What's New in 9.5.25-9.5.27

March

2017

This document was developed by Genius Solutions to introduce users to the features/modifications that have been released in 9.5.25 - 9.5.27 of eTHOMAS. Click on the text or page numbers within the Contents page to be brought to that specific item within the document.
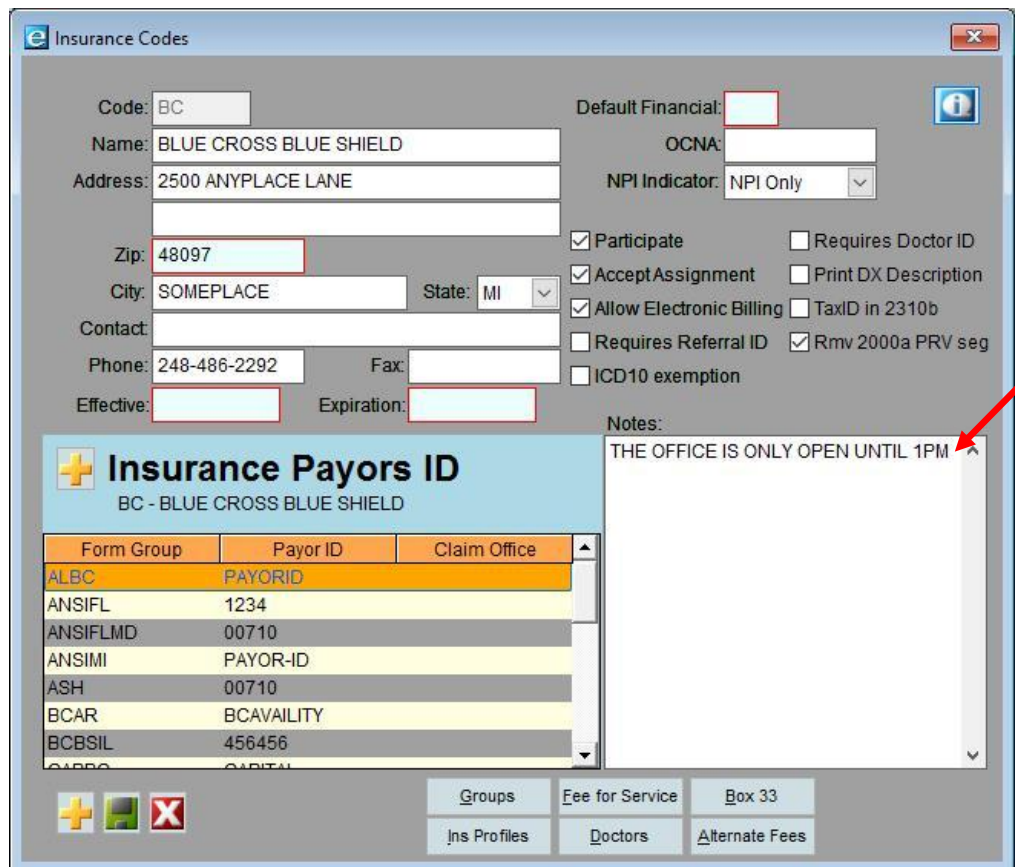
eTHOMAS

Contents

Release Introduction

Our latest version, at the time of this publication, is version 9.5.27. In order to take full advantage of the features outlined within this document, eTHOMAS will need to be updated to that version. Verify your version number by looking in the upper right corner of eTHOMAS.

Code Files

Notes on Insurance Codes

You can now add notes to an insurance code within Code Files | Insurance | Insurance. This field can be used to store informational notes regarding this insurance company.

Reports

Modifier in Excel for Service Analysis Report

The modifiers attached to each transaction will now be included when exporting the Service Analysis Report to Excel.

Patient Type on the Deposit Sheet

A new system setting has been added called DepositPatType. This setting will print patient type on the Deposit Sheet. To enable this setting, enter the value as 1, otherwise to disable setting, leave value blank.

