digits '-' sign is used in negative values, no space between the sign and the number | 12 222 -12 222 12 222 222.22222 |

| | | |
|--------------------|--|--|
| Currency fields | 1. \$ {full or abbreviated positive integer or decimal} 2. -\$ {full or abbreviated positive integer or decimal} 3. {full or abbreviated positive or negative integer or decimal} '\$' sign is used before the number w/ one space between the sign and the number | \$ 45.21 45.21 -\$ 5 777.24 \$ 1 189 777.22 |
| % fields | 1. {full or abbreviated positive or negative integer or decimal} % 2. {full or abbreviated positive or negative integer or decimal} '%' sign is used after the number w/o spaces between the sign and the number | 42 42.2% -42% |
| Date fields | mm/dd/yyyy | 05/02/2022 |
| Abbreviation Rules | | |
| Numeric fields | Integers Numbers < 10 000 -> show a raw number (no spaces or symbols) Numbers >= 10 000 but <1 000 000 -> shorten using the 'K' symbol, on hover show the full value Numbers >= 1 000 000 -> shorten using the 'M' symbol, on hover show the full value The same applies to negative numbers | 12 000 or 12 222 -> 12K 120 000 or 120 222 -> 120K 1 200 000 or 1 222 222 -> 1.2M 12 000 000 or 12 222 222 -> 12M 120 000 000 or 120 222 222 -> 120M |
| Numeric fields | Decimals Same as integers | 12 000 000.1 -> 12M |
| Currency fields | \$ {abbreviated numeric value} | \$ 120M -\$ 120M |
| % fields | N/A | N/A |
| Date fields | N/A | N/A |

And filtering in the grid view now accepts the following options:

| Column Type | Allowed filter values | Single Value Examples | Multiple Value Examples |
|-----------------------------------|--|--|---|
| Numeric fields (positive numbers) | 1. Full integer 2. Abbreviated integer (copied from the grid or in the format that matches values on the grid) 3. Full decimal 4. Abbreviated decimal (copied from the grid or in the format that matches values on the grid) | 12222 12 222 12222.222 12K 1.2k | 12222,13 222,12222.222,1.7k,13 222 111,120M |
| Numeric fields (negative numbers) | -{full or abbreviated positive integer or decimal} | -12222 - 12 222 -12K - 120M | -12222,- 13 222,12222.222,1.7k |
| Currency fields | 1. \${full or abbreviated positive integer or decimal} 2. -\${full or abbreviated positive integer or decimal} 3. {full or abbreviated positive or negative integer or decimal} | \$ 45.21 45.21 -\$ 5 777.24 \$ 1 189 777.22 - \$ 120 M | \$ 45.21,45.21,-\$ 5 777.24,- \$ 120M,-\$121m |
| % fields | 1. {full positive or negative integer or decimal}% 2. {full positive or negative integer or decimal} | 42 42% -42% | 42,43%,-41% |
| Date fields | 1. mm/dd/yyyy 2. {full or abbreviated name of the month} 3. {full or abbreviated name of the month} {year} | 05/02/2022 February Feb 2022 | 05/02/2022,Feb 2021,February2020 |

DMA and PayFlo Content Updates

- New EOB Lookup table - Our team has updated the EOB lookup table to utilize both CARC and RARC codes to drive denial sub-type and a new opportunity rank field (replaces the opportunity percentage).

- Opportunity Rank can be used to replace the opportunity percentage field. The new field utilizes just high/medium/low to provide directional guidance and is based on a review of data aggregated from across client sites by our denial experts. The move to a 3-tier rank vs a percentage was made because the percentages were generally grouped to just 3 values, and it was felt they were overly specific.
- All standard codes (revenue, CPT/HCPCs, CARC, RARC) were updated to the latest standards
- Standard fields were added for low dollar, low opportunity, and RARC hierarchy. Logic was updated for high dollar flags, payment variance (previously underpaid) amounts and flags.
- Additional logic was embedded within the CARC Hierarchy lookup so it includes RARC as well as denial opportunity and complexity, in addition to the dollar amount.
- Please work with your account manager and support team to take advantage of these changes. **Review will be required to merge any EOB lookup customizations that have been done for your site with the updates that have been made to our standard**


User Management

For users that have access to the user management features within Visiquate, the following changes have been made.

User Creation and Activation Date

When editing user account, you can now see additional information: the date of account creation and the most recent date when the account was activated.

