



# **IMWEMR**

Release Notes

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Release, Version 1.0.0

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## **1. OVERVIEW**

This document contains important information about IMWEMR Version. This content reflects the series of enhancements and changes made to the system for this release.

## SETTINGS

**Locked users on Send To List** - Any user that is locked via Settings > Admin > Users > Lock button, will no longer display under the list of users who can be sent a message going forward.

PROVIDER	Search...	Active	TYPE	USER GROUP	DEFAULT FACILITY	COLOR	PASSWORD	LOCK/UNLOCK
			Physician	Physicians	Toms River		<button>Reset Password</button>	<button>Lock</button>
			Physician	Physicians	Brick		<button>Reset Password</button>	<button>Lock</button>
AProv, Priv			Staff	Technicians	Brick		<button>Reset Password</button>	<button>Lock</button>
Assist, Suite 200			Facility	N/A			<button>Reset Password</button>	<button>Lock</button>
Bonsell, Chris			Physician	Physicians	Brick		<button>Reset Password</button>	<button>Lock</button>
Boher, Dave			Physician	Physicians			<button>Reset Password</button>	<button>Lock</button>
			Physician	Physicians	Toms River		<button>Reset Password</button>	<button>Lock</button>
			Physician	Physicians	Toms River		<button>Reset Password</button>	<button>Lock</button>
			Physician	N/A			<button>Reset Password</button>	<button>Lock</button>
			Physician	Physicians	Brick		<button>Reset Password</button>	<button>Lock</button>
Doctor, Allscripts			Physician	Physicians			<button>Reset Password</button>	<button>Lock</button>
Doe, Smith			Scribe	Physicians			<button>Reset Password</button>	<button>Un Lock</button>
doe, qa			Physician	Physicians			<button>Reset Password</button>	<button>Lock</button>
Dr, Whiting			Facility	N/A			<button>Reset Password</button>	<button>Lock</button>
Dr, Davis			Facility	N/A			<button>Reset Password</button>	<button>Lock</button>
Ellis, Sue			Staff	Physicians			<button>Reset Password</button>	<button>Lock</button>
Fotos, Chris			Physician	Physicians			<button>Reset Password</button>	<button>Un Lock</button>
Glueck, Stephanie			Physician	Physicians			<button>Reset Password</button>	<button>Lock</button>

Those users will no longer display on the Send To, list for messages/tasks.

New Message/ Task

<input type="checkbox"/> Urgent	<input checked="" type="checkbox"/> Patient Verbal Communication																		
Send To	Nothing selected																		
Delivery Date	<input type="text"/>																		
Patient	<input type="text"/> Select All   Deselect All																		
Subject	Devqa, Imwqa Doctor, Allscripts Doctor, IMW Test Doe, Qa Dr, Davis Dr, Whiting Ellis, Sue Glueck, Stephanie																		
Message	<input type="button" value="Close"/>																		
	<table><tr><td>Name:</td><td>Smith, AA031 - 70471</td><td><input type="button" value="X"/></td></tr><tr><td>Gender:</td><td>Male</td><td>DOB: 10-06-1954</td></tr><tr><td>Address:</td><td colspan="2">123 Fake Street Freehold, NJ - 07728</td></tr><tr><td>Home:</td><td>732-444-1886</td><td>Work:</td></tr><tr><td>Cell:</td><td></td><td>Email:</td></tr><tr><td>Appt:</td><td colspan="2">BA / 08-10-2020 09:40 AM / Brick</td></tr></table>	Name:	Smith, AA031 - 70471	<input type="button" value="X"/>	Gender:	Male	DOB: 10-06-1954	Address:	123 Fake Street Freehold, NJ - 07728		Home:	732-444-1886	Work:	Cell:		Email:	Appt:	BA / 08-10-2020 09:40 AM / Brick	
Name:	Smith, AA031 - 70471	<input type="button" value="X"/>																	
Gender:	Male	DOB: 10-06-1954																	
Address:	123 Fake Street Freehold, NJ - 07728																		
Home:	732-444-1886	Work:																	
Cell:		Email:																	
Appt:	BA / 08-10-2020 09:40 AM / Brick																		
	<input type="button" value="Send Message"/>																		

**SCHEDULER - Max% on templates** - To warn the user when the maximum percentage of allowed appointments have been reached for a Schedule Template, a new setting within the Schedule template has been introduced. This is defined under Settings > Scheduler > Schedule Template > select Template. From here you can define at what percentage would an alert be shown.

The screenshot shows the 'SCHEDULE TEMPLATE' dialog box. At the top, there are fields for 'Template Name' (set to 'All Day & Evening'), 'Appts.' (Min. 0, Max. 10), and 'TEMPLATE TIMINGS' (From 08:00 AM, To 08:00 PM). A red box highlights the 'Show warning at Max%' field, which is set to '50'. Below this, a grid displays appointment slots from 08:00 AM to 09:00 AM. The first slot at 08:00 AM is labeled 'M 08 AM' and contains 'M 50'. The second slot at 09:00 AM is labeled 'M 09 AM' and contains 'M 10'. The legend at the bottom indicates that brown squares represent 'Mandatory' and teal squares represent 'Informative'. Buttons at the bottom right include 'Add Another Version', 'Save' (green), and 'Close' (red).

In these times, generally there is no scope to have a full schedule and this feature would allow the Practice to limit the number of patients and at the same time work with the same template they had before. The template Max % would over-ride what has been set for the Physician under their Setting > Admin > User > max.

The other thing to note for the Max% is that it will calculate based on Max. appointments as defined on the Template. If the Max number is an odd number, say 11, and the Max% is 50%, the warning would show when booking the 6<sup>th</sup> appointment on the template.

The user needs to refresh the Schedule template for this to work.

**Selecting multiple Providers and Locations on Waitlist** - Any waitlist appointment created by going to Scheduler > First Available > Add New, then selecting Multiple Providers and Locations the user would be able to look for this patient even if filtered under one or more Provider/Locations.

The appointment though, when created, would have to be deleted manually.

**Provider Revenue Report** - Not all providers would be able to view the financial data of other Providers for this report. A new privilege for the Provider Revenue Report has been created, this new privilege is called "View all provider's financials".

For Users with Provider Groups (Physician, Nurse, Technician); if the View all provider's financials box is checked off, the user should be able to see all providers listed on the reports. If this is unchecked, then they should only see themselves as an option on the Provider's list.

For other User groups, once this privilege is unchecked, a list of Providers will be displayed for the user to check off the people for whom the User can see the report. All Providers checked off would only be visible for the User on reports.

The screenshot shows the 'Edit New Record' window for a provider. The 'PRIVILEGES' section is highlighted with a red box. It contains a checkbox labeled 'View all provider's financials' and a dropdown menu labeled 'Providers' which currently displays 'Nothing selected'. Other sections include 'ID INFORMATION' (with fields for NPI#, Taxonomy ID, UPIN#, etc.), 'SCHEDULER' (with a dropdown for facilities and an 'Enable' checkbox), and a 'Save' button at the bottom.

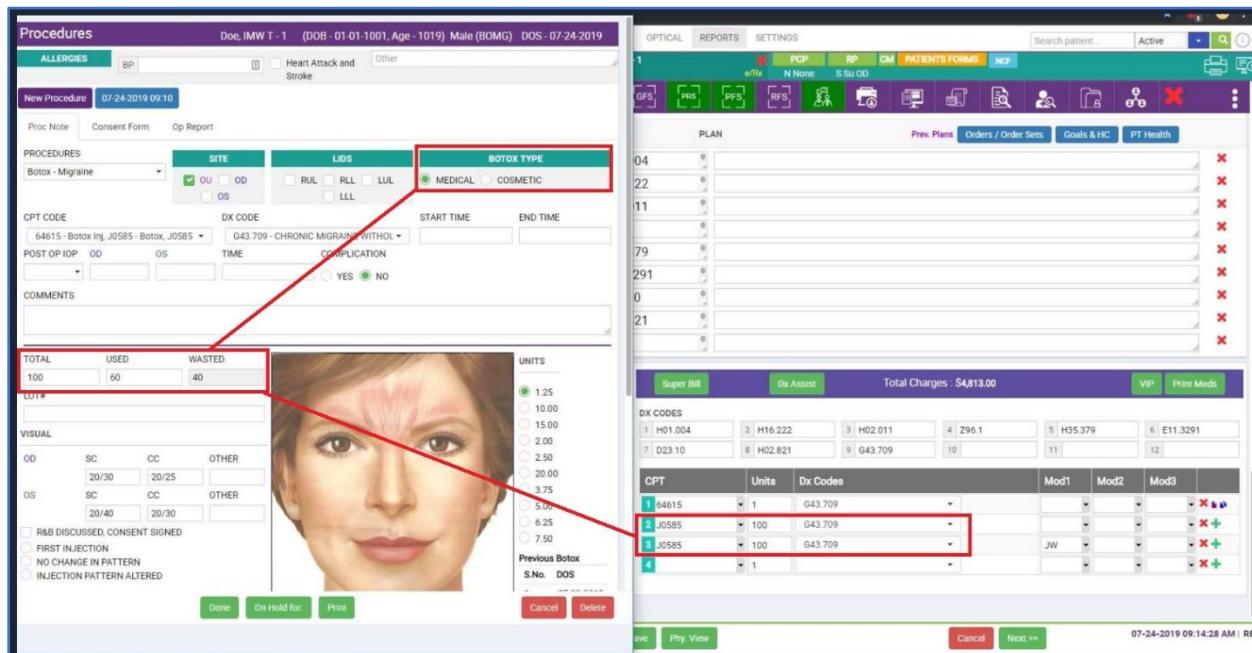
By default, this needs to be un-checked for all users, it is up to the Practice to limit this for any user they feel it must be limited for.

## CLINICAL

**Workview > Procedures > Botox** setup is slightly different now on the screen with new logic. This is to allow for both Medical and Cosmetic procedures to be billed properly. We can now calculate the wasted amount based on what was used for the procedure and this will be billed correctly based on the procedure designation (Medical | Cosmetic).

If the Medical procedure is checked; when the Units are entered and the amount "used" is entered, the "wasted" amount will automatically calculate. The system will establish the multiple J-codes to be used for the billing – with the second line showing the J0585 -JW – which is the code for the wasted materials.

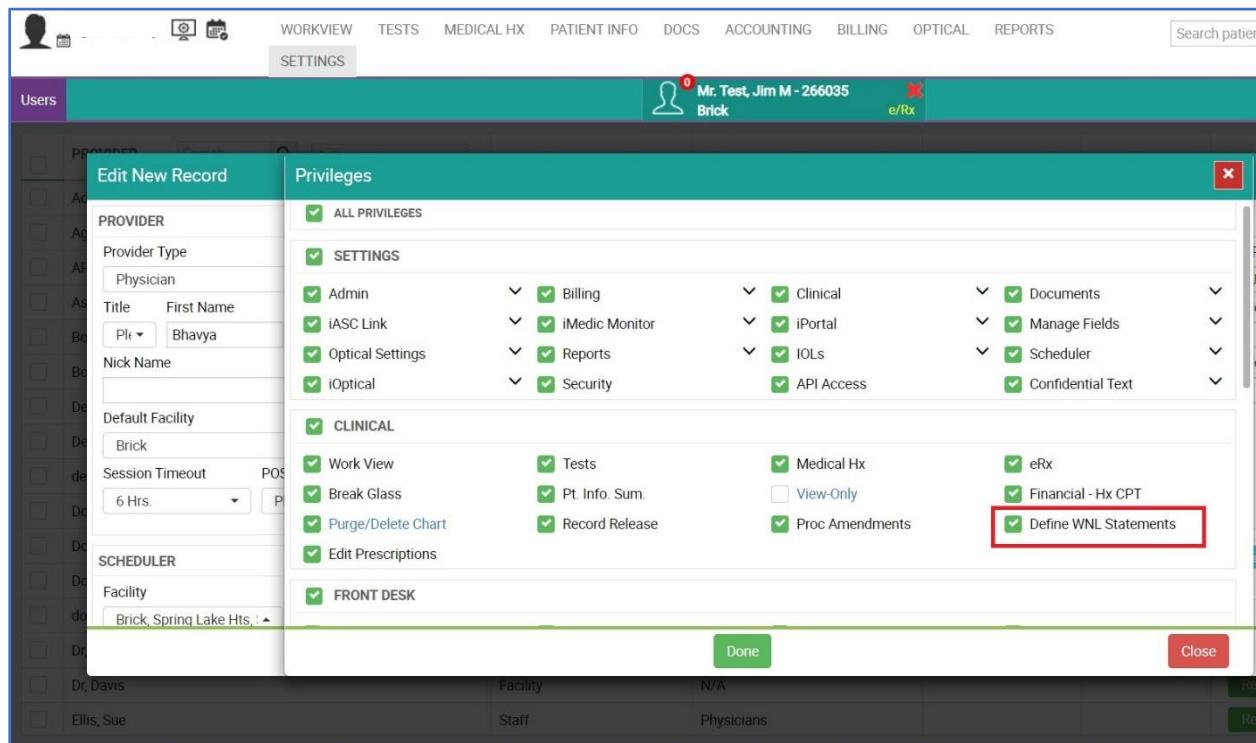
In the case of a Cosmetic procedure the units will still calculate based on the amount used and wasted but in this case the J code line item with modifier will not be applied for the billing because the units can be reused for a cosmetic procedure and therefore there is only a single J code line item.



## WNL – Logic Change

Defining “Within Normal Limits” logic has changed in order to provide a more robust setup process and to more easily manage the normal statements for different providers within a practice. The logic changed to first have it be a “privilege based” function. For instance, a super user of the system would be the only person who can change, modify or create the normal statements for the individual providers. By establishing this as a privilege then the management of all these statements can be done by a single person from one single screen and location.

**Privilege Settings** - Settings > Admin > User > Select Provider > Privileges. This will display the screen to edit the users privileges and there is a new option “Define WNL Statement” – this allows proper permissions for that user to be able to go into the system to add, change, modify or delete the normal statements for one of many doctors.



Once the user has the proper privileges, they can access the system to enter the WNL statements for any provider.

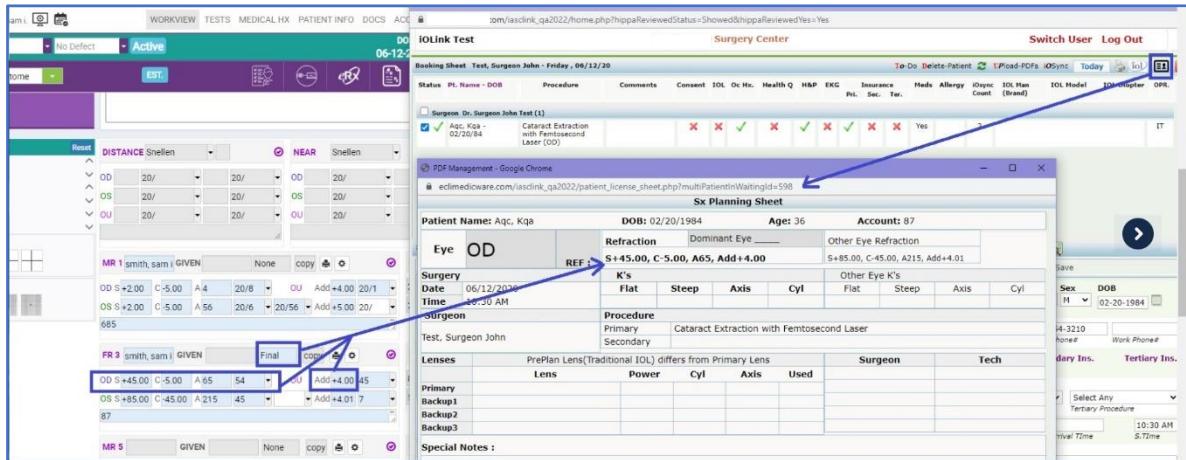
The above image shows three (3) new fields added to the screen.

- 1.) First new field “**Select Provider**” would be to enable the user to select a Provider who they wish to setup with the WNL statements. These would be specific for this user and managed independently by first selecting a provider. This would display the page and allow you to define ALL the sections as currently presented and SAVE.
- 2.) Once the statements are established for the single provider then the user would save these results. Once a provider values are established and saved then the user can use these to share and or copy to other providers.
- 3.) “**Copy to another Provider**” field can then be selected, and a different provider name is displayed. Once you have selected this name you can then copy the original providers WNL statements to the next doctor.
- 4.) Once the correct name is selected in both fields then the **COPY** button can be selected to transfer the values from the original provider to the selected provider. After selecting the COPY button, the **SAVE** button would also need to be selected to make these WNL statements now belong to the second provider and so on.
- 5.) After selecting the second providers name you can transfer the entire content from one doctor to the other. Once you have done this then you can modify, change, add or delete the content to be specific for the second doctor and **SAVE** then repeat as needed based on the number of providers in the clinic.

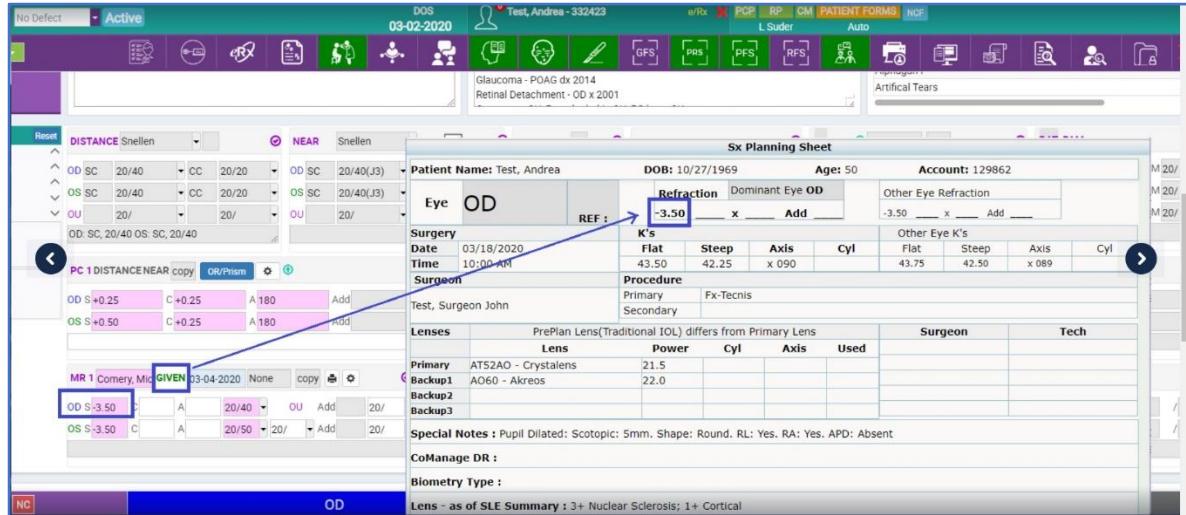
6.) Logic would be such that you can copy any established providers WNL to any other provider. This will streamline this process, give a single person the responsibility to manage all doctor WNL statements from a single screen and make the setup more straightforward and efficient and if changes or modifications need to be made down the road this will help and streamline any updates which might also be required.

