

## What's New with Ophthalmology Advantage v11 (current release 11.0.5.0)

### GENERAL

#### Help Resources to ease the transition to Version 11:

- [What's New in Help for Version 11](#)
- Command Menu section
  - o There are new Command Menu topics with interactive images to help you acclimate to Version 11.
  - o Hover on an icon for a brief description or click on the icon for a link to more information.
  - o Menu mapping tables below the image list each action, how it was performed in v10.6 and how it is performed in v11.



- - o Look for this Compulink University icon on new and updated Help topics. It directs you to related courses on CU LMS.
  - o Click on the '+' next to the image in Help to display the Program, Course ID and Course Name to search for in the Course Catalog.

#### 'EHR Tour of the Version 11 Screens' in Compulink University LMS

- This new Program in CU LMS includes an overview of the Compulink-owned Exam Layouts for Version 11, as well as recordings for the individual screen tabs.
- Learn about the latest screens for your Advantage EHR from the designer.

#### New SHOWSCREEN Function for OpenOffice

- Offices interfacing with OpenOffice now have the ability to preview or edit documents generated from Functions or Data Mining/Query, before they are printed.
- Add the instruction -SHOWSCREEN- anywhere in your ODT document. Be sure to use this exact syntax.
- Select this document as the Output in your Function or Query.
- The results are combined into one large document and displayed on screen, allowing you to edit the merged text before printing or saving.

This instruction is ignored when printing documents from Patient or Exam.

#### Login and Security Enhancements

##### Login IDs

- The Position field in the Login IDs table has been changed to 'Role' and is now mandatory.
- The User is prompted to select their Role at Login if the field is empty in their Login ID record.
- Primary E-Mail is mandatory if the user is flagged for Learning Mgmt System 'Y' access to Compulink University LMS.

### **Scribes**

- The Login ID Role 'Scribe' has special functionality related to medical records.
- Users assigned to this Role are prompted to identify the Provider they are scribing for at Login.
- Medical Records Functionality associated with Scribes:
  - o If records the Scribe works on are not signed off, the Provider's name will appear on the Missing Signatures Report and Unsigned Medical Records Work List.
  - o Encounter Favorites for that Provider's ID are available, along with the Favorites for all Providers.

### **Login Profiles**

- A new consolidated Profile right named 'Ledger Charge Tables/Modifiers/POS/TOS' determines user access to Charge tables, Modifiers, Place of Service and Type of Service tables.

### **Compulink University LMS Course Catalogs**

([Click Here](#)) for the latest on-demand course offerings available for registration on the CU LMS Course Catalog.

### **System Setup > System Administrator**

#### **Auto Login based on Window Login (SSON)**

- A new System Administrator option called 'Allow Single Sign On' authenticates your Advantage users based on their Windows User Name and Password.
- If there is a match between the individual's Windows Login and the Advantage Login IDs table, they will be automatically logged into Advantage.
- The System Administrator must verify that a person or entity seeking access to electronic health information is the one claimed and is authorized to access such information.
- Be sure that the appropriate Login Profile Access Rights have been assigned to each User.
- Default is unchecked, to require each User to log in with their Advantage Login User Name and Password.

#### **Audit Events are now automatic.**

- The System Administrator Tab no longer includes options for disabling auditable events in the software such as User Log In/Log out/Session Time outs, PHI access, Medical Record sign off by Doctor or Technician, etc.

### **2015 PQR**

The Compulink-owned EHR screens delivered with this exe have been updated for the 2015 Physician Quality Reporting codes.

You must add, delete or update the corresponding PQR entries in your Services table, with identical POST codes, for PQR Codes to post from EHR to the patient ledger. [Click here](#) for a short recording. CMS is strongly recommending that all PQR codes be submitted with a charge amount of 1 penny (0.01).

- Go to the Medicare Fee Schedule(s) in your Services table and enter 0.01 in the CHARGE field for any new and all existing PQR Codes.

- If you also enter 999.99 in the ALLOWED amount, the penny will automatically adjust off during ledger posting, and your financial reports will not be inflated.

### **Advantage Master Users**

- Updates to previously delivered EHR tabs look at the HIDE attribute that is currently assigned to each tab.
- If you have the tab hidden and we update it, it remains hidden.
- You can unhide a tab at any time in the Screen Builder.

*Essentials Users* – your tab is always replaced with the latest tab when you update your program file.

### **Compulink University LMS and Retirement of the Legacy Training Site**

Due to recent updates performed by Cisco WebEx, the legacy training site we have been using to provide you with pre-recorded classes is no longer able to support the newer course formats. As a result, we have retired that site and will be solely using Compulink University LMS, our learning management system which was implemented last year.

To access CU LMS, your office must be running Advantage version 10.6 (or greater). This allows you to flag your Advantage users as students, by setting Learning Mgmt System to 'Y' in the Advantage Login IDs table. A student account is automatically created within approximately 45 minutes for that user on the [compulinkuniversity.com](http://compulinkuniversity.com) website.

The "LEARN" command on the Advantage main menu takes you directly to the Compulink University Student Portal. Browser login at <http://compulinkuniversity.com> is available for Advantage Cloud clients, and anyone who would like 24/7 access to our extensive library of on-demand recordings. Compulink University LMS offers all of the newest recordings, and allows for a much simpler registration process, reporting on your staff activity, and the ability to bulk register your team for courses all at once.

Just getting started?

[Click here for the Welcome to Compulink University LMS document](#)

[Click here for our Training Page with additional details](#)

### **COMPULINK TABLE UPDATES**

#### **General Table Updates**

Some tables have an 'Owner' column that identifies records as either 'U' for User or 'C' for Compulink. This allows us to pre-populate and update the tables with commonly used items so that you don't have to add them. Table updates are delivered automatically with our product exes, and never overwrite any entries that you add. For example, we periodically update the Owner 'C' records in the Diagnosis table. Any diagnoses you have added to the table are not touched. Owner 'C' table records cannot be deleted by the User, but you can hide them from display in your drop-down lists.