[Back to the list](#)



Eric Cartman


End User
Deactivated

Deactivated: 12/11/20 6:54:50 PM by: [system](#)
Created: 03/12/20 11:56:02 AM by: [Lauren Smith](#)
Last Login Date: 06/18/20 10:24:33 PM

Groups: 4 | Permissions: 4

☐ Active user
☐ Is Tenant Admin

[Back to the list](#)



John Doe
 Groups: 3 | Permissions: 6

[Activate](#)

Activated: 12/23/21 11:21:50 AM by: [james.gilbert](#)
 Created: 01/30/20 6:24:51 PM by: [james.gilbert](#)
 Last Login Date: 05/27/21 4:17:08 PM

☒ Active user
 ☐ Is Tenant Admin

To view this information:

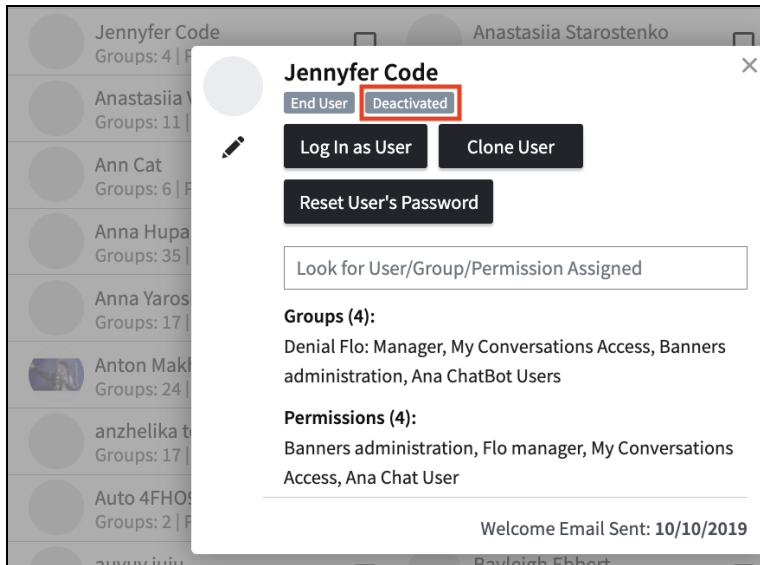
1. Open the User Management window from the top-right User menu.
2. Right-click a profile and select **Edit**.

In the opened window, information about the creation and activation of a user is displayed.

Note: Some profiles may contain only the creation date.

Indication of Deactivated Users

Added better indication of deactivated users, which is now available in the Edit Users dialog window.



Jennyfer Code
 Groups: 4 | F

End User **Deactivated**

[Log In as User](#) [Clone User](#)

[Reset User's Password](#)

Look for User/Group/Permission Assigned

Groups (4):
 Denial Flo: Manager, My Conversations Access, Banners administration, Ana ChatBot Users

Permissions (4):
 Banners administration, Flo manager, My Conversations Access, Ana Chat User

Welcome Email Sent: 10/10/2019

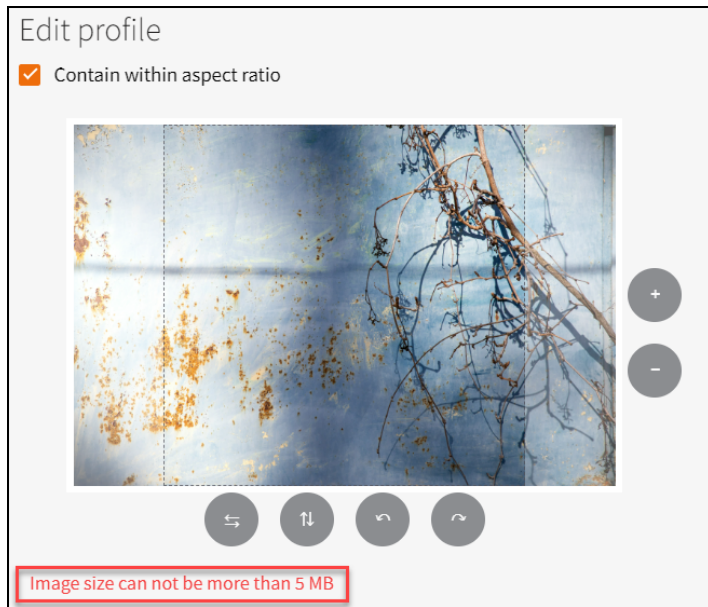
To view this information:

1. Open the User Management window from the top-right User menu.
2. Select the **Deactivated Users** check box and right-click a profile.

In the opened Edit Users dialog window, information about user deactivation is displayed.

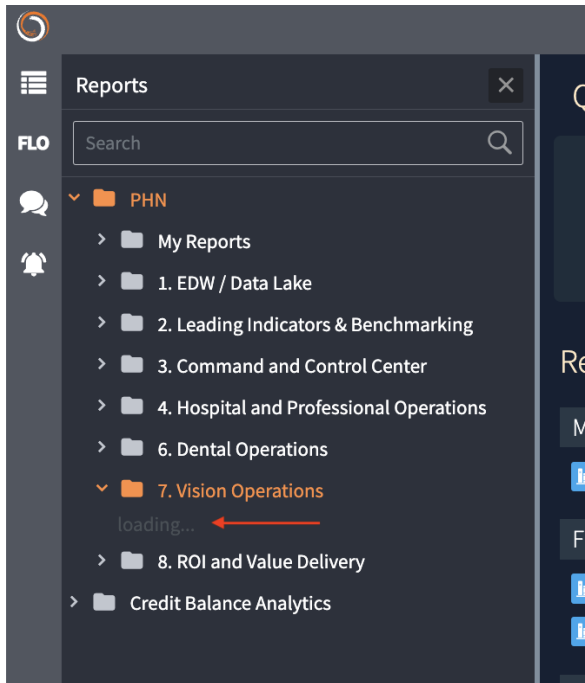
Avatar Error Message

When editing a user profile, an error message is now shown if an avatar is bigger than 5 MB.