**Refraction values displaying in Sx Plan** - When using the Sx Planning sheet there was a problem with the values pulling in from iDoc to the sheet and forwarding to iASC. The only values which should display on the sheet are either the Manifest Refraction (MR) designated either Final or Given. In each case when these values are completed on iDocs and the user selects the Sx Planning sheet under the box for Refraction the system should display the MR1 field so long as this is marked Final or Given.

## FINAL



## GIVEN



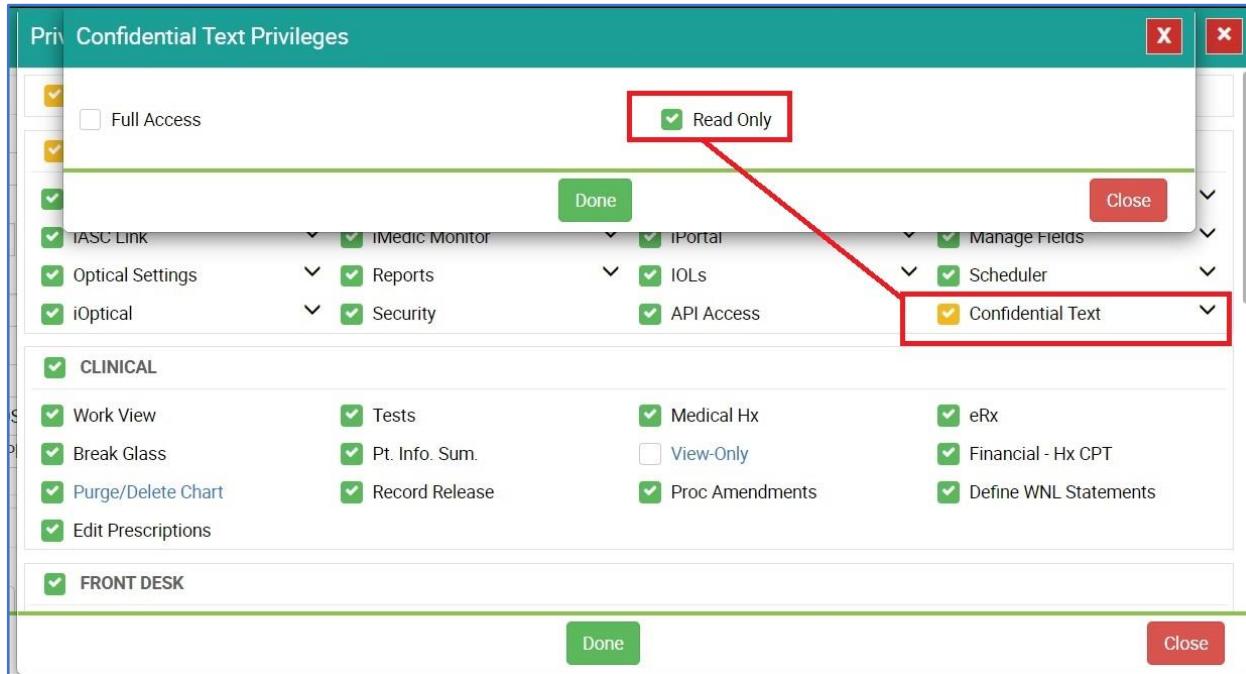
**Contact lens values not saving properly.** - The values for all fields are now saving properly as you move from Workview into CL Worksheet and vice versa.

The screenshot shows a 'Contact Lens' worksheet for patient 'Stevie Test - 266044'. The interface is divided into two main sections: 'OD' (left) and 'OS' (right). Both sections contain various input fields for lens parameters like 'Lens Type', 'Make', 'BC', 'Diameter', 'OZ (Optical Zone)', 'CT (Center Thickness)', 'Sphere/Power', 'Cylinder', 'Axis', 'Color', 'Add', 'DVA', 'DVA OU', 'NVA', and 'NVA OU'. Below these are sections for 'Over Refraction (DVA)' and 'Over Refraction (NVA)'. At the bottom are 'Save', 'Order', and 'Close' buttons.

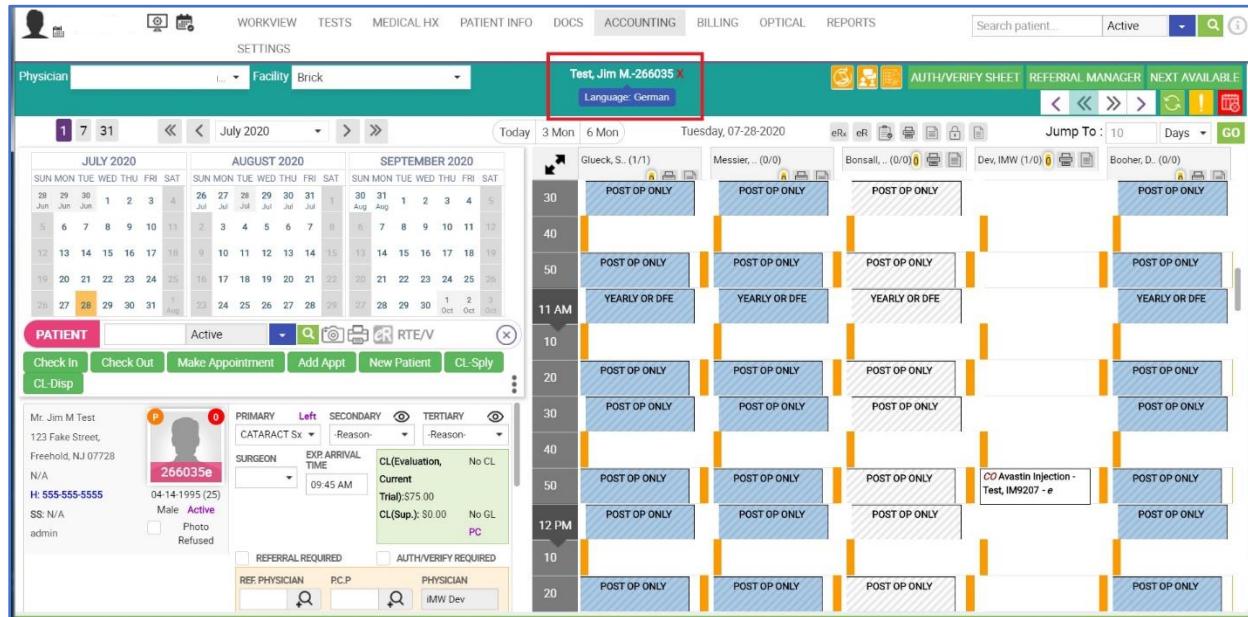
**Confidential Text** - The logic for the Confidential Text has changed to be controlled by the Privileges section of the system. There are two different statuses for this

The screenshot shows the 'Privileges' management interface. It lists various system modules with checkboxes for selecting privileges. A red box highlights the 'Confidential Text' checkbox under the 'Scheduler' category. Other categories include 'All Privileges', 'Settings', 'Clinical', 'Front Desk', and 'Front Desk' (repeated). Buttons at the bottom include 'Done' and 'Close'.

feature which are "FULL" access equals when the green checkbox is turned on and "READ ONLY" access equals when the yellow checkbox is turned on.

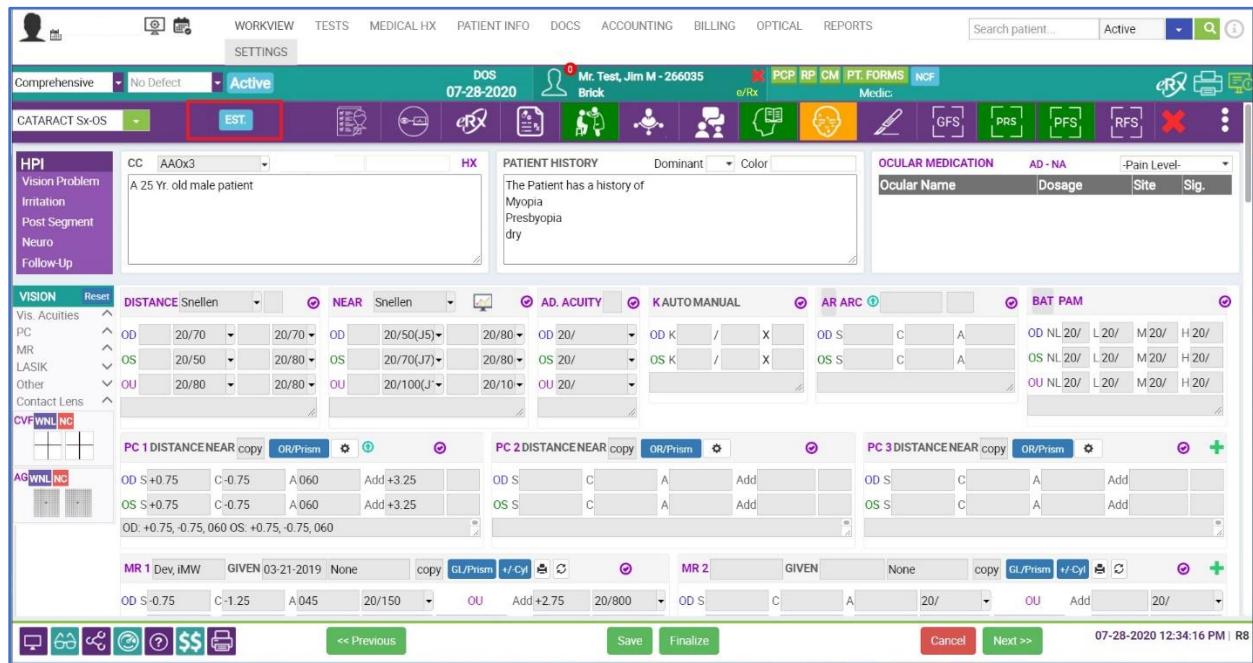


**Mini demographic hover** will now show the patient's nickname as well as the speaking language of the patient. This will display in a hover window on any screen that displays the Patient Name section.

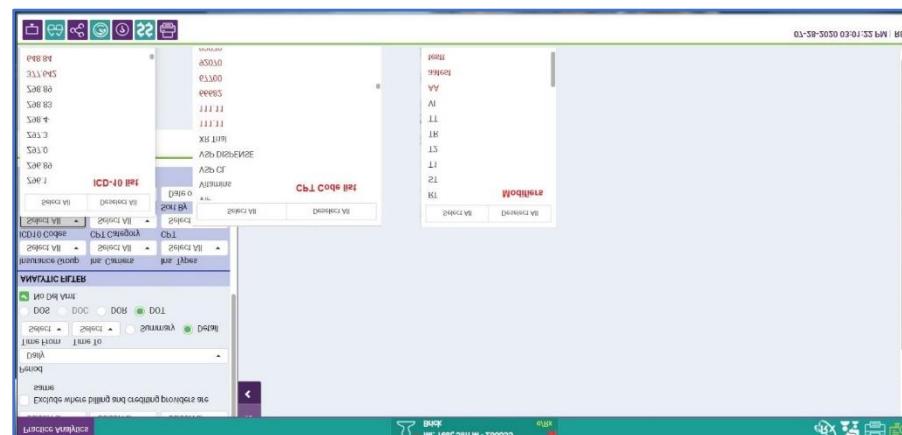


**New field added to Workview to indicate the patient status, i.e. NEW or EST.** This designation is determined by logic and will display the patient appropriately. If the patient has not been seen in the same practice for 3 years then the Establish will recalculate back to New.

Rule for AAPC: Three-year rule: The general rule **to** determine if a **patient** is “**new**” is that a previous, face-to-face service (if any) must have occurred at least three years from the date of service. Some payers may have different guidelines, such as using the month of their previous visit, instead of the day. Mar 8, 2018 AAPC.



**Drop Down list modified** – We have modified the logic on the drop-down lists to always show the newest or activated items on the top of the list in a black font. All older or deactivate items at the bottom of the list are now in a red font. This will save time when sorting through the list to find what you need to add into the chart by not having to scroll through discontinued items any longer.



**Secure Message Time** – We have fixed the time for both Sent Messages and Received Messages to ensure that they are both referencing the same clock in the system.

The screenshot shows the 'Patient Messages' screen. On the left is a sidebar with various icons and links: SMART A&P, e/Rx Inbox, Responsible Person, Tasks/Tests, Completed Tasks, Messages/Reminders, Tasks, Smart Phrases, Unfinalized Patients, Orders/Order Set, Forms & Letters, WNL/Chart Template, and Patient Messages (which is selected). The main area displays a list of 25 messages from July 28, 2020, to July 22, 2020. One message is highlighted in green: 'test item for verification' from MedicWareEye Associates at 03:15 PM. To the right of the list is a detailed view of a message from 'Test, Jim M. - 266035' at 07:28-2020 03:15 PM. The message content is 'This is to test the timing of the messages being sent and received.' Below the message is a 'Thank you' note. The top right of the screen has buttons for New Message, Inbox, Sent Messages, Notifications, and Print Message.

**Scrollbar Added** – We have added a scrollbar to the Financial Report section, this will allow you to see all reports from the screen.

The screenshot shows the 'REPORTS' tab in the financial report section. The left side contains clinical data: HPI (Vision Problem, Irritation, Post Segment, Neuro, Follow-Up), VISION (Vis. Acuities, PC, MR, LASIK, Other, Contact Lens), and OVF/WNL NC (Optical Acuity, Vision, Near Vision, Distance Vision). The center shows patient details: CC (AAOx3), HX (A 25 Yr. old male patient), and PHT (The Patient Myopia Presbyopia dry). The right side lists various financial reports under 'Financials' and 'OPTICAL' tabs, such as Practice Analytics, Provider Analytics, Provider Revenue, Referring Revenue, Facility Revenue, Deferred/VIP, Ledger, Insurance Analytics, CPT Analysis, Referring Physician, Allowable Verify, Credit Analysis, Deleted Payments, Patient Report, Modified Encounters, Yearly, Provider RVU, Ins Analytic - Aao Test, Transaction Details, Itemized Receipts, Procedure Payments, Cash Lag Analysis, Office Production, Cash Lag Analysis, and Cash Lag Analysis. A red vertical bar highlights the scrollbar on the right side of the report list.

**Social History modified** - we added two new checkboxes for Alcohol and Drug consumption. These new boxes have no effect on the MIPs measure and/or calculation. The logic remains the same as it has been.

The screenshot shows the 'Patient Medical History' section of a clinical software interface. On the left, a sidebar lists various medical history categories. The main area contains sections for 'PSYCHIATRY', 'RESPIRATORY', 'SOCIAL HISTORY', 'FAMILY HX OF SMOKING', and 'ALCOHOL AND DRUGS'. In the 'ALCOHOL AND DRUGS' section, there are two new checkboxes: 'Do you use alcohol?' and 'Do you use any drugs?'. Both checkboxes are checked and highlighted with a red box. The bottom right corner of the screen shows the date and time: '07-28-2020 12:52:01 PM | R8'.

**Medication Prescription (Manual) logic changed** – we have added new logic to manually create a Medication Prescription. This is now Privilege-based and has to be determined on a user by user basis. If you have the “Edit Prescriptions” (new option)

The screenshot shows the 'Edit New Record' dialog for a 'User' record. On the left, there are tabs for 'Edit New Record' and 'Privileges'. The 'Privileges' tab is active and displays a hierarchical list of privileges. A red arrow points from the text above to the 'Edit Prescriptions' checkbox, which is located under the 'CLINICAL' section. The 'Edit Prescriptions' checkbox is unchecked. Other checked checkboxes include 'Work View', 'Break Glass', 'Billing', 'iMedic Monitor', 'Reports', 'Security', 'Clinical', 'iPortal', 'IOls', 'API Access', 'Documents', 'Manage Fields', 'Scheduler', and 'Confidential Text'. The bottom right corner of the dialog shows the 'Done' button.

checked, then this would allow a user to write prescriptions. If the “Edit Prescriptions” is not checked then the feature is removed from the Workview drop-down window. If the practice changes the Edit Prescriptions privilege for a user to complete the activation of this, you must log out and then log back in.

**Fundus (Retina) Examination** – this area has been modified to follow the progression of the examination where the findings are laid out from macula to periphery. New menu choices are available as well to select a specific area or you can go to “retina exam” and this will have the findings re-organized more closely to the progression of the exam.

<b>Fundus</b> <span style="background-color: #e0e0ff; border: 1px solid black; padding: 2px;">WNL</span> <span style="background-color: #ffcc00; border: 1px solid black; padding: 2px;">NC</span>  C.D. <b>OD</b> <span style="border: 1px solid black; padding: 2px;"> </span> <b>OS</b> <span style="border: 1px solid black; padding: 2px;"> </span>  Optic Nerve Vitreous Macula Vessels Periphery <b>Retinal Exam</b> <span style="border: 1px solid black; padding: 2px;">Draw RT</span> <span style="border: 1px solid black; padding: 2px;">Draw ON</span> <span style="border: 1px solid black; padding: 2px;">Draw MA</span>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">Optic Nerve</th> <th style="text-align: left; padding: 2px;">Vitreous</th> <th style="text-align: left; padding: 2px;">Macula</th> <th style="text-align: left; padding: 2px;">Vessels</th> <th style="text-align: left; padding: 2px;">Periphery</th> <th style="text-align: left; padding: 2px; border: 2px solid red;">Retinal Exam</th> <th style="text-align: left; padding: 2px;">Draw RT</th> <th style="text-align: left; padding: 2px;">Draw ON</th> <th style="text-align: left; padding: 2px;">Draw</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Finalized</td> <td style="padding: 2px;"></td> <td style="padding: 2px;"></td> <td style="padding: 2px;"></td> <td style="padding: 2px;">Periphery not examined</td> <td style="padding: 2px; border: 2px solid red;">OD</td> <td style="padding: 2px;">Lens Used:</td> <td></td> <td></td> </tr> <tr> <td colspan="9" style="text-align: center; padding: 5px;"><b>OD</b></td> </tr> <tr> <td style="padding: 2px;">Macular edema</td> <td style="padding: 2px;">Absent</td> <td style="padding: 2px;">Focal</td> <td style="padding: 2px;">Diffuse</td> <td style="padding: 2px;">Cystoid</td> <td colspan="4" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Drusen</td> <td style="padding: 2px;">Absent</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">1+</td> <td style="padding: 2px;">2+</td> <td style="padding: 2px;">3+</td> <td style="padding: 2px;">4+</td> <td colspan="2" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;"> </td> <td style="padding: 2px;">F</td> <td style="padding: 2px;">PF</td> <td style="padding: 2px;">EF</td> <td style="padding: 2px;">Hard</td> <td colspan="4" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">AMD ▾</td> <td colspan="7" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">ERM</td> <td style="padding: 2px;">Absent</td> <td style="padding: 2px;">T</td> <td style="padding: 2px;">1+</td> <td style="padding: 2px;">2+</td> <td style="padding: 2px;">3+</td> <td style="padding: 2px;">4+</td> <td colspan="2" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;"> </td> <td colspan="2" style="padding: 2px;">Superotemporal</td> <td colspan="5" style="padding: 2px;">Inferotemporal</td> </tr> <tr> <td style="padding: 2px;"> </td> <td colspan="2" style="padding: 2px;">Superonasal</td> <td colspan="5" style="padding: 2px;">Inferonasal</td> </tr> <tr> <td style="padding: 2px;">Retinal Pigment Epithelial Detachment</td> <td style="padding: 2px;">Absent</td> <td colspan="7" style="padding: 2px;">Present</td> </tr> <tr> <td style="padding: 2px;">Cotton Wool Spot</td> <td style="padding: 2px;">Absent</td> <td colspan="2" style="padding: 2px;">Macula</td> <td colspan="5" style="padding: 2px;">Superotemporal</td> </tr> <tr> <td style="padding: 2px;"> </td> <td colspan="2" style="padding: 2px;">Inferotemporal</td> <td colspan="2" style="padding: 2px;">Superonasal</td> <td colspan="5" style="padding: 2px;">Inferonasal</td> </tr> <tr> <td style="padding: 2px;">Diabetes</td> <td colspan="8" style="padding: 2px;">No Retinopathy</td> </tr> <tr> <td style="padding: 2px;">DR ▾</td> <td colspan="8" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Vascular Occlusion ▾</td> <td colspan="8" style="padding: 2px;"></td> </tr> <tr> <td style="padding: 2px;">Vascular Sheathing</td> <td style="padding: 2px;"></td> <td style="padding: 2px;">Superotemporal</td> <td style="padding: 2px;">Inferotemporal</td> <td colspan="5" style="padding: 2px;"></td> </tr> </tbody> </table>	Optic Nerve	Vitreous	Macula	Vessels	Periphery	Retinal Exam	Draw RT	Draw ON	Draw	Finalized				Periphery not examined	OD	Lens Used:			<b>OD</b>									Macular edema	Absent	Focal	Diffuse	Cystoid					Drusen	Absent	T	1+	2+	3+	4+				F	PF	EF	Hard					AMD ▾								ERM	Absent	T	1+	2+	3+	4+				Superotemporal		Inferotemporal						Superonasal		Inferonasal					Retinal Pigment Epithelial Detachment	Absent	Present							Cotton Wool Spot	Absent	Macula		Superotemporal						Inferotemporal		Superonasal		Inferonasal					Diabetes	No Retinopathy								DR ▾									Vascular Occlusion ▾									Vascular Sheathing		Superotemporal	Inferotemporal					
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**IOP Tmax** – we have modified the IOP screen slightly and included the Tmax to be part of the GFS printout.