DEPOSIT SHEET

Location System Summary Doctor System Summary Date From 03/15/2017 To 03/15/2017 Use Service Date

Service Date 03/15/2017 Wednesday

Name/AcctNo	Claim#	Source	Refund	Paid
Account Paid				
MOUSE, MICKEY M - 14		Cash		50.00
Patient Type: HYPOGLYCEMEIC				

Cash Totals:	1	0.00	50.00
Account Paid Totals:		0.00	50.00
03/15/2017 Day Totals:		0.00	50.00
Grand Total:		0.00	50.00

Insurance Percent Report

A new report has been created called the "Insurance Percent Report". This report will detail how many policies are in the system based on the patient's last visit date. This report will only find policies that are active, and in policy numbers 1-3. This report will run by the location and doctor from the patient information. In order to gain access to this report you must give your security group access to this report under the Reports Category by going to Utility | Settings | Groups.

The fields available are:

- **Detail** – Check this box if you would like to see the patient names and last visit dates that correspond with the insurance.
- **Location**- You may run this report by System Summary, All Locations or a specific location.
- **Doctor Code** - You may run this report by System Summary, All Doctors or a specific doctor code.
- **Date From/Date To** – Enter the date range of the patients' last visit date. This report will only pull active patients with active policies.
- **Financial Code** – (optional) Enter a financial code to get results for only that code.
- **Insurance Code** – (optional) Enter an insurance code to get results for only that code.
- **Policy Type** – Choose whether to find Primary, Secondary or Tertiary policies.

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INSURANCE PERCENT REPORT

Location System Summary   Doctor System Summary
Last Visit Date: 12/07/2016 To 12/07/2016 Policy Type: PRIMARY

Financial Code:	BC		Num of Policies	Percent
	Insurance Code: BC - BLUE CROSS OF MI		1	20.000 %
	Insurance Code: BCBSM - BLUE CROSS BLUE SHIELD MI		2	40.000 %
	Financial Code: BC - BLUE CROSS/BLUE SHIELD	Totals: 3		60.000 %
Financial Code:	MR		Num of Policies	Percent
	Insurance Code: MC - MEDICARE HCSC		1	20.000 %
	Financial Code: MR - MEDICARE	Totals: 1		20.000 %
Financial Code:	OT		Num of Policies	Percent
	Insurance Code: AFLAC - AFLAC MEDICARE SUPP PLAN		1	20.000 %
	Financial Code: OT - COMMERCIAL INSURANCE	Totals: 1		20.000 %
		Grand Total: 5		100.000 %

Insurance Percent Report

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INSURANCE PERCENT REPORT

Location System Summary   Doctor System Summary
Last Visit Date: 12/07/2016 To 12/07/2016 Policy Type: PRIMARY

Financial Code:	BC				
Insurance Code: BC	Account	Name		Date of Last Visit	
	422620	SOLUTIONS, CYNTHIA		12/07/2016	
Insurance Code: BC - BLUE CROSS OF MI			Totals: 1		20.000 %
Insurance Code: BCBSM	Account	Name		Date of Last Visit	
	230	GENIUS, FRANK		12/07/2016	
	401010	SOLUTIONS, JEANETTE		12/07/2016	
Insurance Code: BCBSM - BLUE CROSS BLUE SHIELD MI			Totals: 2		40.000 %
Financial Code: BC - BLUE CROSS/BLUE SHIELD			Totals: 3		60.000 %
Financial Code:	MR				
Insurance Code: MC	Account	Name		Date of Last Visit	
	464620	SOLUTIONS, ALICE		12/07/2016	
Insurance Code: MC - MEDICARE HCSC			Totals: 1		20.000 %
Financial Code: MR - MEDICARE			Totals: 1		20.000 %
Financial Code:	OT				
Insurance Code: AFLAC	Account	Name		Date of Last Visit	
	260	GENIUS, MATTHEW		12/07/2016	
Insurance Code: AFLAC - AFLAC MEDICARE SUPP PLAN			Totals: 1		20.000 %
Financial Code: OT - COMMERCIAL INSURANCE			Totals: 1		20.000 %
			Grand Total: 5		100.000 %