### Spectacle POS Pricing Table Updates

Clients running v10.6 and greater, who are current on support, may download Spectacle POS Table updates from the Advantage software. These are also delivered with Product Exe updates.

[Click here for a list of the latest updates.](#)

To download, go to UTILITY > LOOK-UP TABLES > SPECTACLE > COMPULINK TABLE UPDATE.

- There must be only one user logged into Advantage.
- Files are downloaded into the \Static and \Update folders in your Advantage product directory.
- The user must exit Advantage after download and re-start the software to force an update of those files.
- Follow the instructions to exit and restart the software, and click OK when prompted to complete the table update.
- Once the process is finished, you will see your normal Login window.
- New Compulink-owned table entries come into your system marked 'Hidden'. Be sure to un-check the Hide flag on any items that you want to use.

### Payors Updates

Clients running v10.6 and greater, who are current on support, may download Payors table updates directly from the Advantage software. These are also delivered with Product Exe updates. [Click here for a list of the latest updates.](#)

To download, go to UTILITY > LOOK-UP TABLES > FINANCIAL > PAYORS > COMPULINK UPDATE.

- There must be only one user logged into Advantage.
- Files are downloaded into the \Update folder in your Advantage product directory.
- The user must exit Advantage after download and re-start the software to force an update of those files. Once the process is finished, you will see your normal Login.
- New Payors come into your table 'Hidden'. Simply change the Hide flag to "N" to activate them.
- Your 'user-owned' carrier records stay active unless you choose to hide them.

### Scheduled File Updates

- Diagnostics:
  - o Compulink-owned Payors table and Claim Edit Payors, Claim Edits and Spectacle Table updates download every 28 days at the end of Diagnostics.
  - o Once the Diagnostic window closes, the files are extracted automatically.
  - o The user does not have to exit the software.
  - o The download takes place after auto-diagnostics as well.
- Using the look-up table's COMPULINK UPDATE command:
  - o Individual table updates are available via the COMPULINK UPDATE command located near the respective look-up table in the Utility menu.
- Configuration File:
  - o Your Advantage Configuration file is automatically downloaded approximately every 2 weeks.
  - o If there is a problem with the automatic download, a message will pop up for the first User who logs in for the day.
  - o This message will prompt them to notify their Administrator to download the Configuration file manually from the Utility > System Administrator menu. See the Help file for directions for the manual download.

- o *Related Courses on Compulink University LMS:*
  - *Program: Version 11 Enhancements*
  - *Course: PM\_245 Version 11.0.5.0*

## CUSTOMIZATION

### Screen Builder options for Essentials Clients:

- Essentials Clients may now access the Screen Builder utility to:
  - o Change the sort order of Tabs in a Layout.
  - o Create their own Layouts using Compulink-owned tabs.
  - o Hide screens.
- Only Advantage Master clients are able to design custom Tabs.

## DIRECT E-MAIL MESSAGES

Compulink's Advantage Version 11 integrates with Updox to provide Direct Addresses.

- Please see the WebHelp topic 'Get your Direct E-Mail for instructions'.
- Updox is a Health Information Service Provider (HISP) that operates the Updox Direct Network (UDN), the leading physician connectivity platform.
- Updox has complete DirectTrust.org/EHNAC HISP, RA and CA accreditations.
- DirectTrust is a non-profit health care industry alliance that has established and maintains rules, standards, and policies associated with the operation of the security and trust-in-identity layer for Direct exchange.
- Direct Messaging is required to satisfy ONC's 2014 Edition criteria for Meaningful Use Stage 2 including.
  - o 170.314(b)(2) - Transitions of care - create and transmit transition of care/referral summaries
  - o 170.314(b)(1) - Transitions of care - receive, display and incorporate transition of care/referral summaries
  - o 170.314(e)(1) - View, download, and transmit to 3rd party
- For providers not participating in Meaningful Use:
  - o You may receive Direct communications from providers who are participating.
  - o Hospitals will be using this protocol for test results.

This should in time become the standard for healthcare communication.

## EDI

### Batch Eligibility with Emdeon:

- Changes were made to improve readability of the Batch Eligibility Report.
- Payor Name and Emdeon Payor ID were also added.

### EDI PHI Security Enhancements:

- Due to HIPAA and Meaningful Use Stage 2 requirements, individual EDI files containing patient protected health information or PHI including electronic claims, remittance and eligibility files will no longer be saved in your Advantage product folder.

- You will need to run a one-time “Secure EDI Files” process to save important files and clean up your product folder by deleting files containing PHI.
- Going forward, EDI files will automatically be saved to a secure, encrypted table in your Advantage database.
- A new EDI Reports Viewer screen lets you browse new and historic files and reports, and will make your job easier! Otherwise, the changes to your daily process are MINIMAL.
- Details are available on the EDI Alerts page, in WebHelp and in the EDI Program in Compulink University LMS.
- *Related Courses on Compulink University LMS:*
  - o *Program: EDI*
  - o *Course: EDI\_220 EDI PHI Security Enhancements*
  - o *Course: EDI\_225 EDI Reports Viewer*

### **New Claim Edits and more in version 11 to improve billing**

View our recorded Webex training videos below. There are several options for accessing these recordings that include streaming, download, and MP4 if your computer/device supports this format.

[Download](#)

[Streaming](#) (11 minutes)

[MP4](#) (11 minutes)

### **Payor table content updates to improve organization**

- State-specific government payers like BC, BS, Medicaid and Medicare have been renamed starting with their full state name so they are now grouped together by State.
- Claim Edit Groups have been assigned to every Compulink-owned Payer to avoid or minimize rejections

### **New Form field default in Function>Activities>Insurance Billing**

- The default for the Form field is now CMS1500. Previously the default was HCFA1500 thru 10.6.
- If you are used to selecting CMS1500 in the Form drop down, that is no longer necessary.
- If you have NOT been making a change here and just going with the default of HCFA1500, please note you will now need to select HCFA1500 from the Form drop down or you will not get any patients to bill out when you run a claim batch.