Improved Performance of Report Tree

The report tree accessible from the Reports menu on the left panel has improved. In order to speed up content loading, the system now loads it in parts per user request instead of loading all folders and elements at once. That means that the content in folders is loaded when you open that folder. This way, you see high-level folders immediately without waiting for all the content to be loaded.

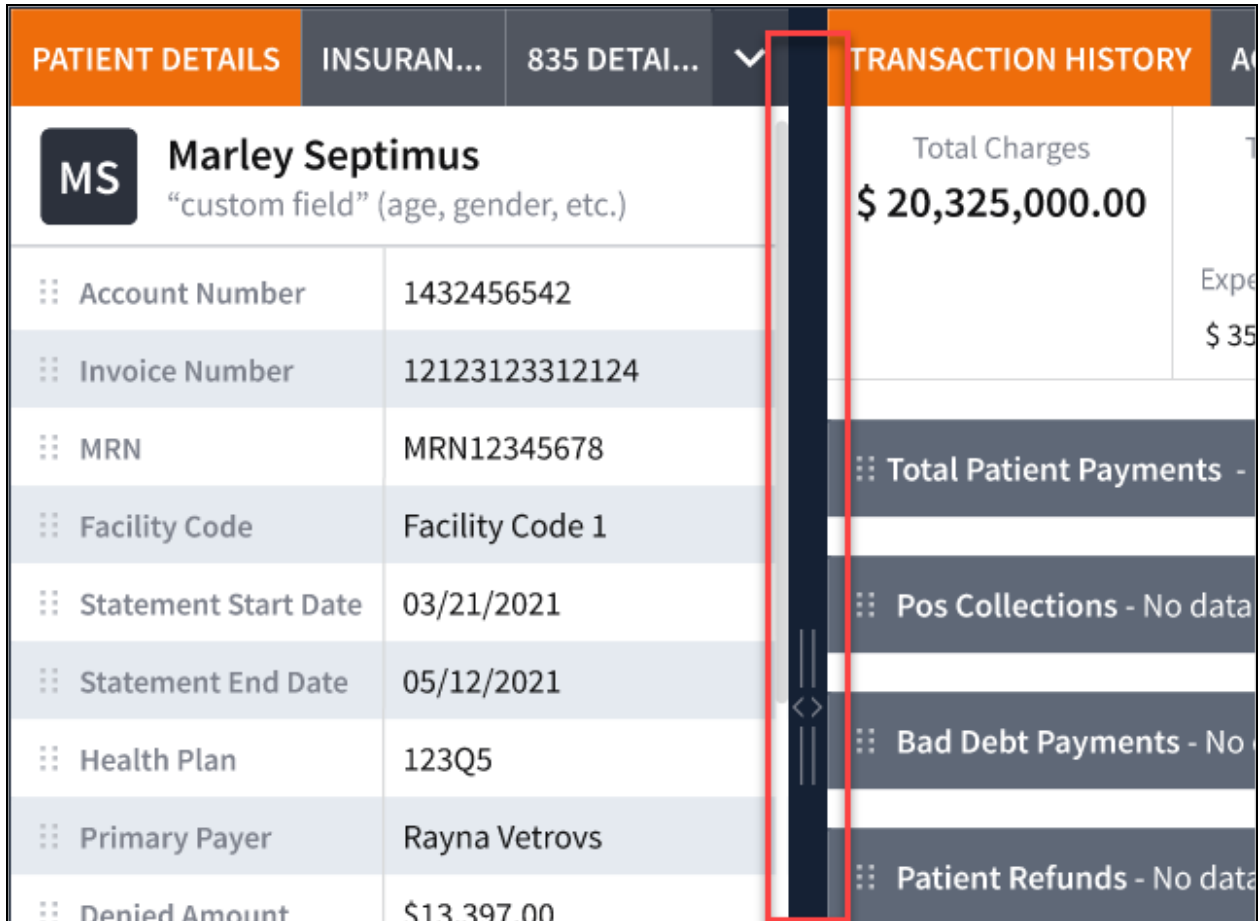


New Features in CardView

This section describes how CardView has been improved to bring users the best experience while working and customizing the app to suit their needs.