The screenshot shows the IOP (Gonioscopy) screen with several input fields and a red box highlighting the 'Tmax OD 28 OS 32' entry. A red arrow points from this entry to a red box on the right side of the screen, which displays a 'GLAUCOMA FLOW SHEET' for 'Mr. Jim Test M.' with the 'Tmax OD 28 OS 32' values highlighted. The right panel also includes sections for 'Initial', 'Risk Factors', and 'Warnings'.

**Print Patient Summary** – we have added the ability fax directly from this screen and create a new option.

The screenshot shows the 'Print Patient Record' screen for 'Test, Jim - 266035'. On the left, there are sections for 'CLINICAL SUMMARY', 'EXCLUSION', 'SUMMARY', and 'PATIENT INFORMATION'. At the bottom, there is a navigation bar with four buttons: 'Print', 'Send Fax' (highlighted with a red box), 'Fax Log', and 'Electronic'.

**H&P printing** – we have added the ability to complete the H&P in iDOC then print the results to a document and save to the appropriate folder in DOCS.

The screenshot shows the iDOC software interface. On the left, there's a sidebar with 'Patient Medical History' and a 'Review of Systems' section. The main area has tabs for 'ADVANCE DIRECTIVE', 'HISTORY AND PHYSICAL', and 'OCULAR SX/PROCEDURES'. The 'HISTORY AND PHYSICAL' tab is active, displaying a grid of symptoms and conditions with 'YES' and 'NO' checkboxes. A large list of symptoms is visible below the grid. The bottom right shows a date and time stamp: '07-30-2020 01:29:22 PM | R8'.

**Referral Worklist** – new features have been added in the screen to allow for better management and patient handling. The image and outline below highlight what the new features are and how they are implemented.

The screenshot shows the Referral Worklist screen with several annotations:

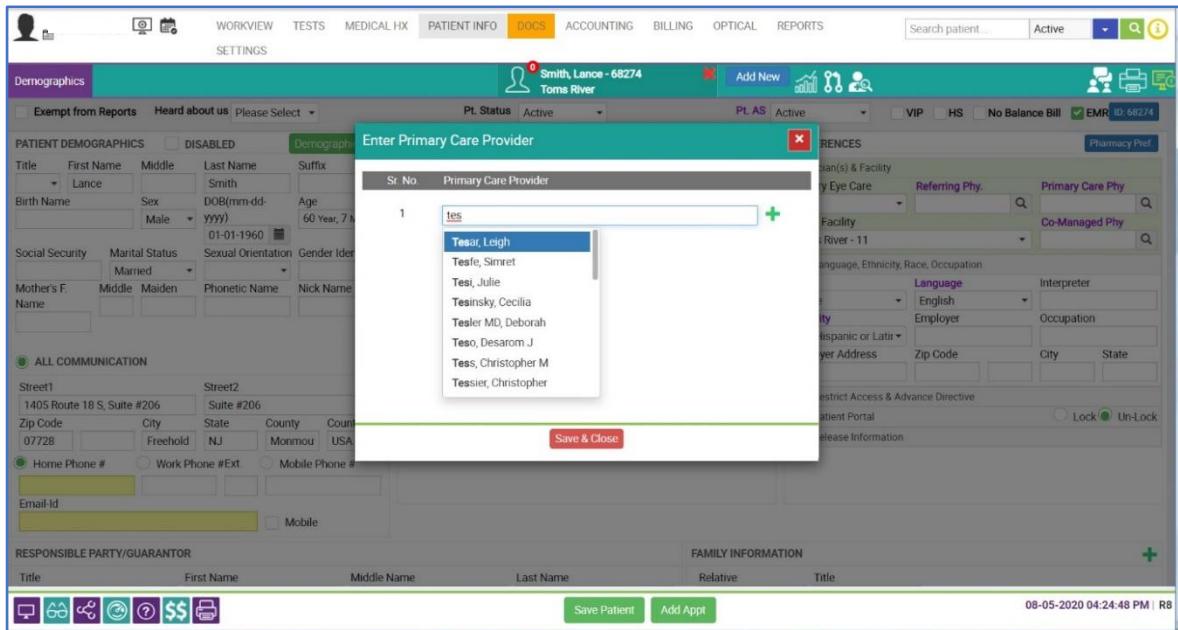
- An orange arrow points to the top header row, labeled "Freeze the header area outlined in ORANGE".
- A red arrow points to the 'REFERRING PHY PHONE#' column, labeled "The columns outlined in RED need to be able to sort the data in display".
- A green arrow points to the 'COMMENT' icon in the bottom right corner, labeled "Grey is the normal state for the EDIT icon" and "GREEN is the new state if a COMMENT was entered to report".

PT. NAME-ID	PRI. INS.	PROCEDURE	APPT. DATE & TIME	PHYSICIAN	PCP Active	PCP PHONE#	REFERRING PHY	REF PHY PHONE#	#OF REFERRALS	DATES	AUTHORIZATION	AUTH DATE
Boober, Dave L - 70053	Highmark Medicare	Office Visit	02-15-2020 11:00 AM	Gluck, Stephanie	Dev, IMW	555-555-9874	Helpdesk, iMW	555-555-4625	32165165	1/	07-08-2019	
Test, Greg - 70435	BCBS of California	Cataract Extraction with Femtosecond Laser	03-17-2020 10:05 AM	Test, Surgeon John	Smith, Adam	123-456-7890	Test, Bobby			1	00-00-0000	234324
Test, Everman - 266098	BCBS of California	New Patient	03-17-2020 07:20 AM	Test, Surgeon John	Bell, Kevin	908-226-9000	Dedona, Anna	214-748-3647			00-00-0000	
Test, Jim M - 266035	BCBS of California	ASCAN/FU	02-18-2020 09:35 AM	Dev, IMW	Dev, IMW	555-555-9874	Bell, Kevin	908-226-9000				

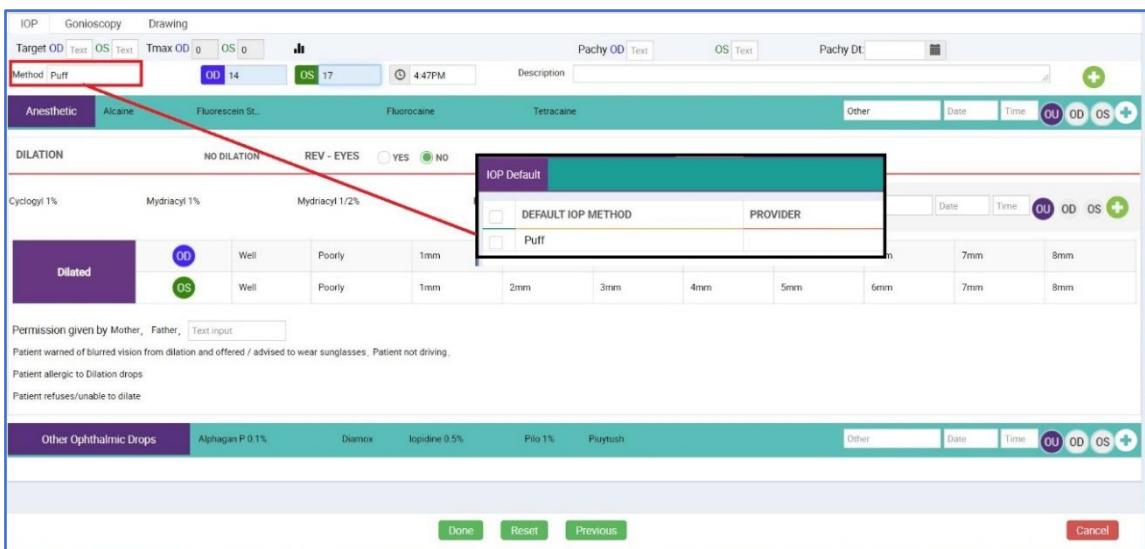
**CL Final Prescription** – we added the ability to have a new button, “Final CL”. When selected this will shift the sheet down and display the last final prescription same as the manifest refraction prescription.

**Glaucoma Flow Sheet** – we added the actual Workview findings to the Gonio section so the user can see the findings. We also added the ability to see the drawing. If DRAWING is red then there is a new drawing done for this date of service – selecting the button opens the drawing for review.

**Demographics field optimized** – we have added new logic to the PCP doctor field lookup. When selecting the Primary Care provider label; the pop-up to search for the doctor now has type ahead logic to make the search for a doctor easier.



**IOP method default** – we created a new setting to default the preferred IOP measurement method. For this you will go to Settings > Clinical > IOP Default and here you can establish the provider's preferred default type. To use this new feature simply go directly to the OD/OS fields and add the numbers – as you enter this info to the fields the default method will be applied.



**Dilation** – we added the ability to put different drugs in to each eye separately. If you do different dilation drops per eye this can now be accomplished in the system.

The screenshot shows a software interface for managing eye drops. At the top, there are tabs for IOP, Gonioscopy, Drawing, and various drop selection fields (Target OD/Test, OS/Test, Tmax OD/OS, Pachy OD/Test, Pachy Dt). Below these are sections for Anesthetic (Alcaine), Fluorescein St., Fluorocaine, Tetracaine, and Other. A 'DILATION' section is highlighted in red, showing 'NO DILATION' and 'REV - EYES YES' (radio button selected). Below this, two rows show drug selection: 'Cyclogyl 1%' and 'Mydriacyl 1%'. Each row has columns for drug name, concentration, and various parameters like Parameyd and Phenylephrine. At the bottom of the dilation section, there's a table for 'Dilated' status with columns for OD and OS, and rows for Well/Poorly and various pupil sizes (1mm to 8mm).

Below the dilation section, there's a note about permission given by Mother/Father, a warning about blurred vision, and information about allergies and refusal. Further down, there are sections for 'Other Ophthalmic Drops' (Alpinagan 0.1%, Diamox, Iodopine 0.5%, Pilo 1%, Pluslash) and 'Lens' (with icons for various lens types). At the bottom right, there are buttons for Done, Reset, Previous, Save, Finalize, Cancel, and Next >>, along with a timestamp (08-05-2020 05:38:21 PM | R8).

**Received Faxes** – You can now delete a fax from the Received Faxes pop-up. If you select the RED X then there will be a warning message that comes up to verify the deletion of the item selected.

The screenshot shows a pop-up window titled 'Received Fax Messages'. It contains a table with columns: DEL, SR.NO., DATE, FROM, FAX, FOLDER, and PATIENT SEARCH. The table lists 15 entries, each with a red 'X' icon in the first column. The last entry (SR.NO. 15) has a 'Delete' dropdown menu open, showing options: 'Delete', 'Delete & Recycle', and 'Delete & Recycle (Warning)'. At the bottom of the table are 'Allocate' and 'Close' buttons.

DEL	SR.NO.	DATE	FROM	FAX	FOLDER	PATIENT SEARCH
X	1	03-13-2020 09:10 AM	5096519937	fax-27955113.pdf	Please Select	<input type="text"/>
X	2	02-11-2020 07:39 AM	7328000314	fax-271122377.pdf	Please Select	<input type="text"/>
X	3	02-11-2020 07:37 AM	7328000314	fax-271122164.pdf	Please Select	<input type="text"/>
X	4	02-10-2020 04:27 AM	7328000302	fax-270747930.pdf	Please Select	<input type="text"/>
X	5	02-07-2020 07:08 AM	7328000302	fax-270344478.pdf	Please Select	<input type="text"/>
X	6	11-02-2019 06:12 AM	7328000302	fax-247066964.pdf	Please Select	<input type="text"/>
X	7	11-02-2019 06:10 AM	7328000302	fax-247066887.pdf	Please Select	<input type="text"/>
X	8	07-08-2019 07:46 AM	6312095120	fax-219005126.pdf	Please Select	<input type="text"/>
X	9	07-03-2019 07:14 AM	7328000314	fax-218368672.pdf	Please Select	<input type="text"/>
X	10	11-27-2018 05:04 AM	7324860676	fax-171675840.pdf	Please Select	<input type="text"/>
X	11	11-21-2018 07:38 AM	7324860676	fax-170968402.pdf	Please Select	<input type="text"/>
X	12	11-21-2018 07:38 AM	7324860676	fax-170968399.pdf	Please Select	<input type="text"/>
X	13	11-21-2018 07:38 AM	7324860676	fax-170968400.pdf	Please Select	<input type="text"/>
X	14	11-21-2018 07:19 AM	7324860676	fax-170967460.pdf	Please Select	<input type="text"/>
X	15	11-21-2018 07:10 AM	7324860676	fax-170967460.pdf	Please Select	<input type="text"/>

**Demographics Title** – we have made the Title field mandatory and added this to the list for Practice Fields – so this feature is selectable. Having the checkmark green would force the field to be completed within the Demographic area.

PATIENT INFORMATION

DEMOGRAPHICS	ADVISORY	MANDATORY	DEMOGRAPHICS	ADVISORY	MANDATORY	DEMOGRAPHICS	ADVISORY	MANDATORY
Heard about us	<input type="checkbox"/>	<input type="checkbox"/>	Home Phone#	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Work Phone#	<input type="checkbox"/>	<input type="checkbox"/>	DOB	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mobile Phone#	<input type="checkbox"/>	<input type="checkbox"/>	Marital Status	<input type="checkbox"/>	<input type="checkbox"/>
Street 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Facility	<input type="checkbox"/>	<input type="checkbox"/>	Emergency Contact Name	<input type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Driving License	<input type="checkbox"/>	<input type="checkbox"/>	Emergency Phone#	<input type="checkbox"/>	<input type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Pt. Portal Access	<input type="checkbox"/>	<input type="checkbox"/>	Created By	<input type="checkbox"/>	<input type="checkbox"/>
Zip Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Login id	<input type="checkbox"/>	<input type="checkbox"/>	Referring Physician	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Password	<input type="checkbox"/>	<input type="checkbox"/>	Sex	<input type="checkbox"/>	<input type="checkbox"/>
Provider	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Reenter Password	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Number	<input type="checkbox"/>	<input type="checkbox"/>

RESPONSIBLE PARTY

RESPONSIBLE PARTY	ADVISORY	MANDATORY	RESPONSIBLE PARTY	ADVISORY	MANDATORY	RESPONSIBLE PARTY	ADVISORY	MANDATORY
Name	<input type="checkbox"/>	<input type="checkbox"/>	DOB	<input type="checkbox"/>	<input type="checkbox"/>	Marital Status	<input type="checkbox"/>	<input type="checkbox"/>
Relation	<input type="checkbox"/>	<input type="checkbox"/>	Home Phone#	<input type="checkbox"/>	<input type="checkbox"/>	Driving License	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>	Work Phone#	<input type="checkbox"/>	<input type="checkbox"/>	City	<input type="checkbox"/>	<input type="checkbox"/>
Street 1	<input type="checkbox"/>	<input type="checkbox"/>	Mobile Phone#	<input type="checkbox"/>	<input type="checkbox"/>	State	<input type="checkbox"/>	<input type="checkbox"/>

Save 08-06-2020 01:09:37 PM | R8

**Tests area** – document names are now shown to understand what the file is that you are handling within the upload process. As the files are uploaded you will see the name associated to the file in the upper right corner.

WORKVIEW TESTS MEDICAL HX PATIENT INFO DOCS ACCOUNTING BILLING OPTICAL REPORTS Search patient... Active

VF Order By Order Date DOS 08-06-2020 SITES OU OD OS

Performed By Diagnosis Technician Comments

PATIENT UNDERSTANDING & COOPERATION GOOD FAIR POOR Preference Card -SELECT- PREVIOUS VALUES

PATIENT TESTS & LABS TEST DOCUMENTS

Right\_click\_patient\_pop\_up1596736\_right\_click\_patient\_pop\_up15967362093285.PNG

PATIENT INTERPRETATION

TEST RESULT	OD	GOOD	FAIR	POOR	OS	GOOD	FAIR	POOR		
	TAPED	UNTAPED			TAPED	UNTAPED				
	NORMAL	POOR STUDY			NORMAL	POOR STUDY				
Border Line Defect	T	+1	+2	+3	+4	T	+1	+2	+3	+4
Abnormal	T	+1	+2	+3	+4	T	+1	+2	+3	+4
Nasal Step	SUPERIOR T	+1	+2	+3	+4	SUPERIOR T	+1	+2	+3	+4
	INFERIOR T	+1	+2	+3	+4	INFERIOR T	+1	+2	+3	+4
Acute defect	SUPERIOR T	+1	+2	+3	+4	SUPERIOR T	+1	+2	+3	+4
	INFERIOR T	+1	+2	+3	+4	INFERIOR T	+1	+2	+3	+4
Defect	CENTRAL T	+1	+2	+3	+4	CENTRAL T	+1	+2	+3	+4
	NO SIG. CHANGE IMPROVED INC. ABN				NO SIG. IMPROVED INC. ABN					

Save 08-06-2020 01:54:49 PM | R8

**Referral and Authorization information** – we added the ability to directly access the referral and authorization sheet from the new ICON on the upper right section in the teal header area. Selecting this will open the Auth/Verify sheets from within Workview.