### **New Remittance Features in v11**

[Click here to download New Remittance Features in v11](#) (PDF)

## **FUNCTIONS AND QUERY**

### **Payment Overdue Notices Indicator on the Patient Record:**

- When a patient has received 1 or more Overdue Notices, you will see the notation of 'Overdue Reminders Sent: #' in the Account Responsible section of their Patient Demographic screen.

## ICD-10

- *Related Courses on Compulink University LMS:*
  - o *Program: ICD-10*
  - o *Course ID: ICD\_10\_105 ICD-10 Introduction (available now)*
  - o *Course ID: ICD\_10\_115 ICD-10 Action Plan (available now)*
  - o *Course ID: ICD\_10\_120 ICD-10-CM Code Structure (available now)*
  - o *Course: ICD\_10\_125 ICD-10 Advantage Configuration*
  - o *Course: ICD\_10\_130 ICD-10 Software Utilization*

### **ICD Preference Flags have been removed:**

- The ICD-10 Preview options have been removed from the Status Bar Software Settings menu.
  - o When you right click on the status bar menu at the bottom of the screen, the “Diagnosis ICD Lookup Preference” and “EHR ICD-10 Simulation On/Off” no longer appear.
- Utility>System Administrator>Login>IDs.
  - o The “ICD-9 Lookup Preference” field has been removed from this table. The software will now automatically default to either ICD-9 or ICD-10 based upon the designated start date in the primary Payor record.

### **ICD-10 Start Date (Utility>System Administrator>System Setup).**

- An ICD-10 Start date field was added to the Miscellaneous tab.
- This field should be left blank. The software will assume a start date of 10/01/15.
- If CMS should change the start date, you may enter that new start date in this field.

### **ICD-10 Table Changes:**

- Insurance Payors (Utility>Look-up Tables>Financial>Payor Names)
  - o A new field called “ICD 10 START” was added to the table.
  - o For all Compulink-owned Payors, the ICD 10 START will be populated from the Emdeon Payer List based on the payer’s ICD-10 readiness.
  - o Run the Compulink Update command to stay current. (Utility>Look-up Tables>Financial>Payors>Compulink Update)
  - o For all User-owned Payors, the ICD 10 START date defaults to 10/1/15 on new entries, and is assumed to be 10/1/15 on existing entries.
  - o If you have a Payor that will not be ready to accept claims on that date, you may enter that individual Payor’s Start date.
  - o More guidance will be available on this as we get closer to the ICD-10 effective date.
- Assessment/Plan>By Diagnosis (Utility>Look-up Tables>EHR>Assessment/Plan>By Diagnosis).
  - o Added ICD-10 codes to the table.
- Diagnosis Name (Utility>Look-up Tables>EHR>Diagnosis>Name).
  - o The complete set of ICD-10 codes was appended to the table.
- Encounter Favorites (Utility>Look-up Tables>EHR>Encounter Favorites).
  - o A new “ICD-10 Diagnosis List” field was added.
  - o This list contains the “base” ICD-10 codes that will be used after the ICD-10 Start Date.
  - o When selecting an Encounter Favorite in the exam, the software will use the Start Date to determine if it should pull from the “ICD-9 Diagnosis List” or the “ICD-10 Diagnosis List.”
- Bitmap Detail (Utility>Look-up Tables>EHR>Image>Bitmap Detail).



- o A new “ICD-10 Code(s)” field was added.
- o This list contains the “base” ICD-10 codes that will be used after the ICD-10 Start Date.
- o When selecting a Bitmap in the Visual Documentation Engine, the software will use the Start Date to determine if it should pull from the “ICD-9 Code(s)” or the “ICD-10 Code(s).”
- Base Image (Utility>Look-up Tables>EHR>Image>Base Image).
  - o Some base images have Regions attached to them.
  - o Highlight a base image and click on Regions at the top.
  - o This will open a window with the image in the middle with all of the regions outlined, and the list of regions listed on the left.
  - o Double click on one of the regions on the left and the Area Edit window opens.
  - o The “ICD Keywords” field is where you can enter any keywords that you would like the software to look for when selecting the list of diagnosis codes to choose from when using the Visual Documentation Engine.
  - o The software will first look at the ICD-10 codes that are assigned in the Bitmap Image Detail table. These could be a list of 3 character “base” codes.
  - o From that list of diagnoses listed, it will then look to the “ICD Keywords” field for words that could help to narrow down that list of diagnoses to choose from.
  - o If the “ICD Keywords” field is empty, it will then look to the Region Name for words that could help to narrow down that list of diagnoses to choose from.
  - o When dropping a bitmap on the VDE, the ICD-10 list will be filtered down based on the keywords in the region you dropped it on.
- HCM Order Sets (Utility>Health Care Maintenance Rules>Diagnosis/Orderset Mapping).
  - o Added ICD-10 codes to the table.

### ICD-10 and Patient Exam:

- Exam date. The ICD-9/ICD-10 toggle is controlled by the Exam date.
  - o If the exam date is BEFORE the ICD-10 Start Date, ICD-9 codes will be used throughout the exam.
  - o If the exam date is ON or AFTER the ICD-10 Start Date, ICD-10 codes will be used throughout the exam.
  - o If the ICD-10 Start Date for the patient's Primary Payor is anything other than the 10/01/15 date, it will use that date to determine if it should use ICD-9 or ICD-10.
- Complaint
  - o There is a new accident button and memo field inside the Chief Complaint popup.
  - o Fill out the “Additional/Accident Details” field and click the button.
  - o It will automatically add a diagnosis record, and copy the details to the Assessment field.
  - o Once you complete the exam and arrive on the Plan tab, you will need to edit the existing diagnosis record that was added, and complete the rest of the information.
- Diagnosis Assessment/Plan grid.
  - o Diagnosis name field: When entering diagnoses manually, “Unspecified” options will not be displayed. CMS suggests that each healthcare encounter should be coded to the level of certainty known for that encounter.
- Assessment and Plans.
  - o Double click in the Assessment or Plan field and they will only display items based upon the ICD-9/ICD-10 toggle.
- Forwarding the Diagnosis.