Insurance Percent Report – With Detail

Multimedia

Scanning Patient Multimedia

The Multimedia feature allows you to store patient media such as pictures, documents, video clips, etc. that may be useful to your practice. Users now have the ability to scan documents directly into the program. To scan patient media, you must activate the system setting EnableEnhancedMedia with a value of 1.   From the patient screen, click on Notes on the left menu, and click on Multimedia to enter the Multimedia List screen. Click on the Add button to begin adding the new information into the patient's multimedia section.

The fields available are:

- **Date** - Enter a date or right click on the box to pick the date from the pop-up calendar.
- **File** - Click on the **Browse** button to select the media file that you want to store.
- **Description** - Enter a description of this patient media.
- **Notes** - (optional) Enter an additional note to clarify this patient media.
- **Claim No** – (optional) Browse to choose a claim to attach this media to, if it is claim specific.
- **Filename** – If scanning, you must enter the filename to be used when saving the file.
- **Scan** – Click this button to bring up the scanner feature. Follow the scanner's routine for scanning.

Click **Save** to save the patient media. After you save the patient media, you can go back to see the media by clicking on the Show Media button. In this example a patient's x-ray was stored in a PDF file and placed in the Multimedia feature.

If a claim number was chosen when adding the media, you can access that media from inside the claim by clicking on View Media. Only media that is attached to that claim will appear when clicking on **View Media**.

AutoPosting

AutoPost Validations

AutoPost Validations can be created to check transactions for specific information prior to AutoPosting payments. Any transaction that meets the criteria of the AutoPost Validation will appear as a message when a check is loaded for AutoPost. The AutoPost Validation can also change what happens to that transaction during the autoposting process.

To add a new AutoPost Validation, click on Billing | AutoPost Validation. Click the plus sign to add a new validation.

- **Description** - Enter the description of the validation.

- **Message** - Enter the message to remind the users when loading the checks.

- **If** - Choose the area you want the system to validate. Options are Financial Code, Insurance Code, Procedure Code, and Reason Code.

- **Is Equal to** - Define a specific code of the area you want the system to look at.

- **Then** - Define what the system will do when the defined code is encountered. Options are Leave as is, Transfer to Patient, and ParAdj Off.

  - **Leave as is** - This option will not change how the payment is being posted; It will only give a message when the check is loaded for AutoPosting.

  - **Transfer to Patient** - This option will transfer the monies to the patient using the TRABAL function.

  - **ParAdj Off** - This option will write off the monies using the PARADJ function.

AutoPosting validations only run on the last policy on the claim. For example, if a claim has Medicare primary and Blue Cross secondary, validations set up for Medicare will not apply to that claim.

An example of an AutoPost Validation would be when you want the system to validate the posting when Reason Code PR-27 is used and the patient has a BC financial code, to transfer the balance to the patient. To do so:

1. Select "Financial Code" from the **If** field.

2. Enter the in-house financial code in the **Is Equal to** field.

3. Select "Reason Code" from the **If** field.

4. Enter the reason code in the Is **Equal to field**.

5. Select "Transfer to Patient" in the **Then** field.

6. Click **Save** to save your setting.

Utility

Emergency Contact

Customers can now enter information for Genius Solutions to use to contact that person in the event of an emergency. This can be done under Utility | Settings | Contacts. This information is optional and should only be entered if the contact should receive emergency information.

Change Session

The ability has been added to change the session like you can change user or medsys. This allows the user to quickly change the session without logging completely out and back into eTHOMAS. To do this, click on Utility | Data | Change Session. The login screen will appear and a new session can be chosen.

Subscription Users

Offices who subscribe to monthly access to eTHOMAS now have an easier way to renew their monthly license. Please contact Genius Solutions at 586-751-9080 for more information.

Appointments

Appointment Reports

The patient's Preferred Method of Contact will now print on the appointment List style report.