The screenshot shows the Workview software interface. At the top, there's a teal header bar with various icons and patient information (Test, Jim M - 266035, Brick). Below the header is a main form for a case (Case ID: 23459, Start Date: 03-18-2019, Status: Open). On the left, there are sections for Primary, Secondary, and Tertiary patients. The central part of the screen has two main sections highlighted with red boxes: 'REFERRAL CASE [MEDICAL-23459]' and 'AUTHORIZATION CASE [MEDICAL-23459]'. Both sections contain tables for Referral and Authorization details, respectively. At the bottom, there are several icons for file operations and a timestamp (08-06-2020 03:25:48 PM | R8).

**Secure Messages Attachments** – you can now attach a file to a secure message out to a patient. Files are limited to PDF, DOC, DOCx, Jpeg, PNG and the size is limited to 3 mb.

The screenshot shows the User Console interface. On the left, there's a sidebar with various menu items like SMART A&P, e/Rx Inbox, Responsible Person, Tasks/Tests, Completed Tasks, Messages/Reminders, Smart Phrases, Unfinalized Patients, Orders/Order Set, Forms & Letters, and WNL/Chart Template. The main area is titled 'Send Patient Message' and contains fields for 'To Patient' (radio button selected), 'Subject' (This is a test for attachments), and 'Message' (Hi please see your latest VF result attached). There are also checkboxes for 'Urgent Message' and 'Include Patient Communication'. At the bottom right of the message window are 'Send Message' and 'Close' buttons. The background shows a list of recent messages and notifications.

**Recall Procedures** – so long as a procedure is listed in a patient recall the procedure will be actively searched. Once deleted or retired from the Procedures master-list the procedure will remain in the recall list. To remove the retired procedure from the patient you will have to delete that procedure out of the patient list.

Procedure on Recall list but deleted from the Procedures masterlist.

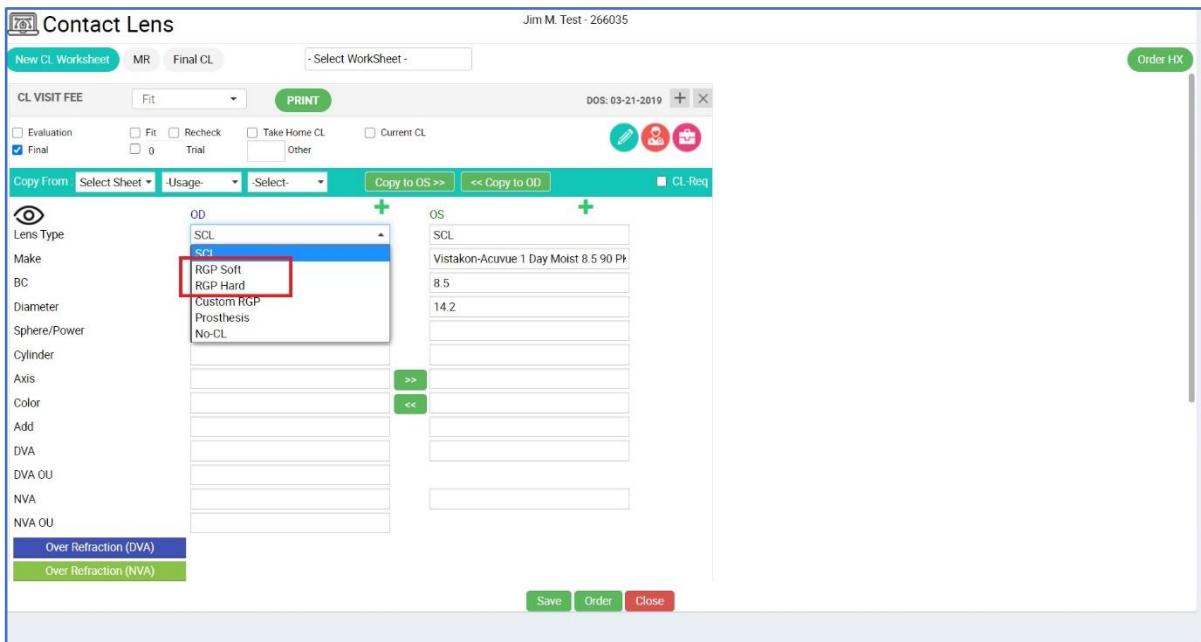
	Recall Date	Procedure	Facility	Description	Recall	Operator
<input type="checkbox"/>	05-06-2021	Cataract Extraction with Femtosecond Laser	Brick	test procedure	09 Months	BA
<input type="checkbox"/>	11-06-2020	Laser YAG Capsulotomy	Brick	test 2	03 Months	BA

**Consult Letter variable** – new variable is added to include the CPT code and up to 4 modifiers. This can be entered in the letter and it will merge whatever is entered from the Workview superbill.

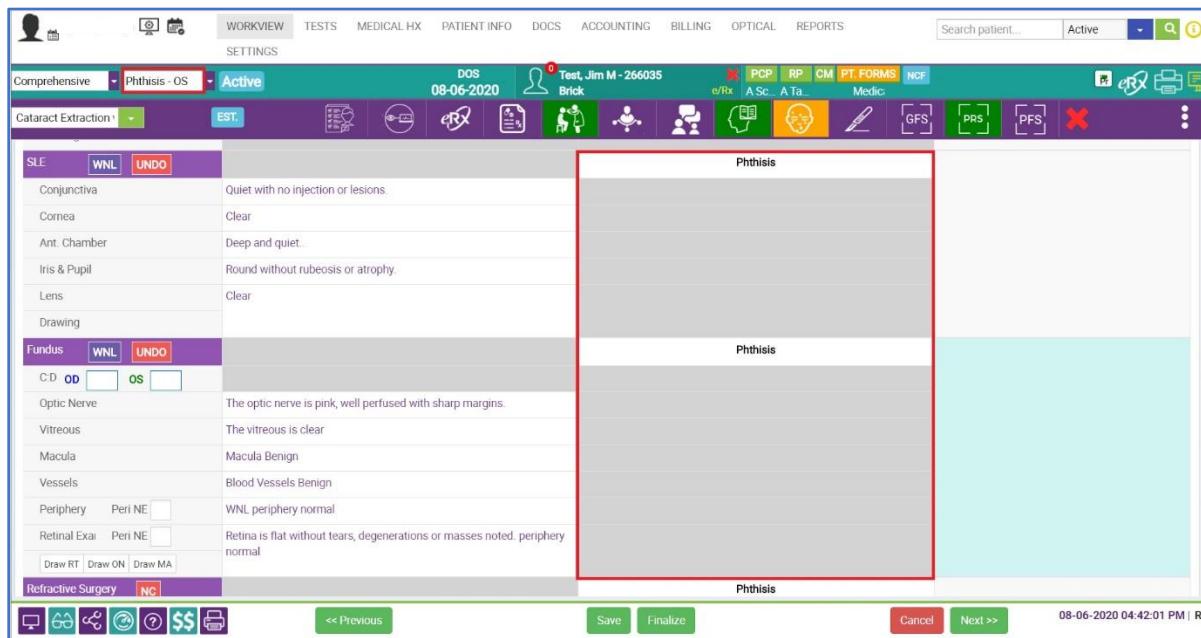
Variable added for CPT code modifiers

CPT	MOD 1	MOD 2	MOD 3	MOD 4
92015	54	50	26	58

**CL Worksheet** – we added new features and content to the CL Worksheet > Lens Type to include RGP Soft / Hard.



**Select Phthisis or Prosthesis** – we have added logic now that if this option is selected at the top left corner of the Workview screen then the system will not allow any additional information to be written in to the exam field areas for the selected eye.



**Contact lens prescription - Color** - Color noted on the CL Prescription would now print on the CL Prescription to be carried out by the patient.

The screenshot shows two windows side-by-side. The left window is a 'Contact Lens' software interface with tabs for 'New CL Worksheet', 'MR', and 'Final CL'. It includes sections for 'CL VISIT FEE', 'Evaluation', 'Fit', 'Recheck', 'Take Home', and 'Final'. A 'Copy From' dropdown is set to 'Select Sheet' with 'Usage' set to 'Select'. On the right, there's a 'Lens Type' dropdown with 'OD', 'SCL', and 'OU' options. Below these are fields for 'Make' (Acuvue Advance), 'BC' (8.8), 'Diameter' (13.6), 'Sphere/Power' (+0.50), 'Cylinder' (-0.75), and 'Axis' (025). A 'Color' field is highlighted with a red box and contains the value 'Aqua'. The right window is a web browser displaying a 'CL Worksheet' page for 'Rachel Marie - 70055' dated 'DOS: 05-16-2019'. It shows 'Prescription Details' for SCL lenses with OD and OS specifications. The 'Color' field in the 'Prescription Details' table is also highlighted with a red box and contains 'Aqua'. Below this is an 'Over Refraction' table with columns for Sphere, Cylinder, Axis, DVA, Sphere, Cylinder, Axis, and NVA. The 'Color' field from the previous table is repeated here. At the bottom, there's a 'Contact lens comments' section with a 'Date of service' field and a 'Comment' field.

	B.Curve	Diameter	Sphere	Cylinder	Axis	Color	ADD	DVA	NVA	Type	
SCL	OD	8.8	13.6	+0.50	-0.75	025	Aqua	+1.25	20/50	20/63(J8)	Acuvue Advan
SCL	OS	8.8	13.6	+0.50	-0.75	025	Aqua	ADD	DVA	NVA	Type

	Sphere	Cylinder	Axis	DVA	Sphere	Cylinder	Axis	NVA	Comfort	Moveme
OD									Comfortable	Loose
OS									Comfortable	Loose
OU										

## REPORTING

**Expanded the fields and filters for the Co-Pay Reconciliation report** – The report can now be filtered to exclude post-op visits, exclude certain procedures and if co-pay was collected or not.

The screenshot shows the 'Copay Reconciliation' report page. On the left, there are two main filter sections: 'PRACTICE FILTER' and 'ANALYTIC FILTER'. The 'ANALYTIC FILTER' section has several dropdown menus and checkboxes. One dropdown menu under 'Payment Method' is highlighted with a red box and contains the option 'Exclude Procedures'. Another dropdown under 'Exclude Appt. Status' is also highlighted with a red box and contains the option 'Copay Not Collected'. The 'SEARCH' button at the bottom of the filter panel is green.

**Recall and Reminders report** – we added a new filter to the report so it can become more specific to a procedure type based on what the client has set up in their system. The new filter is called “Recall Procedure”.

The screenshot shows the 'Reminder Recall' report page. Similar to the previous interface, it has 'PRACTICE FILTER' and 'REPORT FILTER' sections. The 'REPORT FILTER' section includes a dropdown menu for 'Recall Procedures' which is highlighted with a red box and contains the option 'Select All'. The 'SEARCH' button at the bottom is green. The status bar at the bottom right indicates the date and time: '08-06-2020 03:34:58 PM | R8'.

**Printing reports** was always cutting off the right edge. This is resolved and the format is correct.

Prepayments Report (Summary)

Operator	Facility	Payments	Applied	Unapplied
Dev, IMW	Toms River	\$1,662.40	\$0.00	\$1,662.40
Dev, IMW	Brick	-\$3,165.60	\$789.00	-\$3,954.60
Smith, Doe	Brick	\$20.00	\$20.00	\$0.00
	Total:	<b>-\$1,483.20</b>	<b>\$809.00</b>	<b>-\$2,292.20</b>

Red coloured Pre-Payments represents that there is refund amount deducted from these payments.  
Refund amount can be view by mouse over on red coloured amount.

createPdf.php

Operator	Facility	Payments	Applied	Unapplied
Dev, IMW	Toms River	\$1,662.40	\$0.00	\$1,662.40
Dev, IMW	Brick	-\$3,165.60	\$789.00	-\$3,954.60
Smith, Doe	Brick	\$20.00	\$20.00	\$0.00
	Total:	<b>-\$1,483.20</b>	<b>\$809.00</b>	<b>-\$2,292.20</b>

Red coloured Pre-Payments represents that there is refund amount deducted from these payments.

There is a new column added in the **Unprocessed Superbill** report to represent the Deferred Claims. This new column is also supported through the CSV export format.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Unapplied Superbills	Selected Date	Created by:	BA	on	07-28-2020 12:05 PM								
2	Selected Group : All	Selected Fac.	Selected Physician :	Encounter Status :	All									
3	Physician	Facility	Date & Time	Cl Time	CO Time	Patient ID	Procedure	SuperBill	EID	Charges Posted	Claim File	Deferred Claims		
4	Admir	Brick	1/22/2020 11:10	5:43 AM N/CO		Hill, Kim - 70466	A-Scan testing 2		3755					
5	Admir	Brick	1/23/2020 13:30	7:19 AM N/CO		Hill, Kim - 70466	Argon Retinal Laser PRP							
6	Admir	Brick	5/20/2020 12:40	11:39 PM N/CO		Doe1, Smith1 T - 266108	CATARACT Sx							
7	Admir	Brick	5/20/2020 13:50	11:39 PM N/CO		Doe1, Smith1 T - 266108	Acute							
8	Bonsi	Brick	2/1/2020 18:00	6:10 AM	6:10 AM	Smith, MW - 266098	A-Scan testing 2	N/SB	3772			Self Pay		
9	Bonsi	Brick	4/1/2020 11:00	3:23 AM N/CO		Ter, New19 - 266141	Follow Up							
10	Bonsi	Brick	5/3/2020 9:00	3:42 AM N/CO		Ter, New19 - 266141	CATARACT Sx							
11	Bonsi	Brick	5/29/2020 10:20	12:15 AM	12:17 AM	TwoOTwoTwo, TestPt T - 266 Post OP								
12	Bonsi	Brick	5/29/2020 10:30	12:15 AM	12:17 AM	TwoOTwoTwo, TestPt T - 266 Cataract Extraction with Intraocular Lens Implant								
13	Bonsi	Brick	5/29/2020 13:00	N/CI	N/CO	Aqc123, Koal123 - 266127	Cataract Extraction with Intraocular Lens Implant							
14	Bonsi	Brick	6/6/2020 10:30	1:38 AM N/CO		IMWQO, IMJ - 266143	Post OP	\$85.00	4064					
15	Bonsi	Brick	6/6/2020 11:20	1:41 AM N/CO		Doe, Smith - 266172	Chalazion							
16	Bonsi	Brick	6/6/2020 12:50	1:43 AM N/CO		Smith, Conn - 266169	Follow Up							
17	Bonsi	Brick	6/6/2020 14:30	2:16 AM N/CO		Smith5, Test T - 266146	Poss FB	\$225.00	4067					
18	Dev, I	Brick	1/22/2020 11:30	5:01 AM N/CO		Doe, Becker - 70079	ASCAN/FU							
19	Dev, I	Brick	2/25/2020 9:20	12:05 AM N/CO		Doe, Consent - 266091	Follow Up							
20	Dev, I	Brick	3/24/2020 9:30	12:59 AM N/CO		Imw, Doe - 266061	CATARACT Sx	N/SB	3917					
21	Dev, I	Brick	4/22/2020 8:10	N/CI	N/CO	Aqc123, Koal123 - 266127	Chalazion							
22	Dev, I	Brick	4/22/2020 9:20	N/CI	N/CO	Aqc123, Koal123 - 266127	Acute							
23	Dev, I	Brick	4/22/2020 10:00	N/CI	N/CO	Aqc123, Koal123 - 266127	IOL Master JP-Basic							
24	Dev, I	Brick	5/13/2020 8:20	1:46 AM N/CO		Doe, Austin - 70175	Cataract Extraction with Intraocular Lens Implant							
25	Dev, I	Brick	5/21/2020 9:00	11:28 PM N/CO		Aqc123, Koal123 - 266127	CATARACT Sx							

**PRACTICE FILTER**

Groups Facility Provider  
Select All Select All Select All  
Operator Period  
Select All 12-25-2011 07-28-2020

Encounter Status  
Select All Summary Detail  
Time  
DOS DOC DOR DOT  
Exclude Rescheduled Appointments

**ANALYTIC FILTER**

Ins. Group Ins. Carrier  
Select All Select All

Payment Method  
Select  
Un-processed

**GROUP BY**

Groups Facility Physician  
Operators Department View Order

**INCLUDE**

Apt Transactions Count Summary

**FORMAT**

**REPORT FILTER**

**Unapplied Superbills (Detail)**

Date: From 12-25-2019 To 07-28-2020  
Selected Group : All Selected Facility : All  
# Appt Date & Time CI Time CO Time Patient Name - ID Procedure SuperBill EID Charges Posted Claim File & Date Deferred Claims

**Physician : Admin, MedicWare Facility : Brick**

1	01-22-2020 11:10 AM	05:43 AM	N/C/O	Hill, Kim - 70466	A-Scan testing 2	3755	
2	01-23-2020 01:30 PM	07:19 PM	N/C/O	Hill, Kim - 70466	Argon Retinal Laser PRP		
3	05-20-2020 12:40 PM	11:39 PM	N/C/O	Doe1, Smith1 T. - 266108	CATARACT Sx		
4	05-20-2020 01:50 PM	11:39 PM	N/C/O	Doe1, Smith1 T. - 266108	Acute		

Facility Total : \$0.00 \$0.00

**Physician : Bonsall, Chris Facility : Brick**

1	02-11-2020 06:00 PM	06:10 AM	Smith, IMW - 266098	A-Scan testing 2	N/S/B	3772	Self Pay
2	04-01-2020 11:00 AM	03:23 AM	N/C/O	Ter, New19 - 266141	Follow Up		
3	05-03-2020 09:00 AM	03:42 AM	N/C/O	Ter, New19 - 266141	CATARACT Sx		
4	05-29-2020 10:20 AM	00:15 AM	TwoToTwoTwo, TestPT T. - 266175	Post OP			
5	05-29-2020 10:30 AM	00:15 AM	TwoToTwoTwo, TestPT T. - 266175	Cataract Extraction with Intracocular Lens Implant			

**SEARCH**

Print PDF Export CSV

## **Lost to Follow Report** – The following Filters are enhanced:

- Insurance Company - This lists all the insurances available in Settings > Billing > Insurance.
- CPT - Display all CPTs once a CPT is selected.
- ICD 10 - If any ICD 10 code is selected, look at the entire Problem list for that patient and if that ICD 10 is present, then present that patient on the result.

The screenshot shows the 'Lost to follow' report page. At the top, there are navigation tabs: WORKVIEW, TESTS, MEDICAL HX, PATIENT INFO, DOCS, ACCOUNTING, BILLING, OPTICAL, and REPORTS. A search bar and filter dropdowns are also at the top. The main area has two filter sections: 'PRACTICE FILTER' and 'ANALYTIC FILTER'. The 'ANALYTIC FILTER' section is highlighted with a red box. It includes fields for 'Ins. Comp.', 'CPT Code', 'ICD 10', 'Action' (set to 'Template'), 'Select' (dropdown), 'Heard Type' (dropdown), and several checkboxes for patient status like 'New Patient', 'Lost Patient', etc. Below these filters is a 'SEARCH' button and a row of icons. The bottom right corner shows the date and time: 07-28-2020 12:40:56 PM | R8.