- o The “Forward Last DOS” icon (blue circle arrow) will now display on the Diagnosis grid.
- o Forwarding from ICD-9 to ICD-10.
  - If the exam date is ON or AFTER the ICD-10 Start Date, diagnoses will forward from ICD-9 to ICD-10.
  - If the ICD-10 Start Date for the patient's Primary Payor is anything other than the 10/01/15 date, it will use that date to determine if it should forward ICD-9 or ICD-10.
  - Single diagnosis.
    - Highlight an ICD-9 code from an exam date prior to the switch to ICD-10, click on the green circle arrow to forward. This will bring up a window for you to select the appropriate ICD-10 code.
- o All diagnoses from the previous exam.
  - Click on the blue circle arrow to forward ALL of the ICD-9 codes from the previous exam to ICD-10 codes on the current exam. This will bring up a window for you to select the appropriate ICD-10 code.
  - Combination codes.
    - If 2 or more of the ICD-9 codes can be combined into 1 ICD-10 code, this will be done when using the “Forward Last DOS” icon.
    - Example: ICD-9 = 250.50, 362.05 and 362.07; when forwarded with blue arrow (after 10/1/2015) will come through with one ICD-10 = E11.331.
- o If only one ICD-10 code matches the ICD-9 code that is being forwarded, the diagnosis selection window will be bypassed, and the new code will automatically forward.
  - Example: ICD-9 = 362.52; when forwarded ICD-10 = H35.32.
- o If a “Side” or “Eye” was defined in the previous ICD-9 code, that will be used as a filter for the ICD-10 diagnoses that are available.
- Forwarding from ICD-10 to ICD-9.
  - o On the previous exam, ICD-10 codes were entered for the patient.
  - o Upon the next visit, the patient's Primary Payor has changed, and the ICD-10 Start Date for that Payor has not arrived yet.
  - o This means that the codes for this date of service must be in ICD-9, or the Payor will not accept the claim.
  - o When manually entering a diagnosis code, or using the Encounter Favorites and Visual Documentation Engine (VDE), the software will see the Payor Start date, and use the ICD-9 codes.
  - o When forwarding a previous diagnosis, the forward last date of service option is disabled, and you must forward one at a time.
    - If you click the icon, you will receive a message: Unable to forward ICD-10 codes back to ICD-9 as a GROUP. Please use Individual Forwarding Option!
  - o A diagnosis selection window will open for you to select the appropriate diagnosis if there is more than one code that matches.
  - o If only one ICD-9 code matches the ICD-10 code that is being forwarded, the diagnosis selection window will still come up, but the code is automatically selected/checked in the window. Hit Enter or click OK to forward the ICD-9 and bring up the diagnosis editing window.
    - Example: ICD-10 = H35.32; when forwarded ICD-9 = 362.52.
- Encounter Favorites:
  - o Items used to filter the diagnoses list.

- The software uses the name of the Encounter Favorite as keywords to search for the closest diagnoses (left/right/OD/OS/OU). If RT or LT was used in the name, it will be recognized as right or left in the search.
- The software will pull either ICD-9 or ICD-10 diagnoses based upon the exam date or the ICD-10 Start date on the patient's Primary Payor.
- Visual Documentation Engine (VDE).
  - If the exam date is ON or AFTER the ICD-10 Start Date, diagnoses attached to bitmap images will default to ICD-10.
  - If the ICD-10 Start Date for the patient's Primary Payor is anything other than the ICD-10 Start Date, it will use that date to determine if it should default to ICD-9 or ICD-10.
- Smart Functions
  - Automatically adding a diagnosis.
    - If you have a smart function attached to a button that will automatically add a diagnosis record, the software will automatically prompt you to select which ICD-10 diagnosis you would like to add. It is converting the ICD-9 code that is built into the smart function, to a list of ICD-10 codes to select from.
    - You will also be reminded once daily that you also have the option of using Encounter Favorites and the Visual Documentation Engine for higher efficiency.
- Fees command.
  - Added Auto-creation of PFSH ICD-10 ExamDiag records as needed, based upon the ICD10PFSH table.
  - This table indicates what History related ICD-10 records should be added if the Exam Health History contains Significant positive indication of a disorder already recorded.
  - This will take place automatically when clicking on the Fees command.
  - Example: Make sure the client is a smoker indicated in the Health History, and add this diagnosis in ICD10 mode: H35.32. Click the Fees command. An additional diagnosis of Z72.0 Tobacco use will appear.
  - When clicking on Fees, these historical codes will always be listed at the bottom of the diagnosis order, so they will NEVER default onto the charges.

## ICD-10 and Patient Ledger

- Adding a Diagnosis:
  - In the patient ledger, the ICD-10 functionality is controlled by the From date or date of service.
  - If the date of service (ledger from date) is BEFORE the ICD-10 Start Date, the diagnosis dropdown will only display ICD-9 codes.
  - If the date of service is ON or AFTER the ICD-10 Start Date, the dropdown will only display ICD-10 codes.
- Claim Sets.
  - ICD-9 codes and ICD-10 codes can NOT be billed on the same claim set.
- Claim screen.
  - When adding a diagnosis on the expanded claim screen, the drop-down will display ICD-9 or ICD-10 based upon the date of service (ledger From date) on the ledger.

## ICD-10 and Functions

- Function>Insurance Activities>Billing.