Resizing Panels

This feature allows adjusting the size of panels by dragging the boundary of panels left or right. This improves the readability of the content presented in each section.



| PATIENT DETAILS | | INSURAN... | 835 DETAI... | TRANSACTION HISTORY |
|--|-----------------|--|--------------|---------------------|
| MS Marley Septimus "custom field" (age, gender, etc.) | | Total Charges \$ 20,325,000.00 | | |
| Account Number | 1432456542 | Expe \$ 35 | | |
| Invoice Number | 12123123312124 | | | |
| MRN | MRN12345678 | Total Patient Payments - | | |
| Facility Code | Facility Code 1 | Pos Collections - No data | | |
| Statement Start Date | 03/21/2021 | Bad Debt Payments - No | | |
| Statement End Date | 05/12/2021 | Patient Refunds - No data | | |
| Health Plan | 123Q5 | | | |
| Primary Payer | Rayna Vetrovs | | | |
| Denied Amount | \$13,397.00 | | | |

Dragging Tabs

This feature allows users to reorder tabs on the panel by dragging them. This helps move tabs around to create the most efficient working environment.

| TRANSACTION HISTORY | | COUN... | PAYER P... | RECCOM... | ▼ |
|---------------------|--------|---------------|-------------|-------------|---|
| Tot Charges | | Total BP PMTS | | Balance | |
| \$ 209,000.00 | | Expected | Variance | \$ 7,351.02 | |
| | | \$ 7,351.02 | \$ 7,351.02 | | |
| Total HP Payments ^ | | | | | |
| Payments | Actual | Expected | Variance | | |

Selecting Tabs

This feature allows user to open the drop-down menu (2) that lists all the tabs present in the current section and then make a selection.

| TRANSACTION HISTORY | ACCOUNT... | PAYER P... | RECCOM... | 1 | ^ |
|---------------------|----------------|---------------------|----------------------|---|---|
| Total Charges | Total Payments | Transaction History | | | |
| \$ 20,325,000.00 | \$ 473.8 | 2 | | | |
| | Expected | Variance | Account Activity | | |
| | \$ 351.02 | \$ 122.8 | Payer Portal Message | | |
| | | | Recomendations | | |

Vertical Grid

This section lists improvements that bring users the best experience while working and customizing the Vertical Grid.

Resizing Vertical Grids

This feature allows adjusting the size of columns to free the widget's working space. For example, this allows users to minimize the names column to better see the values column.

| PATIENT... | INSURANCE DETAILS | 835 DET... | TRANSACTION HISTORY | ACCOUN... | PAYER P... | RECCOM... |
|---|-------------------|------------|---|------------|--------------|-----------------|
| MS Marley Septimus "custom field" (age, gender, etc.) | | | Overpayment Adjustments \$ 571,000.00 \$ 871,000.00 -\$ 300,000.00 | | | |
| Primary Insurance ^ | | | WO Adjustments \$ 571,000.00 \$ 871,000.00 -\$ 300,000.00 | | | |
| Health Plan Name BDVS OF IN- MPJ12 | | | Other Adjustments \$ 571,000.00 \$ 871,000.00 -\$ 300,000.00 | | | |
| Policy Number ZXC1235456547 | | | Transactions Listing ^ | | | |
| Balance \$ 6,123.40 | | | Txn Cat | Txn Date | Amount | Txn Ins Plan |
| Receivable ID 4341312312 | | | Total \$ 9,832.00 | | | |
| Effective Date 12/01/2013 | | | CA Auto | 02/04/2021 | -\$ 7,532.00 | BDVS OF IN- MP. |
| Authorization Number N/A | | | CA Auto | 02/04/2021 | -\$ 212.00 | BDVS OF IN- MP. |
| Group Number 52341 | | | CA Auto | 02/04/2021 | -\$2,387.00 | BDVS OF IN- MP. |
| Secondary Insurance ^ | | | CA Auto | 02/04/2021 | \$ 122.00 | BDVS OF IN- MP. |

Patient Information Widget

This widget displays the patient's full name and additional information about such values as gender, age etc., which is now pinned at the top of the main section even when the user scrolls down the grid.

PATIENT DETAILS

INSURAN...

CODING...

▼

MS

Marley Septimus

"custom field" (age, gender, etc.)

| | |
|----------------------|-----------------|
| Account Number | 1432456542 |
| Invoice Number | 12123123312124 |
| MRN | MRN12345678 |
| Facility Code | Facility Code 1 |
| Statement Start Date | 03/21/2021 |
| Statement End Date | 05/12/2021 |
| Primary Payer | Rayna Vetrovs |

Reordering Rows in Vertical Grid

This feature allows users to reorder rows in the vertical grid by dragging them up/down in the grid. This lets users group information in a more intuitive and task-oriented way.

The left alignment and formatting of names and values has improved visual representation for a user that works with the information in the vertical grid.

| | |
|---------------------|-------------------|
| Primary Insurance ^ | |
| Health Plan Name | BDVS OF IN- MPJ12 |
| Policy Number | ZXC1235456547 |
| Balance | \$ 6,123.40 |
| Receivable ID | 4341312312 |
| Effective Date | 12/01/2013 |

Horizontal Grid

This section lists improvements that bring users the best experience while working and customizing the Horizontal Grid.

Note: Horizontal grid options resemble Flo grid options.

Resizing Horizontal Grids

This feature allows adjusting the size of columns on the horizontal grid by dragging the boundary of the columns. This lets users view the content of the column in its entirety and minimize other columns.

PATIENT...