**Recall Fulfillment report** has a new filter added to it so the user can filter by Procedures.

The screenshot shows the 'Recall Fulfillment' report page. The layout is similar to the previous one, with navigation tabs and a search bar at the top. The main area features a 'PRACTICE FILTER' section with a dropdown for 'Recall Procedures' which is highlighted with a red box. Other filter options include 'Facility', 'Recall Month' (set to Jul), 'Recall Year' (set to 2020), 'Fulfilled From' and 'Fulfilled To' date pickers, 'Report Type' (set to 'Template'), and a 'SEARCH' button. The bottom right corner shows the date and time: 07-28-2020 12:45:08 PM | R8.

**Display both chart number and MRN or external ID.** Both numbers are shown in the Day Appointment report.

Day Appointments Report				From : 12-01-2019 To : 07-22-2020	
Provider Name:	Dev, iMW (Full Day)			Hemet Office	
Apt.	Time	Duration	Patient Name-ID	Phone #	Procedure
<b>Sunday, 02-23-2020 - 1 appointment(s)</b>					
<b>Morning Appointments</b>					
1	09:20 AM	5 Min.	Smith, Adela - 100100/0100100		Cat Con,Comp NP
<b>Saturday, 03-28-2020 - 2 appointment(s)</b>					
<b>Morning Appointments</b>					
2	08:30 AM	5 Min.	Cvc, Cv - 184601/203659 (e)		Cat Con,CL F/U,F/U
3	10:00 AM	5 Min.	Cvc, Cv - 184601/203659 (e)		Dilate,Cat Sx,F/U

**Patient Status** – new report added to show patient status based on how the client has setup the statuses in the system. To set up Patient Status go to Settings > Billing > Status – what has been defined here will appear in the drop-down list for your selections.

**Appointment Status report** – this was modified so when you set the Appt. Status to Cancelled / Cancellation then a new filter will appear allowing you to enter the appointment cancellation reason.

The screenshot shows the 'Appointment Status' report page. On the left, there is a 'REPORT FILTER' sidebar with dropdown menus for Provider, Facility, Operator, Period (set to 11-06-2019 to 08-05-2020), and a 'Select All' button. Below these are sections for 'APPOINTMENT FILTER' and 'Cancellation Reason'. The 'APPOINTMENT FILTER' section has dropdowns for Procedures (highlighted with a red box), Appt. Status (highlighted with a red box), ICD10, Ins. Carrier, Age, and From/To date fields. The 'Cancellation Reason' section has a dropdown menu with options like 'Death in the Family', 'Deceased/Expired', 'Dr Vacation', etc., with 'Patient Leaving Practice' selected. At the bottom of the sidebar is a 'SEARCH' button. The main area displays a table of appointment records with columns for #, Pt. Id, Pt. Last Name, Pt. First Name, Facility, Procedure, and ICD10 codes. The table is sorted by Pt. Id. A green 'Print PDF' button is at the bottom right of the main table area.

**Workable No Show report** – we added a field for Notes to this report which can be changed and modified on the fly within the report. If you create a note and now want it to print you must select the Search button again to regenerate the report and then select Print PDF.

The screenshot shows the 'Workable No Show Report' page. On the left, there is a 'REPORT FILTER' sidebar with a 'From : 06-01-2020 To : 08-05-2020' date range. The main area displays two tables of appointment records. The first table has columns for Pt. ID, Last Name, First Name, Home Phone, Biz Phone, Cell Phone, Preferred, Appt. Date, and Appt. Time. The second table has similar columns and includes an 'Appt. Comments' column. In the second table, the 'Appt. Comments' column for the first row contains two entries: '08-05-20 BA: test1' and '08-05-20 BA: test2', both highlighted with a red box. A green 'Print PDF' button is at the bottom right of the second table area.

**Rejection Codes** – we expanded the ability to have all rejection reason codes displayed for the list and drop-down. You can also search within the field to find a certain code that you need.

The screenshot shows the AR Worksheet interface. On the left, there's a sidebar with various filters like Aging From, Balance From, and Rejection Status. The main area has a table titled 'Insurance' with columns for 0 - 30, 31 - 60, 61 - 90, 91 - 120, and 121 - 150. On the right, there's a large search dropdown menu where 'ma102' is being typed into a search field. A dropdown list shows 'ma102' selected. At the bottom, there are 'Print PDF' and 'Export CSV' buttons.

**DOR Column on “Daily” Category reports** - DOR column has been added for custom financial daily reports to ease down and drill down reports as the user wants to build. To create a custom report go to Settings > Reports > Financials and create a custom report under the "Daily" category.

The screenshot shows the 'New Report Template' dialog box. On the left, there's a sidebar with a 'FINANCIAL TEMPLATES' section containing various report types like Day Sheet, Payments, Daily Balance, etc. The main area has sections for 'Report Type' (set to 'Daily'), 'Template Name', 'PRACTICE FILTER' (with a 'DOR' checkbox highlighted), 'ANALYTIC FILTER', 'GROUP BY', 'INCLUDE', and 'FORMAT' (with 'View Only' checked). At the top right, there's a user profile and a close button.

Refresh the window, the new report can be found under Financial > Daily. DOR column added for posted payments and for pre-payments.

**Prepayments**

**PRACTICE FILTER**

Groups	Facility	Provider	
Select All	Select All	Select All	
Operator	Period		
Select All	07-01-2019	08-10-2020	
Department	Select All	<input type="radio"/> Summary <input checked="" type="radio"/> Detail	
		Time	
<input type="radio"/> DOS	<input type="radio"/> DOC	<input checked="" type="radio"/> DOR	<input type="radio"/> DOT

**ANALYTIC FILTER**

Ins. Group	Ins. Carrier
Select All	Select All
Payment Method	
Select	
<input type="checkbox"/> Un-processed	

**GROUP BY**

<input type="radio"/> Groups	<input type="radio"/> Facility	<input type="radio"/> Physician
<input type="radio"/> Operators	<input type="radio"/> Department	<input type="radio"/> View Order

**INCLUDE**

<input type="checkbox"/> Appt	<input type="checkbox"/> Transactions	<input type="checkbox"/> Count Summary
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**FORMAT**

<input checked="" type="radio"/> View Only	<input type="radio"/> PDF	<input type="radio"/> CSV
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**SEARCH**

CI/CO transaction have only one date which is already displayed so no DOR column added for these transactions.

**Email Log** - A new report has been created to track whether the email sent out of the system has been sent out successfully or not. This report is also privilege-based, hence only users with the privilege for this report would see it. The privilege for this report is under, Settings > Admin > Users > Select User > Privileges > Reports > Practice Analytics > Email Log.

**Edit New Record**

**Privileges**

**Practice Analytics Privileges**

<input checked="" type="checkbox"/> FRONT DESK	<input type="checkbox"/> Select All					
<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Heard about us	<input checked="" type="checkbox"/> Registered New Patient	<input checked="" type="checkbox"/> Lost to follow	<input checked="" type="checkbox"/> Followups	<input type="checkbox"/> Email Log	
<input checked="" type="checkbox"/> ACCOUNT/B	<b>Done</b> <b>Close</b>					
<input checked="" type="checkbox"/> Manager	<input checked="" type="checkbox"/> Accounting	<input checked="" type="checkbox"/> Billing	<input checked="" type="checkbox"/> Edit Financials			
<input checked="" type="checkbox"/> Ins. Management	<input checked="" type="checkbox"/> Account History	<input checked="" type="checkbox"/> Charges	<input checked="" type="checkbox"/> Payment			
<input checked="" type="checkbox"/> Statements	<input checked="" type="checkbox"/> Day Charges	<input type="checkbox"/> Edit Batches				
<input checked="" type="checkbox"/> REPORTS	<input checked="" type="checkbox"/> MANAGER					
<input checked="" type="checkbox"/> Scheduler	<input checked="" type="checkbox"/> Practice Analytics	<input checked="" type="checkbox"/> Financials	<input checked="" type="checkbox"/> Compliance			
<input checked="" type="checkbox"/> CCD	<input checked="" type="checkbox"/> API	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Optical			
<input checked="" type="checkbox"/> Reminders	<input checked="" type="checkbox"/> Clinical	<input checked="" type="checkbox"/> Rules	<input checked="" type="checkbox"/> iPortal			
<input checked="" type="checkbox"/> PT PORTAL						
<input checked="" type="checkbox"/> Front Desk	<input checked="" type="checkbox"/> Clinical	<input checked="" type="checkbox"/> Message Coordinator				
<input checked="" type="checkbox"/> ICONS						
<input checked="" type="checkbox"/> iMedicMonitor	<input checked="" type="checkbox"/> Optical	<input checked="" type="checkbox"/> IASC Link	<input checked="" type="checkbox"/> Financial Dashboard			

**Done** **Close** **Close**

Once the User has the Privilege for this report, they will see the report under Reports > Practice Analytics > Email Log.

The logs would be picked for

- AR worksheet
- Direct Emails
- Statements

**Referring Physician report** - Users will now be able print labels from this report, the output would work as before, and a new button has been added to print the address label of Referring Physician.

Referring Physician Report	Selected Referring Phy: Aaron, Cynthia	DOS: 08-01-2020 To 08-10-2020	Provider: All	Created by BA on 08-10-2020
Selected Group: All	Selected Facility: Multi	Selected CPT Code: All	Selected DX Code: All	Selected Insurance
Referring Physician: Grasso, Greg	Facility: Brick - 11	Billed amount: *1/1*	Allowed amount: \$141.87	BCBS of California
Aaron, Cynthia				
Physician Total:	*1/1*	\$141.87	\$141.87	
Grand Total:	*1/1*	\$141.87	\$141.87	

**SPARCS Report** - A new report is being introduced in this version for the clients to generate the SPARCS Report, they can now generate a test as well as a Production version of the same report and upload it to the Portal. This report is available under, Reports > State > SPARCS Report.

The screenshot shows the SPARCS Report interface. At the top, there's a header with the user information "Mr. Test, Jim M - 266035" and "Brick". Below the header is a "PRACTICE FILTER" section with "DOS Period" set from "03-01-2020" to "07-29-2020". To the right is a "REPORT FILTER" section. The main area displays a table titled "SPARCS Report" with the following data:

Patient Name-ID	EID	DOS	CPT	DX Codes	Units
Smith, IMW - 69600	4204	07-20-2020	66982, 66984	H25.13	5
Smith, IMW - 69600	4203	07-20-2020	66982, 66984	H25.13	5

At the bottom of the interface, there are buttons for "SEARCH", "Get Test File", "Get Production File", and a timestamp "07-29-2020 05:11:34 PM".

Since this report links to sensitive patient data, we have made this report Privilege based, only Users who have been given the Privilege for this report under: Settings > Admin > Users > Privilege > Reports > State > SPARCS Report. Users will see this report under their Reports > State section.

The screenshot shows the "State Privileges" section of the Privileges management interface. Under the "MANAGER" category, the "SPARCS Report" checkbox is selected. Other checkboxes in this category include "KY State Report", "NC State Report", "IL State Report", and "PA State Report". There are also sections for "REPORTS" (Scheduler, CCD, Reminders) and "PT PORTAL" (Front Desk). The "CLOSE" button is visible at the bottom right of the dialog.

PRACTICE FILTER		
Groups Select All	Provider Select All	Facility Select All
Period From <input type="button" value="Calendar"/> To <input type="button" value="Calendar"/>		
<input checked="" type="radio"/> DOS <input type="radio"/> DOC <input type="radio"/> DOR <input type="radio"/> DOT <input checked="" type="radio"/> Summary <input type="radio"/> Detail		
ANALYTIC FILTER		
Ins. Group Select All	Ins. Carriers Select All	
Ins. Group by Nothing selected	CPT Select All	
Aging From 00	Aging To 181+	
>Balance Amount		
GROUP BY		
<input checked="" type="radio"/> Insurance <input type="radio"/> Groups <input type="radio"/> Facility		
INCLUDE		
<input type="checkbox"/> Payments	<input type="checkbox"/> Adjustments	<input type="checkbox"/> Acc. Details
SAVED CRITERIA		
Saved Searches Select <input type="button" value="Down"/> <input type="checkbox"/> Save		

**AR Aging Insurance Report** - Since this is one of the most widely reports, we have enhanced and added filters to the same.

Also added few more columns which the user can add onto the output to enhance their report. Please note for AR Aging, we have also launched a full AR Worksheet which can be fully used.

**Ledger Report** - The Ledger report now includes debit/credit transactions.

Credit/debit transaction done between these procedures and one procedure exists without any payment transactions, it is only with credit/debit transaction and it may be with or without a payment mode. Now these types of transactions are being fetched and displayed in all types of reports. If no payment mode selected, then this transaction will display under column "Other" which is newly created.

## Co-Pay as an option under Payment Ledger Methods-

Copayment has been added as an option under Payment Ledger > Service Payments > Methods > Patient/ Guarantor > Copayment.

Service Payments		CI/CO Pmts:		AA	Pri: 123456	Mr. Marie, Rachel - 70055	X	ERA	Claims	Statements	A&P	Notes
		\$152.50		Sec:	Brick							
DOS: 03-28-2019 E.I.d: 3506		Group Name:	Associates		Ins. Case Medical	Primary BCBS/\$20.00	AR Status	Credit to other Encounter			Auth#: Auth Amount: \$0.00	
Apply	CPT	Dx Code	T. Charges	Allowed	Deductible	Pri Amt	Patient Amt	Method	CC / Ch.#	Paid	Balance	DOI
<input type="checkbox"/>	92250	365.10	\$ 92.55	\$ 92.55	\$ 0.00	\$ 92.55	\$ 0.00	Brick		\$0.00	\$92.55	08-07-2
<input type="checkbox"/>	92020	365.10	\$ 30.43	\$ 30.43	\$ 0.00	\$ 30.43	\$ 0.00	Brick		\$0.00	\$30.43	08-07-2
<input type="checkbox"/>	92004	365.10 366.16	\$ 170.06	\$ 170.06	\$ 0.00	\$ 170.06	\$ 0.00	Brick				Patient Pre Pmts
<input type="checkbox"/>	2027F	365.10	\$ 0.01	\$ 0.01	\$ 0.00	\$ 0.01	\$ 0.00	Brick				Check In/Out
<input type="checkbox"/>	92014	H00.11 H25.12 H43.812	\$ 141.87	\$ 141.87	\$ 0.00	\$ 141.87	\$ 0.00	Brick		\$0.00	\$141.87	08-07-2

**View previously submitted claims** - To verify what has been submitted to the payer on previous instances, the user would now be able to view the past claim submitted.

To view the past claim submitted, the User can open the claim in 2 ways:

1. Patient > Accounting > Claims Button > Open the file > The form loaded would be what has been submitted to the Insurance Payer in that instance.
2. Billing > Electronic > Select File > Select patient > The form loaded would be what has been submitted to the Insurance Payer in that instance.

This functionality was previously only available for printed claims but has now been extended to Electronic claims also.

### **New variable**

The {ARRIVAL\_TIME} variable has been added under Consent, Consult and Pt Docs under Settings > Documents. To add this variable on the document, following steps must be taken:

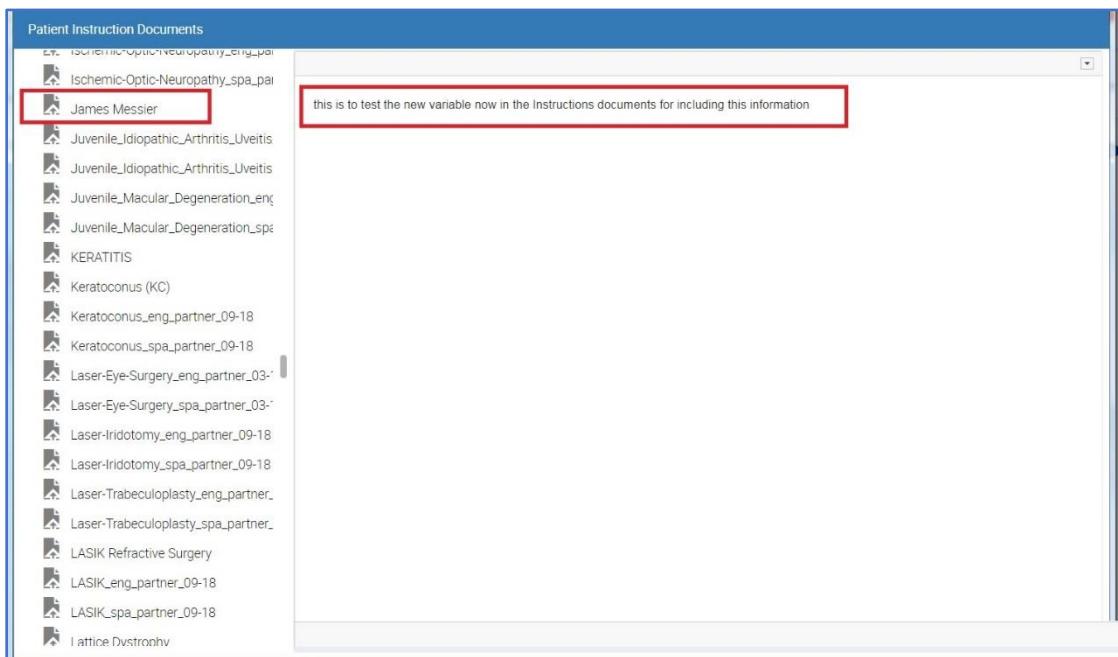
1. Add variable on the said Template.
2. Go to scheduler and add the appointment for the current date.
3. Create a chart for that same Appointment DOS.
4. Go back to scheduler and select same appointment.
5. Right-click on the appointment and set the status to "Arrived" if it is already not set to it. Go to admin > schedule status and enable the "Arrived (AR)" status from there by selecting the red box in front of the Arrived status.
6. When the schedule appointment status is marked as Arrived, then the arrived time will start to appear in place of variable.

## DOCUMENTS & DEMOGRAPHICS

**Patient Discussions are now added as a variable** to the Patient Instructions document area. You can now add Patient discussions from the Workview screen to show and represent that discussion as part of the chart and as part of the Patient Instruction documents.

The screenshot shows the 'Instructions' tab selected in the top navigation bar. On the left, there's a sidebar with various document types like 'PLAN 1', 'PLAN 2', etc., and a section for 'APPT PROVIDER'. The '(PT\_DISCUSSION)' field is highlighted with a red box. The main area is titled 'DOCUMENT FORM' and includes fields for 'Template Name' (set to 'SNOMED CT'), 'Cpt Code', 'Type of visit', 'Medications', 'Tests/Exam', 'Lab', and 'Lab Result'. Below these are buttons for 'Source' and a toolbar with various icons. At the bottom are 'Save' and 'Add New' buttons.