- o ICD-9 and ICD-10 codes can NOT be billed on the same claim.
  - If the current date is after the ICD-10 start date, the claim validation will look for ICD-9 and ICD-10 codes that are on the same claim set, and will produce an error on the Claim Edit Error Report.
  - This claim validation will also take place on the patient ledger when clicking the “Claim Validate” button or when printing an individual claim.
- o ICD Indicator.
  - When sending paper claims in a batch, or printing from the ledger, the software will look at the diagnosis codes on the claim set to determine the ICD Indicator in box 21.
  - If the claim set has ICD-9 codes, it will populate the field with a 9.
  - If the claim set has ICD-10 codes, it will populate the field with a 0.

## LEDGER

### Merchant Interface for Credit Card Transactions

- XCharge by OpenEdge is a cost-effective, secure and reliable gateway for processing credit card transactions.
- Clients using Advantage Version 10.6 and greater have access to the Advantage/XCharge interface.



### Rx Discounts Pharmacy Discount Program

- Rx Discounts is a prescription discount program administered by MedImpact, the 4th largest pharmacy benefit manager in the United States.
- The Rx Discounts pharmacy network includes 62,000 pharmacies nationwide, including the big box retailers, every national drug store chain, and thousands of independent pharmacies.
- Rx Discounts runs the pharmacy loyalty programs for 1 out of 3 pharmacies in the country. This includes CVS, Rite Aid, Target and Kroger.
- Rx Discounts has unique programs for Medicare Part D and contracts with the major payors, such as Humana and United HealthCare 10.
- Providing this benefit to your patients is as easy as printing a receipt.

**RECEIPT**

|                                                                                                                                                                    |                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| <b>From Location:</b><br>3245 Tanager Rd. Ste. 200<br>Fremont Village, CA 91921<br>Phone: (602) 488-8275<br>Fax: (602) 487-4893<br>Customer@compulinkadvantage.com | <b>To: You (patient):</b><br>1033 Thousand Oaks Rd<br>Fremont Village, CA 91921<br>Account #: 10<br>Patient#: 40144444, T10 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|

  

| DATE                                                   | DOB      | PATIENT | ACTIVITY        | ID  | UNITS | AMOUNT           | ADJUST          | CREDIT                   |
|--------------------------------------------------------|----------|---------|-----------------|-----|-------|------------------|-----------------|--------------------------|
| 05/23/14                                               | 05/23/14 | Ten     | Office Visit    | DRD | 1.0   | \$80.00          | \$-10.00        |                          |
| 05/23/14                                               | 05/23/14 | Ten     | Initial Consult | DRD | 1.0   | \$80.00          | \$-10.00        |                          |
| 05/23/14                                               |          |         | Ref - Cash      |     |       | \$0.00           | \$0.00          | \$110.00                 |
| <b>Grand Totals for the period beginning 1/1/2014:</b> |          |         |                 |     |       | <b>\$ 160.00</b> | <b>\$ 10.00</b> | <b>\$ 150.00</b>         |
| <b>Total Revised Balance:</b>                          |          |         |                 |     |       |                  | <b>\$</b>       | <b>0.00</b>              |
| <b>Responsibility Balance:</b>                         |          |         |                 |     |       | <b>\$</b>        | <b>0.00</b>     | <b>Previous Balance:</b> |
| <b>Account Expected from Insurance:</b>                |          |         |                 |     |       | <b>\$</b>        | <b>0.00</b>     | <b>Account Balance:</b>  |
|                                                        |          |         |                 |     |       | <b>\$</b>        | <b>0.00</b>     | <b>\$ 0.00</b>           |

  

**FUTURE APPOINTMENTS**

| DATE     | TIME     | DAY     | LOC | DEPT | ID | PROVIDER          | REASON    | STATUS |
|----------|----------|---------|-----|------|----|-------------------|-----------|--------|
| 05/23/14 | 10:45 am | Tuesday | 200 | MBU  |    | Arnold, Matthew M | Follow-up | B      |

  

**COMPULINK ADVANTAGE CARD**

**FROM LOCATION:**  
 3245 Tanager Rd. Ste. 200  
 Fremont Village, CA 91921  
 Phone: (602) 488-8275  
 Fax: (602) 487-4893  
 Customer@compulinkadvantage.com

**ACCEPTED AT OVER 80,000 PHARMACIES. SCAN NOW FOR A PARTICIPANT CARD.**

**Medical Institutions:**  
 1. Take this card to participating pharmacies.  
 2. Use it to pay for your prescriptions.  
 3. Pay the discounted price for your prescriptions.

**Pharmaceutical Institutions:**  
 This card is pre-validated. The RABID, RUPOL, RUPOLP and RUPOLP-CD must be identified to the pharmacist to receive this card.  
 For more information or to request additional cards, please contact us at 1-877-488-8275. To locate participating pharmacies or look up drug prices, please visit our website: [www.compulinkadvantage.com](http://www.compulinkadvantage.com)

**Pharmacy Use Only:**  
 This card is pre-validated. The RABID, RUPOL, RUPOLP and RUPOLP-CD must be identified to the pharmacist to receive this card.  
 For more information or to request additional cards, please contact us at 1-877-488-8275.

## MEANINGFUL USE

### 2014 Meaningful Use Certified

- Version 11 is CCHIT Certified for Eligible Professionals who are reporting for Stage 1 or Stage 2.
- In the Version 11 WebHelp, you will find a Meaningful Use section with topics for each individual Core and Menu Objective by Stage, in addition to the 2014 Clinical Quality Measures.
- New to Meaningful Use reporting? <http://www.cms.gov/EHRIncentivePrograms/> is the official website landing page for CMS's Medicare and Medicaid Incentive programs.