INSURANCE DETAILS

835 DET...

▼

MS

Marley Septimus

"custom field" (age, gender, etc.)

Primary Insurance ^

Health Plan Name

BDVS OF IN- MPJ12

Policy Number

ZXC1235456547

Balance

\$ 6,123.40

Receivable ID

4341312312

Effective Date

12/01/2013

Authorization Number

N/A

Group Number

52341

Secondary Insurance ^

TRANSACTION HISTORY

ACCOUNT...

PAYER P...

RECCOM...

▼

Overpayment Adjustments

\$ 571,000.00

\$ 871,000.00

-\$ 300,000.00

WO Adjustments

\$ 571,000.00

\$ 871,000.00

-\$ 300,000.00

Other Adjustments

\$ 571,000.00

\$ 871,000.00

-\$ 300,000.00

Transactions Listing ^

⚙

Txn Cat

Txn Date

Amount

Txn Ins Plan

Total

\$ 9,832.00

CA Auto

02/04/2021

-\$ 7,532.00

BDVS OF IN- MP.

CA Auto

02/04/2021

-\$ 212.00

BDVS OF IN- MP.

CA Auto

02/04/2021

-\$2,387.00

BDVS OF IN- MP.

CA Auto

02/04/2021

\$ 122.00

BDVS OF IN- MP.

Sorting Grids

This feature allows users to sort content in the grid by sorting content in a column. This allows users to arrange information in a way that helps them see critical data immediately. To sort the column, click the grid header.

| HP Adjustments ^ | | | |
|-------------------------|---------------|---------------|----------------|
| Adjustments | Actual ↓↑ | Expected | Variance |
| Total | \$ 571,000.00 | \$ 871,000.00 | -\$ 300,000.00 |
| Overpayment Adjustments | \$ 92,000.00 | \$ 92,000.00 | \$ 0.00 |
| Contractual Adjustments | \$ 101,000.00 | \$ 102,000.00 | -\$ 1,000.00 |
| WO Adjustments | \$ 104,000.00 | \$ 120,000.00 | -\$ 16,000.00 |
| Other | \$ 140,000.00 | \$ 140,000.00 | \$ 0.00 |

Grid Options

This feature allows users to configure the grid by:

- Highlighting even rows to help users navigate in the grid while scrolling, searching, etc.
- Showing filters box. This feature is similar to the Flo filters except that in Card View users can hide filters to free the columns space. For details on filtering, refer to the section [Filtering Grids](#).
- Specifying which columns to display in the grid. This feature lets users hide certain columns and work only with the columns that users need for the task at hand.
- Reordering the grid columns. This lets users group content in a more relevant way.

Transactions Listing Grid Option

☒ Highlight even rows
☒ Show filters

Columns Visibility and Order ☐ Show All

Search by name 🔍

☒ Txn Date ⋮
☒ Txn Cat ⋮
☒ Amount ⋮
☐ Txn Ins Plan ⋮
☒ Txn Payer ⋮
☒ Post Date ⋮

Save Cancel

To open the Grid Options dialog box, click the button in the top right corner of the grid.

| ⋮ Transactions Listing ^ ⚙️ | | | |
|--|------------|--------------------|-----------------|
| Txn Cat | Txn Date | Amount | Txn Ins Plan |
| Total | | \$ 9,832.00 | |
| CA Auto | 02/04/2021 | -\$ 7,532.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 212.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 2,387.00 | BDVS OF IN- MP. |

Filtering Grids

Data in the grid can be filtered using the filtering options displayed in the column header. This option lets users find certain content and filter out the rest of the information.

| Transactions Listing ^ | | | |
|------------------------|---------|--------------------|-----------------|
| Txn Date | Txn Cat | Amount | Txn Payer |
| MM/DD/YYYY | | | |
| Total | | \$ 9,832.00 | |
| 02/04/2021 | CA Auto | -\$ 7,532.00 | BDVS OF IN - EN |
| 02/04/2021 | CA Auto | -\$ 212.00 | BDVS OF IN - EN |

Filter boxes can include configurations for dates, free text, or filter selections depending on the filter type.

To add the filtering options, click the Grid Option button in the top right corner of the grid and then select the **Show Filters** check box.

Note: In Flo, users cannot hide these filters through the Grid Option.

For details on all the filtering options, refer to the CardView user guide.

Dragging Columns

This feature allows users to reorder columns in the grid by dragging them. This customization lets users compare values and rearrange content to meet the tasks at hand.