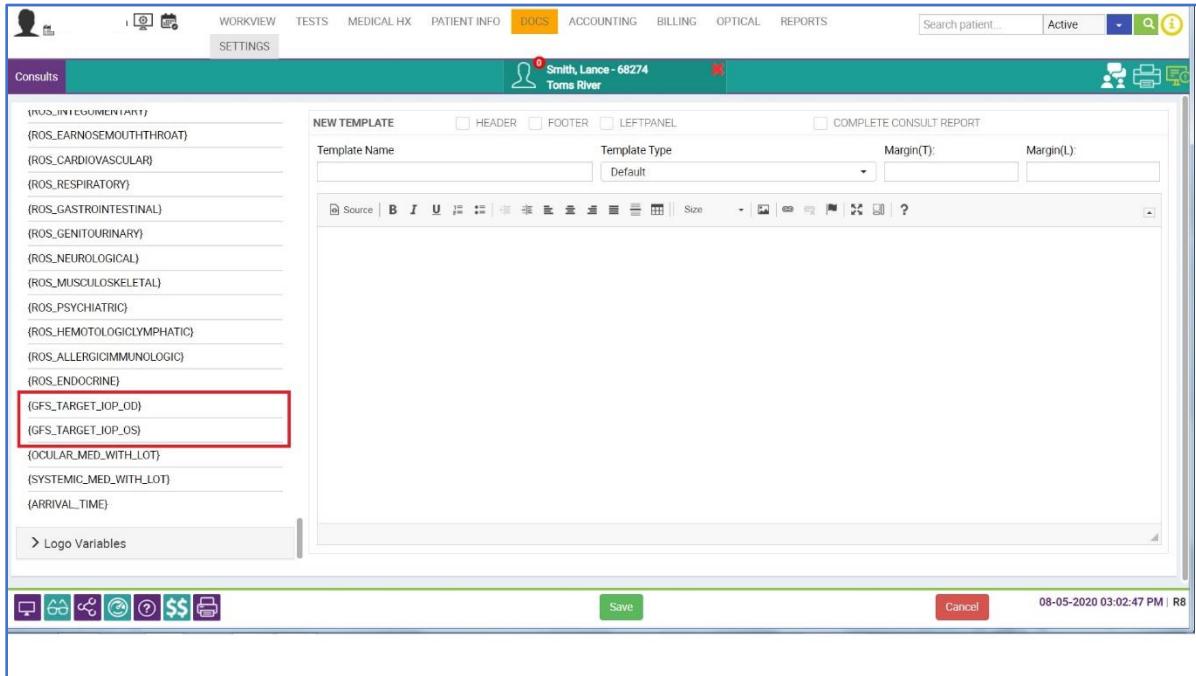
This screenshot shows the same 'Instructions' tab setup as the previous one. The 'PT DISCUSSION / COMMENTS' field at the bottom left is highlighted with a red box. It contains the text: 'this is to test the new variable now in the Instructions documents for including this information' and the timestamp '07-28-20 13:13:13'. To the right, there's a 'CARE GIVER COLORS:' section with a dropdown set to 'Phys.' and a color swatch. The bottom of the screen shows standard navigation buttons and a timestamp '07-28-2020 01:20:54 PM | R8'.



**Statement variables** – you can now edit the document and add, change, or modify the variables associated with the statements document. We added the ability to change, add or modify the Email subject and body of the statement per statement.

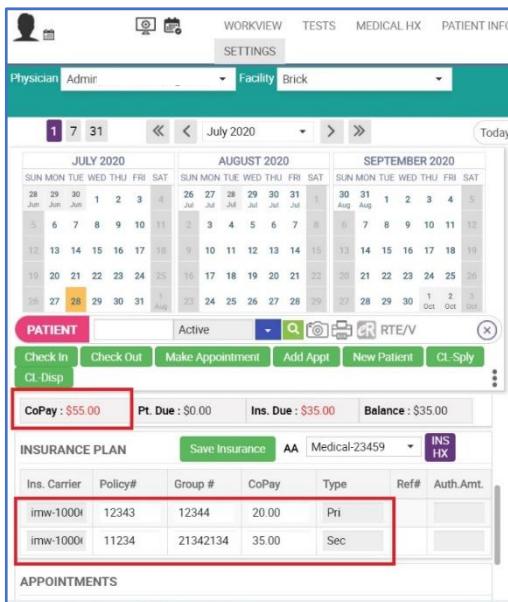
The screenshot shows the 'Statements' module in a software application. The top navigation bar includes icons for Home, Workview, Tests, Medical Hx, Patient Info, **BILLS**, Accounting, Billing, Optical, Reports, and a search bar. The main area has tabs for 'Statements' and 'Template Preview'. On the left, a sidebar titled 'VARIABLES' lists various placeholders starting with '{PATIENT ID}' and ending with '{GROUP FAX}'. The main content area displays a 'STATEMENT' template with fields for 'Email Subject' and 'Email Body', along with a rich text editor toolbar. Below that is a preview of the 'STATEMENT' document, which includes sections for 'IF PAYING BY CREDIT CARD, FILL OUT BELOW', 'ADDRESSSEE:', and 'REMIT TO:'. The bottom of the screen shows a toolbar with icons for Print, Save, and other functions, and a timestamp '08-05-2020 02:53:19 PM | R8'.

**Consult Letter variables** – we added the ability to include the Target IOP to the Consult letter variables.



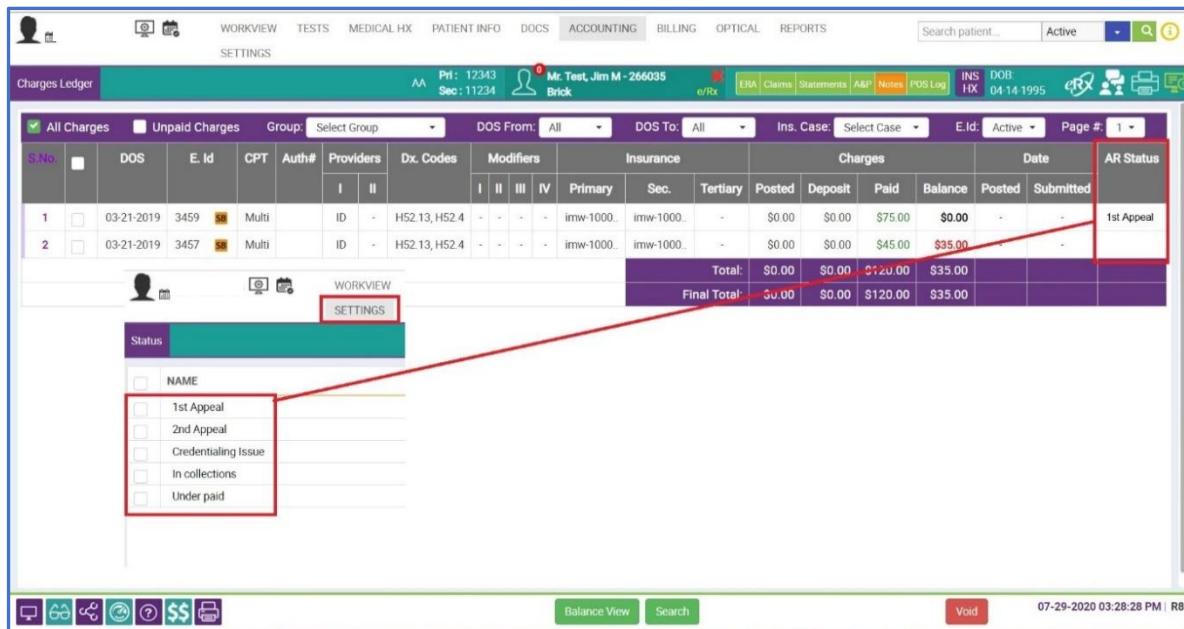
## Accounting (AR Worksheet)

**Secondary Insurance - Co-Pay** - We have added the ability to enter the secondary insurance co-pay into the Insurance screen under the secondary insurance area. From the Scheduler screen then you will have a compounded Co-Pay shown and represented.



When you scroll down or look at the secondary insurance on the patient chart then it will indicate the individual co-pay for the secondary as well as the primary insurance.

**Status Field added** – we added a new column for the following screens Accounting > Charges > Payment > Service Charges > Payments – all these screens will display a new column. To define the Status field, go to Billing > Claim Status and you can add and modify your statuses.



**Claims Filing Days (CFD)** – this column on the detailed AR Worksheet has been updated to show the number of days remaining before the file is overdue and can't be submitted. Claim filing days are the number of days within which an original claim can be filed to an insurance company for adjudication. If the claim exceeds the claim filing days and then submitted it will be denied due to late filing. We now have a "real-time" counter established on the screen and in the AR Worksheet CFD column. This counts down real-time based on the number of days defined under Settings > Billing > Insurance > Claim Filing Days. This can be client set and each insurance can be different.

Add New Record

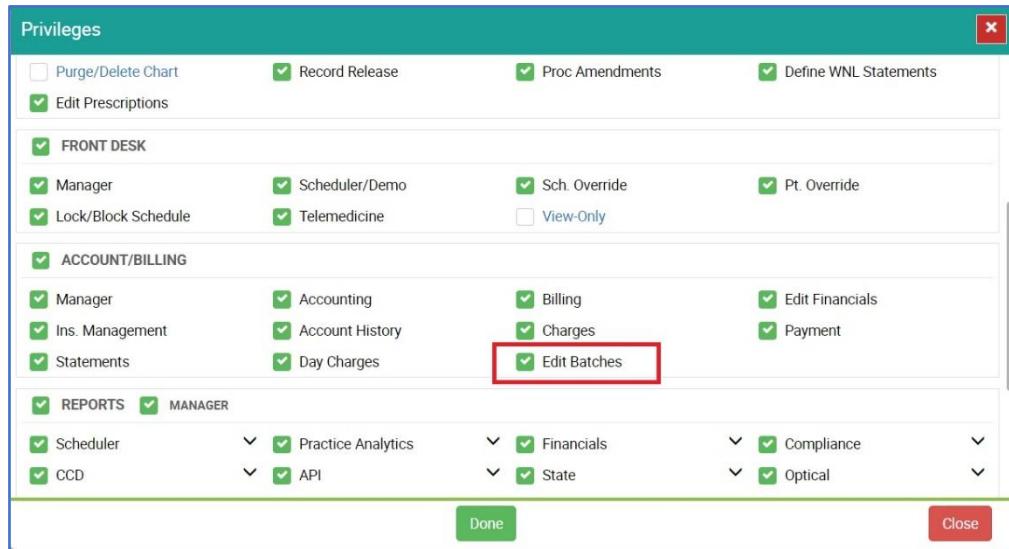
COMPANY NAME	PRACTICE CODE	CONTACT ADDRESS	PHONE	PDI / SEC PAYMENTS	CLAIM TYPE	MY	DEFERRED DEBONDED	STATUS		
Company Name <input type="text"/>	Contact Name <input type="text"/>	MAILING	IDS	MORE INFO						
Practice Code <input type="text"/> -Select-	Insurance Group <input type="text"/>	Phone <input type="text"/>	Practice Group ID <input type="text"/>	Fee Table Default	Status Active					
Primary HCPA1500	Secondary HCPA1500	Claim type Emdeon	Fax <input type="text"/>	Institutional Group ID <input type="text"/>						
Accept/No Accept Assignment Accept Assignment	Assignment Type 837i	Email <input type="text"/>	Co-Ins <input type="checkbox"/>	Collect. <input type="checkbox"/>	Receiver ID <input type="text"/>	Description <input type="text"/>	FD <input type="checkbox"/>	Billing <input type="checkbox"/>	RTE <input type="checkbox"/>	
Zip Code <input type="text"/>	City <input type="text"/>	State <input type="text"/>	Payer ID (Inst) <input type="text"/>	Payer ID (Pro.) <input type="text"/>	Payer ID (RTE) <input type="text"/>	Submitter ID <input type="text"/>	Send NDC <input type="checkbox"/>	Pre-Auth <input type="checkbox"/>	ICD Code <input type="text"/>	MSP Type <input type="text"/>
Claim Filing Days (CFD) <input type="text" value="80"/>		Payment Due Days (PD) <input type="text" value="83"/>	<input type="checkbox"/> Capitation <input type="checkbox"/> CPT Alert							
<input type="checkbox"/> Direct Billing <input type="checkbox"/> Collect tests <input type="checkbox"/> Copy		<input type="checkbox"/> Referral Required								

**Save** **Close**

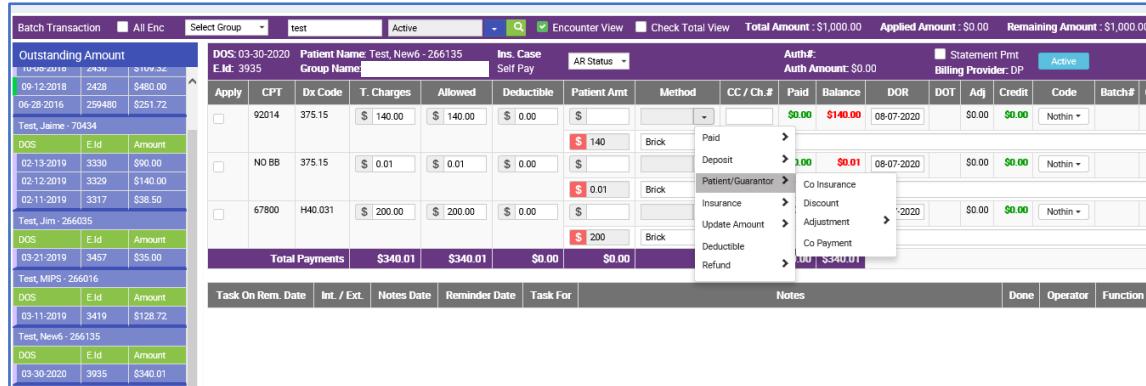
**Payment days (PD)** is the number of days within which the Insurance company is expected to make a payment or give denial/rejection. This is set up under Settings > Billing > Insurance > Click on Insurance company > Payment Due Days(PD). The count would go in reverse and would be in black font. Once the number reaches 1 when the days are complete - from the next day the counter should start from "-1" but in **red font color**. Based on what you have setup for the insurance company Payment Days will determine the color and when the font goes from black to red.

COMPANY NAME		PRACTICE CODE	CONTACT ADDRESS	PHONE	DOI / SEC PAYMENTS	CLAIM TYPE	MY	RECEIVED DEFERRED	STATUS
Edit Record									
<b>COMPANY</b> Company Name: <input type="text" value="AARP"/> Practice Code: Insurance Group <input type="text" value="imw-100061"/> Medicare		<b>CONTACT</b> Contact Name: <input type="text" value="Debbie"/> Street: <input type="text" value="PO Box 740819"/>		<b>MAILING</b> Phone: <input type="text" value="8002277789"/> Fax: <input type="text" value="1234567890"/> Email: <input type="text" value="aarp@x"/>		<b>IDS</b> Practice Group ID: <input type="text" value="222420132"/> Institutional Group ID: <input type="text" value=""/> Receiver ID: <input type="text" value=""/>		<b>MORE INFO</b> Fee Table: <input type="text" value="Default"/> Status: <input type="text" value="Active"/> State Payer: <input type="text" value="Ins. Type"/> Description: <input type="text" value="FD Billings RTE Send NDC Pre-Auth ICD Codes MSP Type"/>	
Primary	Secondary	Claim type		Co-Ins	Collect.				
Electronics	Electronics	Emdeon		<input type="checkbox"/>	<input type="checkbox"/>				
Accept/No Accept Assignment		Institutional							
Accept Assignment		Type	<input type="text" value="837I"/>						
Claim Filing Days (CFD)		Payment Due Days (PD)							
<input type="text" value="0"/>		<input type="text" value="10"/>							
<input type="checkbox"/> Direct <input type="checkbox"/> Collect tests <input type="checkbox"/> Referral Required <input type="checkbox"/> Billing <input type="checkbox"/> Copy									
<input type="button" value="Save"/>									

**Batch Edits** – we have added a new feature and it is controlled by and through the user privileges sections. “Edit Batches” must be checked off for a user to be able to have the right to edit a batch. Information which can be altered: Batch name, tracking number, payment method, reference number. This privilege is turned OFF by default.



**Batch Processing** - Other Payment methods have been added under Billing > Batch processing > Select/Create a batch > Select a patient > Methods, most of these methods have been added to maintain consistency throughout the system.



**“Patient Pre Pmts” and “Check In/Out” Payments:-** Calculations are performed in Accounting live tables but batch is still not processed, hence this method has not been added as part of Batch Processing methods.

**“Credit/Debit”:-** If one operator performs credit/debit in batch, since these are not updated in Accounting live tables, and another operator makes changes in debit

encounter, then if the batch is posted it will mess up. The better way to post these is by going to the Payment Ledger of the patient, checking the account and then posting it, hence this is also not part of the batch processing methods.

**"Returned Check":-** In our system we add a new procedure charges against "Return Check" transaction but batch is not posted yet, we do not have option to add/edit charges in batch screen, hence it is not possible to add this method as part of the Batch Processing methods.

**AR Worksheet - Patient view** - Between the Summary and Detailed view of the AR Worksheet, a Patient view has been created, here the user will see the list of patients under the row on the Summary page.

AR Worksheet

Insurance: MEDICAO - Medicaid/Unisys

Patient Name - ID	DOB	Charge	0 - 39	31 - 60	61 - 90	91 - 120	121 - 150	151 - 180	181+	Balance
Doe, IMV - 70519	12-14-1988	\$5,700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,889.00	\$4,889.00
Smith, Eugenio - 68386	01-01-1900	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$75.00	\$75.00
Total		\$5,775.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,964.00	\$4,964.00

AR FILTER >

Summary Print PDF Export CSV Write Off Letter

**To move from the Patient to Summary view**, the user needs to select the Patient name, then they will be taken to the Detailed view of that patient. To return to either the Patient view or Summary view from Detailed view, the User just needs to select Pt. View or the Summary button respectively.

The screenshot shows the AR Worksheet interface. At the top, there is a header with various fields like Insurance, MEDICAID - Medicaid, Patient Name - ID, DOB, DOS, POS Facility, Provider, Ins. Type, Ins. ID, DOC, CPT, ICD10, R Charge, Tel., Balance, CFD, PD, 1st Claim, Note, Reminder Date, Case Type, AR Status, and Assign To. Below the header is a table with one row of data. At the bottom of the screen, there is a toolbar with buttons for Summary, Pt View, Print PDF, Export CSV, Write Off, Re-Submit, Claim, Status, Assign To, Follow Up, and Letter. Two red arrows point from the text labels "To return to Summary view" and "To return to Patient View" to the "Summary" and "Pt View" buttons respectively.

For the detailed view, only details of the encounter of the selected patient will be seen. All Headers are fixed for this view. The user can also sort in ascending or descending order by selecting the Header of the column.

**AR Worksheet - Notes Section** - The Notes section is available under the detailed view of the AR Worksheet. Any notes added on the Encounter under Patient > Accounting > Payments Ledger > Notes, the latest notes on the section would be available for the User to check. The user can also select the Note and see the series of notes which have been entered related to this encounter along with Reminder Date (if any).