### Data Mining > Reminder option

- Some clients send reminders for preventative care using the Data Mining/SQL Query tool.
- If the Reminder option is checked and you have selected an Output of 'Letter', the patients included in the operation are counted in the Numerator.
- This records a PHI Audit Event '65 – MU Additional Communication' that is evaluated by Meaningful Use reporting for Stage 1 Menu 4 Patient Reminders and Stage 2 Core 12 Reminders for Preventative/Follow Up Care.
- *Eligible Providers who use this option to send Reminders for Preventative/Follow-Up Care acknowledge that they understand the functionality and are responsible for its correct use in the event of a Meaningful Use audit.*
- *Related Courses on Compulink University LMS:*
  - o Program: Meaningful Use
  - o Course: MU\_416b Meaningful Use Stage 1: Menu 4 Patient Reminders
  - o Course: MU\_511b Meaningful Use Stage 2: Core 12 Patient Reminders

### Patient Opt Out Portal:

- A check-mark in this new field indicates that the patient does not want to be sent communications from their provider to the Patient Portal at mysecurehealthdata.com.
- Per CMS, patients who Opt Out are counted in the Numerator for reporting the following MU Objectives: Stage 1 Core 11 Patient Electronic Access, Stage 1 Core 12 Clinical Summaries, Stage 2 Core 7 View Download Transmit, Stage 2 Core 8 Clinical Summaries.
- *Related Courses on Compulink University LMS:*
  - o *Program: Meaningful Use*
  - o *Course: MU\_410b Meaningful Use Stage 1: Core 11 Patient Electronic Access*
  - o *Course: MU\_411b Meaningful Use Stage 1: Core 12 Clinical Summaries*
  - o *Course: MU\_506b Meaningful Use Stage 2: Core 7 Patient Online Access*
  - o *Course: MU\_507b Meaningful Use Stage 2: Core 8 Clinical Summaries*

### Portal Communication Function

- You may restrict access to this function with the new 'CCD Function' Login Profile Right, located under the System Administrator > Login > Profiles utility.

### SQL Work List for Pending CCD Messages

- The Work List 'Unsent CCDs Ready to Send' displays the list of patients with pending CCDs that can be reviewed before running the Portal Communication function.
- There may be situations where the provider does not want to automatically deliver the patient's exam summary to the Portal. Perhaps you need to contact the referring physician prior to release.
- Enter a CCD Hold date on the Plan tab of this patient's medical record and no Continuity of Care Document will be released to the Portal until after that date.

### Understanding Meaningful Use Reporting Periods

Centers for Medicare and Medicaid Services offers an easy tool to determine which year you will demonstrate Stage 1, Stage 2 and Stage 3 of Meaningful Use. Find the length of time you are required to demonstrate meaningful use at each stage, and the maximum incentive payment for each year you participate.

1. [Click here for the 'My EHR Participation Timeline' on the CMS.gov website.](#)
2. Click START.
3. Select the incentive program you are participating in (Medicare or Medicaid).
4. Select your first year of participation from the drop-down list.
5. You are presented with a yearly timeline.
6. Click on a year to see which Stage's criteria you need to report on, as well as the required reporting period (any 90 days, 3 months on a quarterly basis, full year).

### Utility>System Administrator>System Setup

- On the Miscellaneous tab, a new "MU Reminder Threshold" field was added.
- The default MU Reminder Threshold is '0', indicating that all Appointment Communications are for care the patient is scheduled to receive.
  - A MU Threshold of 90 days tells the software that patients sent a communication for an appointment more than 90 days from today, are getting a reminder for preventative care.

- When running the Appointment Communication function, it will record a PHI Audit Event '66 – MU Appointment Communication' that is evaluated by Meaningful Use reporting for Stage 2 Core 12 Reminders for Preventative/Follow Up Care.
- *Eligible Providers who use this option to send Reminders for Preventative/Follow-Up Care acknowledge that they understand the functionality and are responsible for its correct use in the event of a Meaningful Use audit.*
- *Related Courses on Compulink University LMS:*
  - o *Program: Meaningful Use*
  - o *Course: MU\_511b Meaningful Use Stage 2: Core 12 Patient Reminders*

## MEDICAL RECORDS

### Adaptive Learning Functionality

- There is Usage Prioritization when you enter the Exam Diagnosis on the Plan tab.
- This functionality keeps track of all Diagnosis table entries selected by the current User.
- When clicking the drop down for Diagnosis Code or Description, the software first displays the top 10 table entries previously chosen by the user who is currently logged in, followed by the rest of the entries in the Diagnosis table.

### Continuity of Care Documents:

- The patient's Social Security Number will no longer be used as the Patient ID on the CCDA documents.
- The Location's NPI number, plus the patient unique number will now be used.
- If the NPI number is not available, it will use the last 4 digits of the patient's Social, plus the patient unique number.
- If the Social is not available, the section will be marked as unknown (UNK).
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*

### Diagnosis Assessment/Plan grid:

- Diagnosis Name field
  - o This field was expanded to accommodate a multiple keyword search. Type in more than one word, hit the down arrow, and the list will be filtered by the matching keywords.
  - o This keyword search used to look in the "Short Description" field in the diagnosis table, but will now look in the "Long Description" field. This will increase the number of keywords that can be matched.
  - o It will search each word individually and find the best results. For example if you type 'eye right cyst' it will find the codes that match the 3 words regardless of order.
- Forwarding the Diagnosis.
  - o The "Forward Last DOS" icon (blue circle arrow) will now display on the Diagnosis grid.
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*

### Encounter Favorites:

- If a Login ID was assigned to the Encounter Favorite, it will display after the name (E.F. name – ID)
- Check boxes to select items.
  - o After choosing an Encounter Favorite, the Select Diagnosis window opens and there are now check boxes to allow you to select multiple diagnoses.
- The directions at the bottom of the window were updated.
- Items used to filter the diagnoses list.
  - o The software uses the name of the Encounter Favorite as keywords to search for the closest diagnoses (left/right).
  - o If RT or LT was used in the name, it will be recognized as right or left in the search.
- The name of the Encounter Favorite that was selected will display at the top of the Diagnosis Selection window.
- Appending or replacing data manually entered.
  - o If a data field already contains data, the information pulled in using the Encounter Favorite will append to the end of that existing data, and not replace it.
  - o If the data field contains the “Default or Normal” value, then that value will be replaced by the data from the Encounter Favorite.
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*

#### **New Default option:**

- By creating ‘DEFAULT’ encounter favorites, you can auto populate Tabs upon first access to the tab by a provider.
- An Encounter favorite must exist with the name ‘DEFAULT’ for each particular tab. These can be configured for All providers or specific IDs.
- The software looks for the DEFAULT specific to the logged in provider first. If no matching entry exists, the software will use the general/non provider-specific DEFAULT Encounter Favorite.
- There is a Compulink-owned Default Encounter Favorite delivered as part of the Version 11 update.
- To disable this from populating data fields automatically as you add new medical records, go to UTILITY > LOOK-UP TABLES > EHR > ENCOUNTER FAVORITES.
- Use SEARCH to locate the ‘Default’ record, edit and change the Hide field to ‘Y’, and then Save.