Note: You can also reorder columns from the Grid Option menu. For details, refer to the section [Grid Options](#).

| Transactions Listing ^ | | | |
|------------------------|-------------|--------------|-----------------|
| Txn Cat | Txn Date | | Txn Ins Plan |
| Total | \$ 9,832.00 | \$ 9,832.00 | |
| CA Auto | 02/04/2021 | -\$ 7,532.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 212.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 2,387.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | \$ 132.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 2,387.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | \$ 132.00 | BDVS OF IN- MP. |
| CA Auto | 02/04/2021 | -\$ 2,387.00 | BDVS OF IN- MP. |

Pinning Columns

This feature allows users to pin a grid column which helps in navigating the grid once you begin scrolling the grid left and right.

| Transactions Listing ^ | | | |
|------------------------|---------|--------------|-----------------|
| Txn Date | Txn Cat | Amount | Txn Ins Plan |
| Total | | \$ 9,832.00 | |
| 02/04/2021 | CA Auto | -\$ 7,532.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | -\$ 212.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | -\$ 2,387.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | \$ 132.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | -\$ 2,387.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | \$ 132.00 | BDVS OF IN- MP. |
| 02/04/2021 | CA Auto | -\$ 2,387.00 | BDVS OF IN- MP. |

Dragging Widgets

This feature allows users to change the location of the grid widget within the panel by dragging it.

| Total HP Payments ^ | | | |
|---------------------|--------|-------------|----------------|
| Payments | Actual | Expected | Variance |
| Total | | \$ 7,351.02 | -\$ 300,000.00 |

| HP Adjustments ^ | | | |
|-------------------------|---------------|---------------|----------------|
| Adjustments | Actual | Expected | Variance |
| Total | \$ 571,000.00 | \$ 871,000.00 | -\$ 300,000.00 |
| Contractual Adjustments | \$ 101,000.00 | \$ 102,000.00 | -\$ 1,000.00 |
| Overpayment Adjustments | \$ 92,000.00 | \$ 92,000.00 | \$ 0.00 |

Multi-Grid Scrolling

This feature allows users to scroll through each separate grid or the entire panel that may include many grids. This helps users navigate and scroll through the widgets faster.

| TRANSACTION HISTORY | | ACCOUN... | 835 DET... | PBAR/M... | ▼ |
|--|------------|-------------|-------------|----------------|---|
| CA Auto | 02/04/2021 | | \$ 132.00 | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | | -\$2,387.00 | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | | \$ 132.00 | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | | -\$2,387.00 | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | | -\$ 212.00 | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | | -\$2,387.00 | BDVS OF IN- MP | |
| <div> <div>⋮ Block 3 ^</div> <div>⚙</div> </div> | | | | | |
| Txn Cat | Txn Date | Amount | | Txn Ins Plan | |
| CA Auto | 02/04/2021 | \$ 132.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | -\$2,387.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | -\$ 212.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | -\$2,387.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | \$ 132.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | -\$2,387.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | \$ 132.00 | | BDVS OF IN- MP | |
| CA Auto | 02/04/2021 | -\$2,387.00 | | BDVS OF IN- MP | |

Collapsing/Expanding Widgets

This feature allows users to collapse and expand widgets by clicking the up/down arrow buttons. This functionality helps hide unneeded grid content.

| <div> <div>Block 1</div> <div>▼</div> <div></div> </div> | | | |
|--|------------|--------------|-----------------|
| <div> <div>Block 2</div> <div>▲</div> <div></div> </div> | | | |
| Txn Cat | Txn Date | Amount | Txn Ins Plan |
| Total | | \$ 9,832.00 | |
| CA Auto | 02/04/2021 | -\$ 7,532.00 | BDVS OF IN- MP. |