The screenshot shows the AR Worksheet interface with a modal dialog box titled "Encounter Notes". The dialog box contains a table with two columns: "Notes" and "Reminder Date". Under the "Notes" column, there are two rows: "This is test note 2" and "This is test note 1". The "Reminder Date" column is empty. A red box highlights the "Note" column header in the table. At the bottom right of the dialog box is a "Close" button.

## Facility Column

To accurately capture what AR is pending from which facility, we have defined the facility column to be as the POS Facility on the encounter.

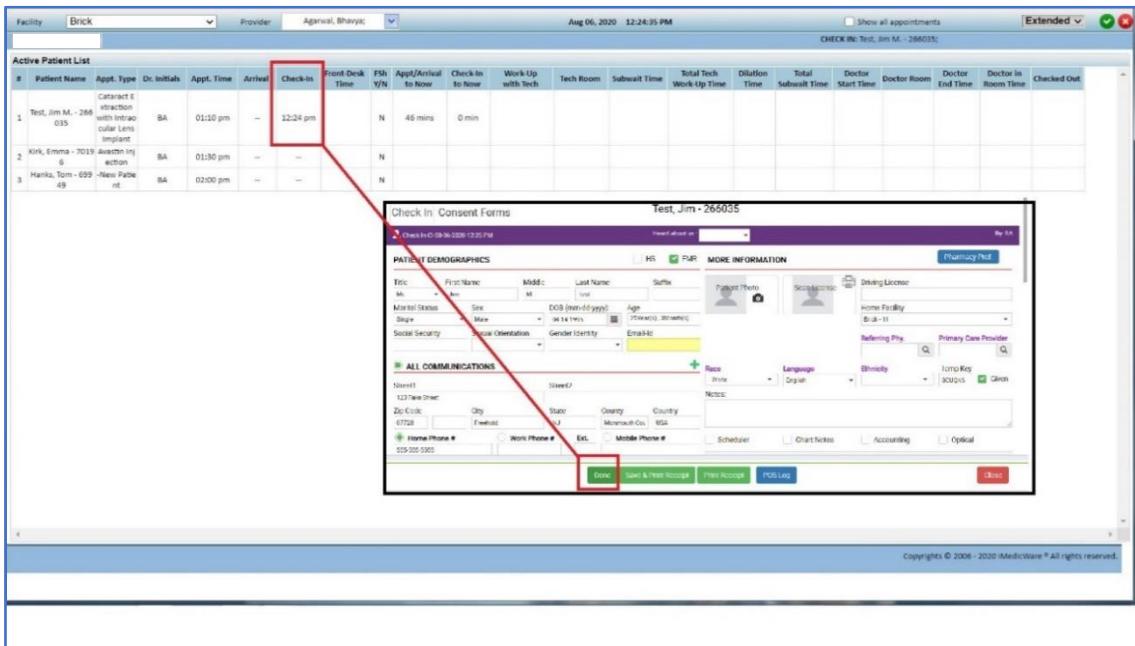
The screenshot shows two overlapping windows. The top window is titled 'AR Worksheet' and displays an AR report for patient Smith, Carol - 2157. The bottom window is titled 'Service Charges' and shows an encounter record for the same patient. Both windows have a red box highlighting the 'POS Facility' field. In the Service Charges window, the 'POS Facility' field is set to 'Toms River'. Other fields like 'Ref. Physician' and 'Control #' are also visible.

**R Column** - Display "Y", when the claim receives a rejection from the Clearing House or when the Reason code posted on the claim has the Action Type as Denied. The user can hover over the "Y" and see which rejection code has been posted for the same.

When the practice has resubmitted the claim, the column would go back to blank.

## iMedic Monitor

**iMedic Monitor Check-In Timer** – the clock timer and counter for the Extended view of iMedic Monitor now triggers the Check-In screen – when the user selects Done – this starts the clock on the IMM Extended view.



**iMedic Monitor** – we added a column to the Extended View of the monitor to show the Provider initials. You will identify the provider in this column and this column can also be sorted to allow you to see groups of appointments by the provider.



**iMedic Monitor** – we can now sort the Appointment Type and Provider Initials columns.

The screenshot shows a software interface titled "iMedic Monitor". At the top, there are dropdown menus for "Facility" (set to "Brick"), "Provider" (set to "Agarwal, Bhavya"), and "Extended". The date and time are displayed as "Aug 06, 2020 3:03:23 PM". There is a checkbox for "Show all appointments" and a "CHECK IN: Test, Jim M. - 260035" button. The main area is titled "Active Patient List" and contains a table with the following data:

#	Patient Name	Appt. Type	Dr. Initials	Appt. Time	Arrival	Check-in	Front Desk Time	FSN Y/N	Appt/Arrival to Now	Check-In to Now	Work-Up with Tech	Tech Room	Subwait Time	Total Tech Work Up Time	Dilation Time	Total Subwait Time	Doctor Start Time	Doctor Room	Doctor End Time	Doctor in Room Time	Checked Out
1	Test, Jim M. - 260035	Cataract Extraction with IOL	BA	11:00 pm	--	12:24 pm		N	1 hr 53 mins	2 hrs 39 mins							12:45 pm	N/A	01:33 pm	15 mins 33 seconds	
2	Kirk, Emma - 706	Avastin Injection	BA	1:30 pm	--	--		N													
3	Hanks, Tom - 694	New Patient	BA	2:00 pm	--	--		N													

**iMedic Monitor Dilation Timer** – if there has been No Dilation completed for the patient then the AR Worksheet column for Dilation Time will always show as NA.

The screenshot shows the "Anesthetic" and "Dilation" sections of the iMedic Monitor software. The "Anesthetic" section includes rows for Alcaine, Fluorescein St., Fluorocaine, Fluress 1%, Proparacaine, Tetracaine, Cyclogyl 1%, Mydriacyl 1%, Mydriacyl 1/2%, Paremyd, and Phenylephrine. The "Dilation" section includes a "NO DILATION" button, radio buttons for OU, OD, and OS, and a "Dilation Time S" field containing "N/A". A red box highlights the "NO DILATION" button, and a red arrow points from it to the "Dilation Time S" field.

If no dilation is done then the clock should never start. Currently the system is starting the timer regardless of the status of the dilation. Either action Dilation or No Dilation the timer is starting and accumulating.

ONLY when the patient is dilated should the timer turn on.

## ASC

**Appointment History** – we added the ability to see the Appointment Hx from within the ioLink screen area.

The screenshot shows the ioLink software interface with the following components:

- Top Bar:** Includes buttons for To-Do, Delete-Patient, Upload-PDFs, iSync, Today, and a search bar labeled "io".
- Booking Sheet:** Shows a list of appointments for "Surgeon Dr. Surgeon John Test (1)". One appointment is listed: "Doe, Imw - 02/20/84" with the procedure "Cataract Extraction with Intraocular Lens Implant (OD)". Status icons include red X's and green checkmarks.
- Patient Detail:** A calendar for July 2020 is displayed. A blue arrow points from the "Appt Hx." button in the Patient Detail section to the "Appointment History" link in the navigation bar below.
- Patient Detail Form:** Displays patient information: Name (Imw Doe), Title (First Name: Sam), MI (M), Last Name (Doe), Sex (M), DOB (02-20-1984), Address1, Address2, Home Phone#, and Work Phone#.
- Appointment History:** A table showing appointment details for "Doe, Imw Sam - 02/20/1984". It includes columns for DOS & Time, Check In, Check Out, Location, Provider, Procedure, Notes, and Op. The table shows two entries:

DOS & Time	Check In	Check Out	Location	Provider	Procedure	Notes	Op.
07-08-2020 09:00 AM			Surgery Center	Test, Surgeon John	Cataract Extraction with Intraocular Lens Implant		IT
06-24-2020 10:00 AM			Surgery Center	Test, Surgeon John	Cataract Extraction with Intraocular Lens Implant		IT

**Incomplete Report** – we have created a new report for the ASC. Reports > Incomplete Report. This will allow you to select either the surgeon, anesthesiologist or nurse – set the date range and see the charts that are open and incomplete. From here the user can print the report and then simply go back to each chart and complete them.

**Surgery Center**

**Audit**

**Incomplete Chart Report**

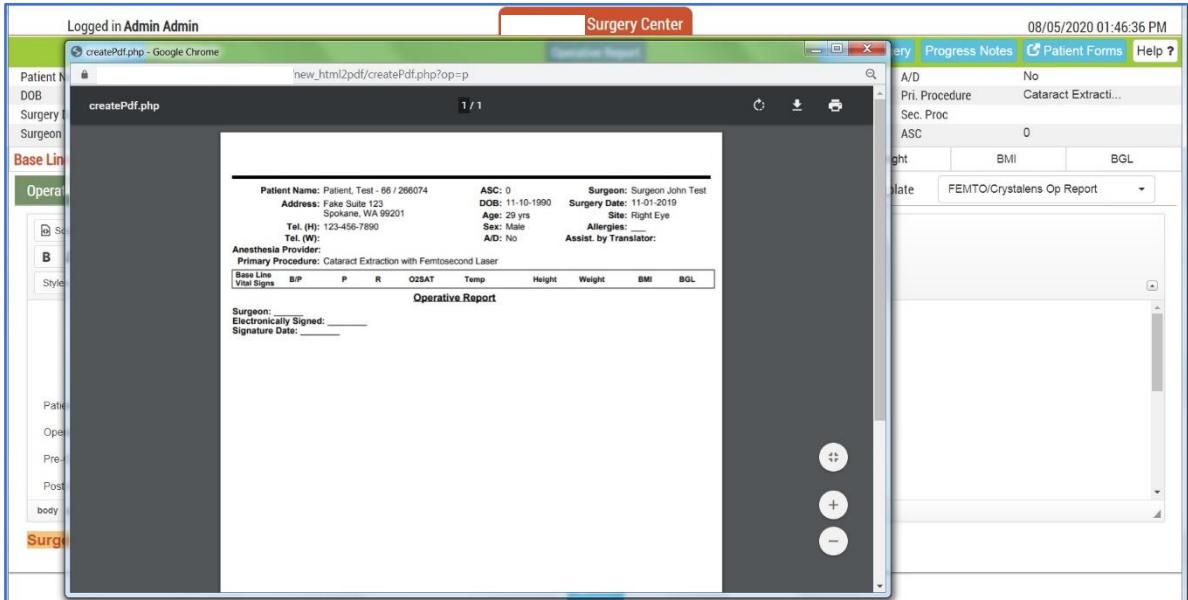
Surgeon Name: Surgeon John Test	Created On: 07-29-2020			
Seq	Patient Name - ASCID	DOB	Procedure	Incomplete Charts
1	Doe, AAO - 0	10-13-1954	Cataract Extraction with Intraocular Lens Implant	Operating Room + Intra-Op Record
2	Doe, Fava - 622	12-16-1959	Cataract Extraction with Intraocular Lens Implant	Pre-Op Health + H & P Clearance Anesthesia + MAC/Regional Operating Room + Intra-Op Record
3	Imw, Doe - 624	05-23-1949	Anesthesia for Vitreoretinal	Anesthesia
4	TweOTwoOne, Test - 629	05-25-1980	Cataract Extraction with Intraocular Lens Implant	Pre-Op Health + H & P Clearance
5	TweOTwoOne, Test - 0	05-25-1980	Cataract Extraction with Intraocular Lens Implant	Pre-Op Health + H & P Clearance
6	Testing, IMW - 0	02-14-1995	CORNEAL TRANSPLANT	Pre-Op Health + H & P Clearance
7	Doe1, IMW - 0	02-04-1981	Cataract Extraction with Femtosecond Laser	Pre-Op Health + H & P Clearance

**Post-Op Orders** – we have added the ability for the Surgeon's Post-Ops to be changed and modified. Those orders are then available on the Nurse Post-Op screen to enable the ability to record the time the medication was dispensed. RED area shows Post-Op orders screen and the GREEN below shows the corresponding orders on the Post-Op nursing record.

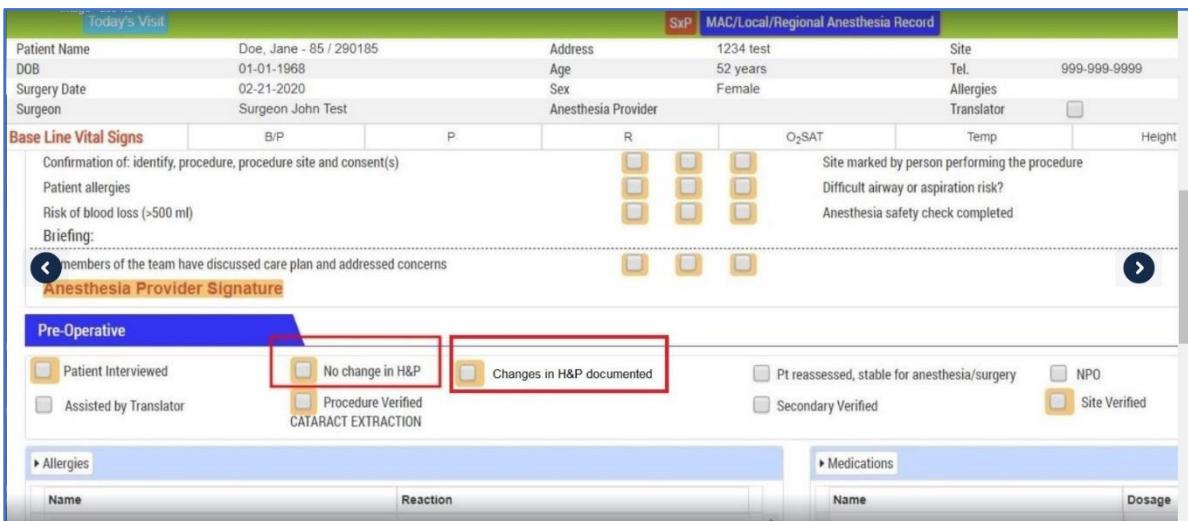
**Post-Op Physician Orders**

**Post-Op Nursing Record**

**Operative Report** – this was cleaned up and the repeated header was removed.



**Anesthesia Record modified** – we added a new field to the screen “Changes in H&P documented”. This is a checkbox added which toggles off the existing checkbox “No Change in H&P” – you must make a single selection because either field is exclusive and mandatory for documentation. This selection will also update the Preference card accordingly.



**Patient status** – we added a field to the Scheduler on the ASC side where we have now included a new option under status called “Aborted Surgery”. This is represented in the same list as Check-in, Scheduled, Cancelled, No Show and new is Aborted Surgery.

Patient Search Results										
Surgery Center										
Signed	Patient Name	DOS	Surgery	Procedure	Status	Comments	Scan	Edit	Epost	
	Patient, Test D (11/10/1990)	11-01-2019	09:10 AM	Cataract Extraction with Femtosecond Laser OD	Scheduled		Save			
---	Test, New5	03-28-2020	09:00 AM	Botox	No Show		Save			
	Test, Iolink (12/31/2019)	01-26-2020	09:00 AM	Cataract Extraction with Femtosecond Laser OD	Scheduled		Save			
	Test, Qa (12/31/2019)	01-09-2020	09:00 AM	Cataract Extraction with Femtosecond Laser OU N/A OU	CI - 05:18 AM		Save			
	Test, Tammie (04/02/2001)	05-17-2019	01:30 PM	Cataract Extraction with Intraocular Lens Implant OD	Scheduled		Save			
	Test, Jim M. (04/14/1995)	05-17-2019	02:00 PM	Laser Yag Capsulotomy OD	Scheduled		Save			
	Test, Gwydion (03/20/1989)	05-17-2019	02:15 PM	Laser Yag Capsulotomy OS	Scheduled		Save			
	Test, IMW (10/01/1958)	05-17-2019	12:30 PM	Cataract Extraction with Femtosecond Laser OD	Cancelled		Save			
	Test, Jim M. (04/14/1995)	05-15-2019	11:50 AM	Cataract Extraction with Femtosecond Laser OS	Scheduled		Save			
---	Test, IMW (10/01/1958)	03-27-2019	12:40 PM	Follow Up	Cancelled		Save			
	Test, IMW (10/01/1958)	03-27-2019	03:35 PM	Follow Up	Cancelled		Save			
---	Test, IMW (10/01/1958)	03-27-2019	03:50 PM	Follow Up	Cancelled		Save			

**Post-Op Aldrete score** – we have added the ability to record multiple Aldrete scores and can display these within the Nursing Post-Op record.

Logged in Nurse Test																																		
Today's Visit																																		
Surgery Center																																		
Post-Op Aldrete Scoring System																																		
Ocular Surgery Progress Notes Patient Forms Help ?																																		
Patient Name	Doe, Able - 89 / 70589		Address	64 East Main ...		Site	Right Eye	A/D	Pri. Procedure	Cataract Extracti...																								
DOB	01-01-1990		Age	30 years		Tel. (H)	732-817-9475	Sec. Proc.	N/A	<input checked="" type="checkbox"/>																								
Surgery Date	05-22-2020		Sex	Male		Tel. (W)		Allergies	Translator	<input checked="" type="checkbox"/>																								
Surgeon	Surgeon, John Test		Anesthesia Provider	Anes Test		ASC	629																											
Base Line Vital Signs	B/P	P	R	O <sub>2</sub> SAT	Temp	Height	Weight	BMI	BGL																									
Summary - Post-Op Aldrete Score																																		
S.No.	Date	Time		Score	Recorded by	Comment																												
1	05-21-2020	05:50 AM		6	Admin, Admin																													
<b>1</b>																																		
<table border="1"> <tr> <td><b>Activity</b></td> <td><b>Point(s) Earned</b></td> </tr> <tr> <td><input type="checkbox"/> Able to move 4 extremities voluntarily on command</td> <td>1 Point(s)</td> </tr> <tr> <td><input checked="" type="checkbox"/> Able to move 2 extremities voluntarily on command</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Able to move 0 extremities voluntarily on command</td> <td></td> </tr> <tr> <td><b>Consciousness</b></td> <td><b>Point(s) Earned</b></td> </tr> <tr> <td><input checked="" type="checkbox"/> Fully awake</td> <td>2 Point(s)</td> </tr> <tr> <td><input type="checkbox"/> Arousable on calling</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Not responding</td> <td></td> </tr> <tr> <td><b>Color</b></td> <td><b>Point(s) Earned</b></td> </tr> <tr> <td><input checked="" type="checkbox"/> Normal</td> <td>2 Point(s)</td> </tr> <tr> <td><input type="checkbox"/> Pale, dusky, blotchy, jaundiced, other cyanotic</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Cyanotic</td> <td></td> </tr> </table>											<b>Activity</b>	<b>Point(s) Earned</b>	<input type="checkbox"/> Able to move 4 extremities voluntarily on command	1 Point(s)	<input checked="" type="checkbox"/> Able to move 2 extremities voluntarily on command		<input type="checkbox"/> Able to move 0 extremities voluntarily on command		<b>Consciousness</b>	<b>Point(s) Earned</b>	<input checked="" type="checkbox"/> Fully awake	2 Point(s)	<input type="checkbox"/> Arousable on calling		<input type="checkbox"/> Not responding		<b>Color</b>	<b>Point(s) Earned</b>	<input checked="" type="checkbox"/> Normal	2 Point(s)	<input type="checkbox"/> Pale, dusky, blotchy, jaundiced, other cyanotic		<input type="checkbox"/> Cyanotic	
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<table border="1"> <tr> <td><b>Respiration</b></td> <td><b>Point(s) Earned</b></td> </tr> <tr> <td><input type="checkbox"/> Able to breathe deeply and cough freely</td> <td>0 Point(s)</td> </tr> <tr> <td><input type="checkbox"/> Dyspnea or limited breathing</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/> Apneic</td> <td></td> </tr> <tr> <td><b>Circulation</b></td> <td><b>Point(s) Earned</b></td> </tr> <tr> <td><input type="checkbox"/> B/P +/-20% of preanesthetic level</td> <td>1 Point(s)</td> </tr> <tr> <td><input checked="" type="checkbox"/> B/P +/-20% to 50% of preanesthetic level</td> <td></td> </tr> <tr> <td><input type="checkbox"/> B/P +/-50% of preanesthetic level</td> <td></td> </tr> </table>											<b>Respiration</b>	<b>Point(s) Earned</b>	<input type="checkbox"/> Able to breathe deeply and cough freely	0 Point(s)	<input type="checkbox"/> Dyspnea or limited breathing		<input checked="" type="checkbox"/> Apneic		<b>Circulation</b>	<b>Point(s) Earned</b>	<input type="checkbox"/> B/P +/-20% of preanesthetic level	1 Point(s)	<input checked="" type="checkbox"/> B/P +/-20% to 50% of preanesthetic level		<input type="checkbox"/> B/P +/-50% of preanesthetic level									
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<table border="1"> <tr> <td><b>Total Point(s) Earned</b></td> <td><b>6 Point(s)</b></td> </tr> </table>											<b>Total Point(s) Earned</b>	<b>6 Point(s)</b>																						
<b>Total Point(s) Earned</b>	<b>6 Point(s)</b>																																	
Recorded by Admin, Admin on 05-21-2020 05:50 AM																																		

**Noting Complications on Operating room record** - On the Operating Room record of the Patient's visit, a new box has been added to note any complications which occurred during the Surgery.