#### **Smart Functions:**

- Encounter Favorite button (purple star).
  - o If the exam is NOT in edit mode and you click the Encounter Favorite button (purple star), it will automatically put the exam in edit mode and bring up the list of Encounter Favorites to select from.
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*

#### **General Changes for less screen clutter**



- Vertical scroll bars are no longer displayed in grids, unless there is sufficient text in the field to require scrolling.
- Custom numeric fields that have never been touched will display no digits. Manual entry of 0., 0.0, or 0.00 will force display of the zero value.
- Patient Menu items are only displayed if the User has access rights to that area of the software.
- If, for example, a user does not have access rights to Appointments or Ledger, those icons will not appear in the menu when they are logged in.



- **Save/Add** The new Save/Add icon may be used to Save and go immediately into Add of another record in a PopUp EHR Add window, such as the Diagnosis grid in the Plan tab. This saves time when adding multiple records.



- This new Search icon may be used to find Text within the medical record.
- Click on the icon and choose 'Text Within Record'.
  - A window opens with a prompt to Enter Text for Search. Enter a word, sentence fragment, etc., then click OK, or hit Enter.
  - The exam record is converted to document format, based on document name that is assigned to this Layout in the 'Complete Doc' field Screen Builder.
  - If a match is found, the document is displayed with your search text highlighted in yellow.

## Images

- Effective with Version 11.0.4.6 and greater, if there is a problem with the image imported or scanned into the medical record, the tab will open instead of returning an error, with a placeholder in the image box displaying the notation 'bad image'.

## Video Files:

- You are now able to import the following types of video files into image fields in the patient exam: WMV, Mpeg, MP4, and MOV.
- *Related Courses on Compulink University LMS:*
  - o Program: Version 11 Enhancements
  - o Course: PM\_245 Version 11.0.5.0 Changes

## Medications:

- Prescription: Effective with Version 11.0.4.6 and greater, prescriptions printed for the states of Missouri and Washington have been updated to meet state requirements.

## Medline Plus the National Institutes of Health's website of information about diseases, conditions, and more in easy to understand language.

- The Compulink-owned medical record screens are configured for quick access to the Medline Plus database.
-  The Info icon can be found on the exam screen grids for Diagnosis, Medications and Tests.

- This is a quick way to provide educational resources to your patients, and build your library of resources for future use.

### **Right Click Options**

- When you right click on a data field with a look-up table, the 'View Lookup List Entries' command opens the table enabling the user to add new items and assign them a display order.
  - Effective with Version 11.0.4.6 and greater, this option is available in many fields with multi-column tables, such as Diagnosis and Test Name.
  - Replaces the previous option to 'View Lookup Table Name' that displayed the table name but did not allow editing.
  - This is different from the Add to Lookup List option that adds what you have typed in the field to the table without a display order.

### **Sign Off**

- EHR Pop-Up Messages at Sign-Off:
  - Encounter Favorites and the Visual Documentation Engine are both great time savers for documentation.
    - o If the Provider hasn't used these efficiency tools in the last month, a reminder appears at Sign-Off.
  - Meaningful Use Stage 2 requires that the Provider has a Direct E-Mail address.
    - o If the Provider signing off is configured for MU Stage '2' and Stimulus Assistance 'Y' in the Provider table but has no Direct E-Mail address, they will receive a reminder message.

## **OPTICAL AND INVENTORY**

### **Inventory:**

- Frame Style and Contact Lens Name have been expanded to 30 characters.

### **Spectacle and CL Rx Order Tabs:**

- Frame Style and Contact Len Name have been expanded to 30 characters.

### **Spectacle and CL Lab Info Tabs:**

- Order Number and Invoice Number fields have been expanded to 20 characters.
- There is a new 'Notified By' field. Click the 'Notify' command to auto-populate this field with the full name of the user currently logged in.

### **Spectacle POS Look-Up Tables:**

- Lens Definitions: Effective with Version 11.0.4.6 and greater, users can Add or Delete lens components listed as Detail records on Compulink-owned lens definition records.

## **PATIENT RECORDS**

**Patient and Exam screen menu items are only displayed if the active user has access rights to these items**

- For example, if the user who is logged in does not have access rights to Appointments or Ledgers, those icons will not appear in the menu.

### **The Demographic Screen has been redesigned with less clutter**

- Patient, Account Responsible, Contact information and Appointment History are consolidated in a single screen tab.
- Only information that you need to see on a consistent basis is displayed, unless you are in Add or Edit mode.
- Italicized labels identify the data elements associated with Meaningful Use documentation and reporting.
- The Account Responsible section of the Compulink-owned Patient screen now has DOB and Sex fields. When adding an insurance record, choosing 'Account Responsible' as the Insured party will populate the insured's Birth and Gender fields required for claims.
- Active Field: This patient field may be unchecked when the patient record is inactive and being maintained for historical information. Inactive patients are ignored by the Recall function. Adding new Exam and Rx records is prohibited when the patient is inactive.