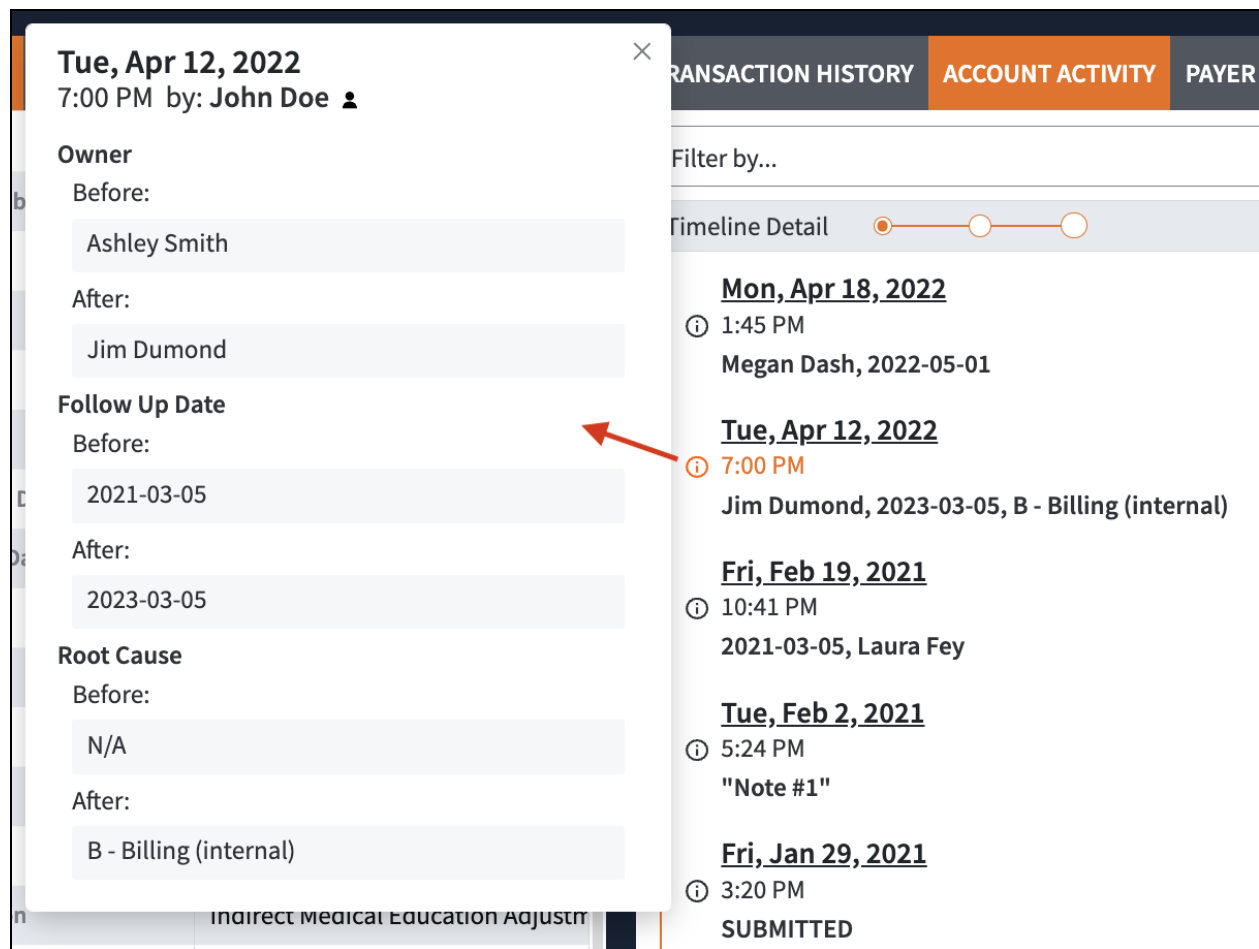
Links to Additional Accounts

This feature allows users to drill down to additional Card View accounts by clicking the account number in the grid. This option lets users view other accounts without the need to return to the FLO grid.

| <div> <div>Additional accounts</div> <div>▲</div> <div></div> </div> | | |
|--|----------------------|----------------------|
| Acc Num | MRN | Facility Name |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Total | | |
| AN1234556789012 | 100242134 | Lipshutz Clinic |

Displaying Detailed Card in Account Activity

The detailed card dialog window displayed in the Account Activity tab on Summary Card View has been repositioned to avoid overlapping the Timeline Detail elements when users want to view all the information.



Restoring Default Layouts

This feature allows users to restore the Card View user interface to its default state.

Secondary Insurance ^

| | |
|------------------|-----|
| Health Plan Name | N/A |
| Policy Number | N/A |
| Balance | |
| Receivable ID | N/A |

Restore default layout

User Custom Configuration

Each change a user makes in Card View is saved as the user's custom preference.

This feature allows users to save customizations across all instances of one CardView.

Note: Customizations will not apply when a user opens a different CardView. These custom preferences are associated exclusively with the user who set them.

For details on CardView customizations that a user can save as custom preferences, refer to the CardView user guide.

Action Panel and Account Activity Synchronization

Now work-item history on the Account Activity tab is updated immediately after the user updates and saves the Action Panel. The user does not need to reload the page to view changes made to the account.

| TRANSACTION HISTORY | ACCOUNT ACTIVITY | PAYER PORTAL MESSAGE | ACTION PANEL | FORMS |
|--|------------------|----------------------|--|-------|
| Filter by... Download Timeline Detail New-Old Old-New | | | | |
| Tue, Apr 12, 2022 7:00 PM by: Owner <div>Jim Dumond</div> Follow Up Date 2023-03-05 Root Cause B - Billing (internal) | | | Flo Status * SR: CLAIM BILLED/REBILLED Flo Disposition * SUBMITTED Flo Primary Segment * High Dollar Follow Up Flo Owner * <div>Jim Dumond</div> Assignee * | |

Closing Right Section

This feature allows users to close the right-side section to allow more space for the middle section. This feature is available regardless of the number of tabs in the section.

| S | PBAR/MS4 NOT... | ACTION PANEL | FORMS |
|-------------------------------------|-----------------|--------------------------------------|--------------|
| Total Balance \$ 446.61 | | Collection FLO Status Denied | <div>×</div> |
| Variance \$1.00 -\$ 30,000.00 | | Action Panel Segment Test | |
| | | Collection FLO Disposition Select | |
| | | Owner | |

As a result, the user hides unnecessary sections to expand the working area.