The screenshot shows the 'Operating Room Record' interface. At the top, there are tabs for 'OCX', 'SxP', and 'Operating Room Record'. Below this, patient information is listed: Name (Doe, Athens - 90 / 70023), Address (123 Fake Stree..), DOB (08-16-1949), Age (70 years), Surgery Date (08-07-2020), Sex (Male), and Surgeon (Surgeon John Test). Anesthesia Provider is listed as 'Anesthesia Provider'. The 'Base Line Vital Signs' section includes fields for B/P, P, R, O<sub>2</sub>SAT, and Temp, along with a list of medications. A 'Comments' section is also present. The 'Complications' section is highlighted with a red box. Other sections include 'Post Op Orders', 'Nurse Notes', and 'Others Present'.

User can define a list, from which one can select the appropriate complication. To define the list go to, Admin > Pre-Define > Complications.

The screenshot shows the 'Pre-Define' section in the Admin interface. The 'Complications' button is highlighted with a red box. Other buttons in the grid include Allergies, Chart Unlock, History and Physical, Dentition, Diagnosis ICD10, Diagnosis ICD9, Evaluation, Health Questionnaire, Laser Exposure, IOL Manufacturer, Intra Op Post Op Orders, Laser Chief Complaint, Laser Count, Laser Degree of Opening, Laser Power/Wattage, Laser Fundus Exam, Laser Hx. of Present Illness, Laser Mental State, Laser Past Medical Hx, Laser Post Op Orders, Laser Total Energy, Laser Progress Note, Laser SLE, Laser Shots, Laser Spot Duration, Laser Spot Size, Modifiers, List of food & drinks, Mac/Regional Questions, Manufacturer Lens Brand, Medications, Model, Post-Op evaluation, Nourishment Kind, Nurse Post-Op Checklist, Operating room nurses notes, Physician Orders, Post-Op Drops, Procedures, Procedures Category, Practice Name, Pre-Op Nurse, Pre-Op Nurse Category, Pre-operative comments, Procedures Group, Quality Measures, Recovery comments, Site, Specialty, Supplies Used, Supply Categories, Surgical Pack, and Zip Codes.

From here the user can add/modify/delete any complication.

Surgery Center

Complications	Del	Default	Complications	Del	Default	Complications
Aphakia	<input type="checkbox"/>	<input type="checkbox"/>	Dislocated IOL	<input type="checkbox"/>	<input type="checkbox"/>	
Glaucoma	<input type="checkbox"/>	<input type="checkbox"/>	Subluxed IOL	<input type="checkbox"/>	<input type="checkbox"/>	
Zonular Dialysis	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	

Add New Save Delete Close

Complications noted on the Operative Room Record of the Chart would also be printed.

Surgery Center

Operating Room Record	Ocular Surgery
Site: Right Eye Tel. (H): 987-654-3210 Sex: Male Anesthesia Provider: Allergies: Translator: <input type="checkbox"/> ASC:	
Base Line Vital Signs   B/P   P   R   O <sub>2</sub> SAT	
Intra Op Inj   Complications   Anesthesia Service	
<input type="checkbox"/> Solumedrol <input type="checkbox"/> Dexamethasone <b>Complications</b> Aphakia Dislocated IOL Glaucoma Subluxed IOL Zonular Dialysis Yes <input type="checkbox"/> No <input type="checkbox"/> N/A ▶ Complications: Dislocated IOL, Glaucoma ▶ Post Op Orders ▶ Nurse Notes Others Present Scrub Tech 1: Select Nurse: Circulating: Select Surgeon: Signature Finalize	Solumedrol: _____ Ancef: _____ Dexamethasone: _____ Gentamicin: _____ Kenalog: _____ Depomedrol: _____ Vancomycin: _____ Trimox: _____ XylocaineMPF: _____ Miostat: _____ PhenylIodo 1.5%: _____ Other: _____ Patch: _____ Shield: _____ Needle/Suture count: _____ Correct: _____ <b>Complications: Dislocated IOL, Glaucoma</b> Post Op Orders: _____ Nurse Notes: _____ Others Present: _____ Vital Signs Time: B/P   Systolic   Diastolic   Pulse   RR   Temp °C   EtCO <sub>2</sub>   OSat   Electronically Signed Scrub Tech 1: _____ Circulating Nurse: _____ Electronically Signed: No Surgeon: _____ Electronically Signed: _____ Signature Date: _____ Nurse: Electronically Signed: _____ Signature Date: _____ Scrub Tech 2: _____ Electronically Signed
Save   Cancel   Print   Save & Print   Print EMR	

Complications as a column has also been added on the Surgery Log Book report.

The screenshot displays two main sections of the iASC EMR interface:

- Surgery Log Book:** A grid showing surgery logs from July 1, 2020, to July 22, 2020. One row is highlighted with a blue border, and a red box highlights the "Complications" field, which contains "Dislocated IOL Glaucoma".
- Operating Room Record:** A detailed form for a patient named Doe, Imw - 26 / 266210. It includes sections for Intra Op Inj (with checkboxes for various medications), Anesthesia Service (checkboxes for service types), and Vital Signs (with a table for blood pressure, pulse, RR, Temp, and ETCO2). The "Complications" field in the O.R. record also contains "Dislocated IOL Glaucoma".

**Arrival Time as a Variable** - Arrival Time as a variable is now present for iASC EMR. This can be included as part of the following templates under Admin:

- Consent Forms
- Op-Report
- Instruct Sheet

The template is updated, but the user must go to the template, open it once and Save it. On the template where this variable has been added, the actual Arrived time (if marked) would be seen there.

## More Options Under Anesthesia Services - Under Patient Today's Visit > Operating Room Record, more options have been added under the Anesthesia Service. General - IV Sedation

When selected these would print on the printed chart and would be captured on the Surgery Logbook.

Logged in Angela King      Surgery Center      04/02/2020 09:32:27 AM

Patient Name: Woody, Leroy - 4010049 / 69178      Address: 5880 Briar Co., Site: Right Eye      A/D: No  
DOB: 03-02-1960      Age: 60 years      Tel.: 770-540-9964      Pri. Procedure: y1 CEIOL  
Surgery Date: 04-02-2020      Sex: Male      Allergies:      Sec. Proc:  
Surgeon: Niraj Desai      Anesthesia Provider: Translator:  ASC: 0

**Base Line Vital Signs**

B/P	P	R	O <sub>2</sub> SAT	Temp	Height	Weight	BMI
-----	---	---	--------------------	------	--------	--------	-----

**Intra Op Inj**

Solumedrol						
Dexamethasone						
Kenalog						
Vancomycin						
Xylocaine MPF						
Phenyl/Lido	1.5%/1%					
Patch:	No	Shield Needle/Suture count:	Correct	Yes	No	N/A

**Post Op Orders**

**Nurse Notes**

**Anesthesia Service**

- Full Anesthesia service provided
- No Anesthesia service provided
- Block
- Local
- Topical
- General
- IV Sedation

**Comments**

**Vital Signs**

Time	B/P	Pulse	RR	Temp° C	ECO <sub>2</sub>	O <sub>2</sub> Sat <sub>2</sub>
	Systolic	Diastolic				

**Buttons:** Finalize, Save, Cancel, Print, Save & Print, Print EMR

Logged in Nurse Test      Surgery Center      05-22-2020 08:25 AM

Patient Name: Doe, Able - 89 / 70569      Address: 64 East Main      Site: Right Eye      A/D: Cataract Extract...  
DOB: 01-01-1990      Age: 30 years      Tel. (h): 732-817-9475      Pri. Procedure: Cataract Extract...  
Surgery Date: 05-22-2020      Sex: Male      Tel. (w):      Sec. Proc:  
Surgeon: Surgeon John Test      Anesthesia Provider: Anes Test      Allergies:      ASC: 629  
Translator:

**B** [Create/Print - Google Chrome](#)

**IKO and/or Consent Confirmed**

**Nurse Test/Nurse**  
Electronically Signed Yes  
Signature Date: 05-27-2020 08:25 AM

**Prep Solutions**

None	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Betadine 10%	<input type="checkbox"/> Saline	<input type="checkbox"/> Alcohol
	<input type="checkbox"/> 5% Betadine gtt	<input type="checkbox"/> Prapacaine	<input type="checkbox"/> Tetracaine	<input type="checkbox"/> Tetravisc

**Other**

**Anesthesia Service**

- Full Anesthesia service provided
- No Anesthesia service provided
- Block
- Local
- Topical
- General
- IV Sedation

**Comments**

**Vital Signs**

Time	B/P	Pulse	RR	Temp° C	ECO <sub>2</sub>	O <sub>2</sub> Sat <sub>2</sub>
	Systolic	Diastolic				

**Buttons:** Admin, Reports, Export CSV, Reset

**Surgery Log Book**

Surgeon	ASC
All	All
Select Date	
From: 05-22-2020	To: 05-27-2020
<a href="#">Export CSV</a> <a href="#">Reset</a>	

**surgery\_log\_book\_print (2).csv**

Seq	Date	Surgery Type	Medic/Nur Patient Firs	Patient Las/I	Age	Sex	Race	County	Surgeon	Assistant	Circulator/CRNA	Procedure	Diagnosis	Anesthesia	Time-In	Time-Out	Total	Surgery Car Hospital
1	5/22/2020	88	70593 AEC	Doe	66 Male	Monmouth	Test, Surgeon John					Cataract Extraction with Femtosecond Laser						
2	5/22/2020	89	70589 Able	Doe	30 Male	Douglas	Co. Test, Surge. Test, Nurse					Cataract Extraction with Intracular Lens Implant	IV Sedation	5:47 AM				
3	5/22/2020	70164 ArkEye	Doe	67 Male	Monmouth	Test, Surgeon John					Cataract Extraction with Femtosecond Laser							

**Blood Sugar normal Range** - According to JCI requirements the normal range of Blood Sugar level need to be displayed on the Chart. This is now showing on the Today's Visit > Nursing Record > Pre- Op.

The screenshot shows the 'Today's Visit' tab selected. At the top, patient details are listed: Name (Doe, Athens - 90 / 70023), Address (123 Fake Stree..), DOB (08-16-1949), Age (70 years), Surgery Date (08-07-2020), Sex (Male), and Surgeon (Surgeon John Test). Below this is a section for 'Base Line Vital Signs' with fields for B/P, P, R, O<sub>2</sub>SAT, and Temp. A note at the bottom states: '\*\*Normal blood glucose level is lower than 140 mg/dL (7.8 mmol/L)'.

On the right side, there are several checkboxes for health status: Arrival Time, Food or Drink Today, Lab Test, EKG, Consent Signed, H & P, Admitted To Hospital in Past 30 Days, Blood Sugar (which is checked and labeled 'N/A'), and a group of nine checkboxes for various medical conditions. There are also dropdown menus for Height (Ft) and Weight (lb/in).

**Medication Order Time Stamp** - Under the Physician Post Op Order, when selecting a Medication, the time stamp would be noted for reference at a later stage.

The screenshot shows two main sections: 'Post-Op Physician Orders' and 'Post-Op Nursing Record'.

**Post-Op Physician Orders:** A list of medications with their times: Tobradex 1 gtt (06:13 AM) and Zofran(Ondansetron) 4mg I.V. (06:15 AM). An arrow points from the 'Time' column in the orders to a dropdown menu in the 'Order Type' section of the interface.

**Post-Op Nursing Record:** Shows vital signs and a pain level section. The 'Time' column for the medications in the orders section is highlighted with a blue box and an arrow pointing to it.

**Signed document from iOLink to iASC** - When a consent form is signed on iOLink itself, the document would lock when being sent over to iASC, the user would not have the option to modify it in any way. They can only Print it.

The Consent signed in iOLink would show as follow in iASC.

The screenshot shows a consent form in iASC. At the top, there's a header with tabs for "Today's Visit", "Patient Attestation", "Ocular Surgery", "Progress Notes", "Patient Forms", and "Help ?". Below the header, patient details are listed:

Patient Name	Doc, Athens - 90 / 70023	Address	123 Fake Stree..	Site	A/D	No
DOB	08-16-1949	Age	70 years	Tel. (H)	Pri. Procedure	-New Patient
Surgery Date	08-07-2020	Sex	Male	Tel. (W)	Sec. Proc	
Surgeon	Surgeon John Test	Anesthesia Provider		Allergies <input checked="" type="checkbox"/>	Translator <input type="checkbox"/>	ASC 0

Below this is a table for "Base Line Vital Signs" with columns for B/P, P, R, O<sub>2</sub>SAT, Temp, Height, Weight, BMI, and BGL. A note says "If you have Advanced Directives, you are responsible to bring a copy the day of surgery".

Under "Physician Ownership of Surgery Center:" is a list: "D. James Schumer, MD".

At the bottom left, there's a handwritten signature. Below it, the text "Signature Date: 08-07-2020 06:52 AM" and "Patient's Signature" are displayed. To the right, the date "Date: 08-07-2020" is shown.

At the very bottom are buttons for "Finalize" (blue), "Cancel" (red), "Print" (blue), "Print EMR" (blue), and "Purge" (orange).

## Optical

**Order without CYL – you can now create, save and order the prescription without there being any values having to be plugged into the CYL and Axis fields.**

The screenshot shows the Eye Associates software interface for optical prescriptions. The top navigation bar includes 'Test, Jim M. - 266035 A/C Status: Active' and 'Home: 555-555-5555'. The search bar shows 'Eye Associates 0' and 'Agarwal, Bhavya optical' with a search button. The left sidebar has links for Demographics, Point of Sale (selected), Billing, Inventory, Order Tracking, Admin, and Reports. The main frame selection panel shows 'Frame Selection' and '08-06-2020'. The lens selection panel shows 'Lens Selection', 'Last Exam: 08-06-2020', and 'Prescribed By:'. The prescription grid shows rows for OD and OS lenses. The OD row contains fields for Seg Type (Progressive), Design (AO Easy), Material (1.5 Plastic), Treatment (AR Tint UV package), and comments. The OS row contains similar fields. The prescription grid also includes columns for SPH, CYL, AXIS, VA, ADD, and VA. The bottom section shows a table of items with columns for Item, Description, Code, Unit Cost, Unit, T. Unit Cost, Ins. Resp, Discount, Pt Paid, Pt Resp, Discount %, Self Pay, and Tax. Buttons at the bottom include Previous, Cancel, Save, Print Order, Patient Receipt, Post, and a timestamp '08/06/20 01:01:21 PM'.

Item	Description	Code	Unit Cost	Unit	T. Unit Cost	Ins. Resp	Discount	Pt Paid	Pt Resp	Discount %	Self Pay	Tax
OD	Design	AO Easy	V2520	\$ 0.00	1 \$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Please Sel	Self Pay	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
OD	Material	1.5 Plastic	V2782	\$ 0.00	1 \$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	Please Sel	Self Pay	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

The Optical Stock Reconciliation report was not printing out the dollar values on the report. It showed correctly on the screen, but didn't display them on the report. This is fixed and now dollar values are printing and displaying proper on report.

createPdf.php

1 / 1

Stock Reconciliation Report			Facility : Optical		Operator : All		Created by BA on 07-27-2020 14:45				
Sr.#	UPC Code	Product Type	Product Name	Vendor	Brand	T.Qty.	Qty.F	Qty.	Reason	Facility	Opr.
1	123321	frame	a		3M	0	0	1	optical	SD	
2	951951	frame	1		3M	0	0	1	optical	SD	
3	1	lenses	1			0	0	1	optical	SD	
4	407797006183	frame	Maxx Eyewear		Eight to Eighty	1	1	5	optical	PD	
5	407797006183	frame	Maxx Eyewear		Eight to Eighty	1	1	1	optical	PD	
6	5053501000180	frame	Black Label		William Morris	1	1	4	optical	PD	
7	5053501000180	frame	Black Label		William Morris	1	1	1	optical	PD	
8	78749845	medicine	Avastin	Aim Optics		10	10	1	Reset on reconcile	optical	PD
9	10004	contact lenses	Acuvue Advance Plus 8.7 24 PK		Acuvue Advance Plus 8.7 24 PK	0	0	1	optical	PD	
10	10002	contact lenses	Acuvue Advance Plus 8.7 6PK		Acuvue Advance Plus 8.7 6PK	0	0	1	optical	PD	
11	10000	contact lenses	Acuvue Advance Astigmatism 6PK		Acuvue Advance Astigmatism 6PK	0	0	1	optical	PD	
12	054917308339	frame	Bolle Sport Protective		Bolle	0	0	1	Manual Reset	optical	PD
13	054917308360	frame	Bolle Sport Protective		Bolle	0	0	1	Wrong Item Added	optical	PD
14	054917308353	frame	Bolle Sport Protective		Bolle	0	0	1	optical	PD	

**Summary**

Product Type	Int. Qty.	F. Qty.	Rec. Qty.	Int. Amount	Adj. Amount	Total Rec. Amount
Frame	4	4	12	\$0.00	\$125.00	\$125.00
Lenses	0	0	1	\$0.00	\$0.00	\$0.00
Medicine	10	10	-9	\$100.00	\$-90.00	\$10.00
Contact Lenses	0	0	3	\$0.00	\$60.00	\$60.00

Search Print 07/27/20 02:50:42 PM