| ACCOUNT DETAILS | | ADDITIONAL ACCOUNTS | | | | | | |
|---|-----------------|-----------------------|---------------|-----------------|---------------|--------------|-------------------------|---|
| MS Marley Septimus "custom field" (age, gender, etc.) | | 845 Adjustments ^ | | | | | | |
| Pt Name | Marley Septimus | Most Recent... | Remit Date | Claim ICN | Payer | Amount | Claim Adjusmt... | Reason Descr... |
| Acc Number | AN1234556135212 | | MM/DD/YYYY #P | | | | | |
| Facility Name | Lipshutz Clinic | Total | | | | | | |
| Age by Discharge | 56 | | | | | \$ 70,351.02 | | |
| Discharge Date | 12/01/2013 | Y | 11/07/2019 | CLM1234567 | Hanna Medical | \$ 11,000.00 | Contractual Obligations | Claim/service lacks information which is for adjudication |
| Final Bill Date | 12/01/2013 | Y | 11/07/2019 | CLM1234567 | Hanna Medical | \$ 11,000.00 | Contractual Obligations | Claim/service lacks information which is for adjudication |
| Last Pmt Date | 12/05/2013 | Y | 11/07/2019 | CLM1234567 | Hanna Medical | \$ 11,000.00 | Contractual Obligations | Claim/service lacks information which is for adjudication |
| Collection Segment | 0 | Additional accounts ^ | | | | | | |
| Current Payer Group | | Acc Num | MRN | Facility Name | Pt Type | Admit Date | Discharge Date | Final Bill Date |
| Orig Payer Group | FSAE | | | | | | | |
| Current Balance | \$ 0.00 | Total | | | | | | |
| Current Pt Balance | \$ 0.00 | | | | | | | |
| Expected Reimb | | AN1234556789012 | 100242134 | Lipshutz Clinic | Outpatient | 11/07/2019 | 11/07/2019 | 11/12/2019 |
| Total Adjustments | \$ 0.00 | AN1234556781352 | 100242134 | Lipshutz Clinic | Outpatient | 11/08/2019 | 11/08/2019 | 11/16/2019 |
| Total Chg | \$ 0.00 | | | | | | | |

Showing Rules Reprocessing Notifications

This feature allows users to see notifications about rules reprocessing in all opened tabs including Summary Card View and Forms.

TRANSACTION HISTORY

ACCOUNT ACTIVITY

PAYER PORTAL MESSAGE

| | | | | |
|---------------|--|----------------|----------------|-----------------|
| TOTAL CHARGES | | TOTAL PAYMENTS | | ACCOUNT BALANCE |
| \$ 319,156.57 | | \$ 1,000.00 | | \$ 292,858.10 |
| | | EXPECTED | VARIANCE | |
| | | \$ 293,858.10 | -\$ 292,858.10 | |

TOTAL PATIENT PAYMENTS

| | | | |
|------------------------|-----------|----------|-----------|
| Total Patient Pay... | ACTUAL | Expected | Variance |
| | \$ 100.00 | 0 | \$ 100.00 |
| Total Patient Payments | \$ 100.00 | 0 | \$ 100.00 |

ACTION PA

Work is currently being redistributed in Flo and could affect application performance.

Flo Status

QSOLP: ONLINE WEB STATUS

Flo Disposition *

PENDING

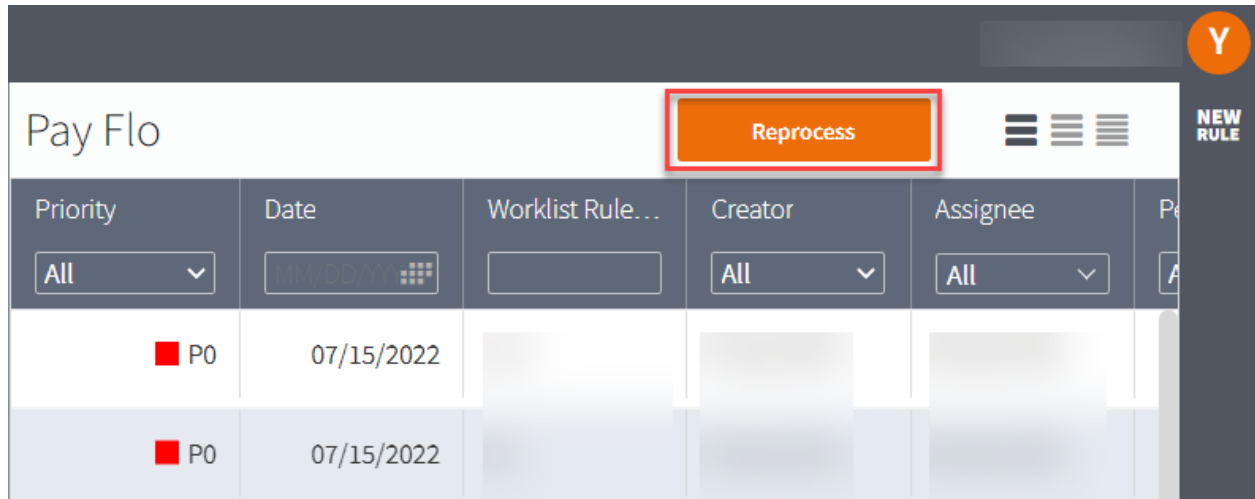
Flo Primary Segment *

High Dollar Follow Up

Flo Owner *

Denys Malyshev

Next



We hope you enjoy the new improvements!

You can always let VisiQuate know your feedback at support@visiquate.com.