### **Create Family Accounts with Separate or Shared Ledgers**

- There are now two Add > Family options available.
- In both cases, the new patient is assigned the Location, Last Name, Address, Home Phone and Account Responsible information from the account where they are added.
- With Family (Separate Ledger), each patient has a separate Account Number and an individual Ledger.
- With Family (Shared Ledger), the new patient is added to the displayed patient's account and shares their Ledger.

### **Deleting Patient Records**

- Deleted Patient Information is recorded in the PHI Audit Event Log.
- To view the patient information, go to Report > System Admin. > PHI Audit Event Log.
- Look for the Category 'PHI Deleted Information'. The log will display a record for each data element deleted.
- You may not delete a patient who has existing Medical Records.
- The message 'You may not delete a patient who has existing Medical Records!' will appear if you attempt to do so.
- 'You must manually Delete those first!' will appear if you attempt to do so.
- This requires the User to first go through the EHR Delete process, which ensures all necessary auditing of deleted EHR records takes place.

### **E-Mail:**

- You can now send a non-PHI E-Mail Message directly from the Patient screen with PRINT > E-MAIL TO PATIENT.

**Gender Default Has Been Removed:**

- In response to client requests, the patient Sex field no longer defaults to 'F' when adding new patients.

**Insurance Card Scanner:**

- Effective with Version 11.0.4.6 and greater, if there is a problem with the card image scanned, the insurance record will open instead of returning an error, with the notation 'bad image' in the image box.

**Meaningful Use Reminder for missing Demographic Data**

- The message 'Missing Stimulus Information' is highlighted in yellow at the top of the patient screen if any of the following fields are not populated: Sex, Race, Ethnicity, Date of Birth, Preferred Language.

**New Tabs**

- The Address History Tab may be used to store the patient's previous residences, Occupation and Industry.
- The Interest Tab is used to identify and monitor a patient's interest in the goods and services you provide.

**Opt Out Portal:**

- A check-mark in this new field indicates that the patient does not want to be sent communications from their provider to the Patient Portal at mysecurehealthdata.com.
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*
  - o *Program: Meaningful Use*
  - o *Course: MU\_410b Meaningful Use Stage 1: Core 11 Patient Electronic Access*
  - o *Course: MU\_411b Meaningful Use Stage 1: Core 12 Clinical Summaries*
  - o *Course: MU\_506b Meaningful Use Stage 2: Core 7 Patient Online Access*
  - o *Course: MU\_507b Meaningful Use Stage 2: Core 8 Clinical Summaries*

**Opt Out Reminders:**

- A check-mark in this new field indicates that the patient wants to be excluded from Appointment Communications and Patient Recall reminders.
- These functions will bypass the patient, even if they have an appointment scheduled or recall pending.
- *Related Courses on Compulink University LMS:*
  - o *Program: Version 11 Enhancements*
  - o *Course: PM\_245 Version 11.0.5.0 Changes*

**Patient Tracking > Goto command**

- Highlight a patient name in the Tracking window and choose 'Goto' to move to their patient record.
- The Tracking window remains open and the selected patient record is displayed behind it.
- *Related Courses on Compulink University LMS:*
  - o Program: Version 11 Enhancements
  - o Course: PM\_245 Version 11.0.5.0 Changes

### **Print > Audit Report**

- This command replaces the Patient History > Communication and Access commands.
- The report generated includes Views, Queries, Changes to Data and Communication outputs from the patient's record.

### **Text Messaging**

- Use PRINT > TEXT MESSAGE from the Demographic screen to send a text message to the cell phone number in the patient's record.
- This command lets you easily send a text up to 80 characters to your patient.
- The 'From' address in the message is the e-mail assigned to the patient's Location in the Location Details table.
- There are 60 major cell phone carriers recognized and the software will add other carriers automatically, based on the cell phone number.

## **REPORTS**

### **Beta Reports (new to Version 11.0.4.6)**

- We are excited to offer BETA Reports for Compuink Advantage and are soliciting your detailed feedback to improve your reporting experience.
  - o You'll find them on the Report menus, low on the menu list, with a title starting with "~BETA".
  - o Example: Report > Financial > Analysis > ~BETA Office Production w Inline Adjustments.
- To provide feedback, please follow these simple instructions:
  - o Run the report.
  - o If you see an issue or have a suggestion, contact us by E-MAIL at [betareportfeedback@compulinkadvantage.com](mailto:betareportfeedback@compulinkadvantage.com).
  - o In the subject line include "BETA Report Feedback"
  - o Your e-mail should include the report Name and Pre-Release Version from page 1 of the report.
- TELL US:
  - o Something you really like in the report: Be sure to tell us what you LIKE!
  - o Issue or Problem: Make a detailed description of the issue or screen shot.
  - o Suggestion: Describe it and how it would improve the usefulness of report.

### **Updates:**

- Charge Collection Analysis:
  - o Percent of net charge paid by payment source was added to the bottom of the report. (Report > Financial > Analysis)
- Production Analysis by Charge. (Report > Financial > Analysis)

- o Charge Detail now includes Refund information.
- o Summary by Charge now includes a "NET CRED" (Net Credits) column.

**New:**

- PQR Compliance 2015 report is now available. (Report > Financial > Acct Management)

## TABLE ENHANCEMENTS

### Inventory Sales Tax by LOC/Category

- The new 'Tax on Retail Charge instead of Retail Adjustment' field is available for practices who need to tax the retail amount instead of the adjusted amount in Spectacle Rx pricing. (Utility > Look-up Tables > Inventory)

### Location Details Table

- The following fields were increased in size: Name (60 char), Street (55 char), City (30 char), Zip (15) and Letterhead 1-6 (80 char).

#### Country Field

- A new field has been added to indicate the Country that the office is located in.
- This is required for HIPAA 5010 compliance. It is also used for CCD Documents, Cancer Registry files, and HL-7 Interfaces.

#### Direct E-Mail field:

- This new field was added for transport of electronically secure messages.
- This is your office's Direct E-Mail address for incoming CCD documents and other PHI. It is not the same as standard e-mail.
- Direct-E-Mail is used by several Meaningful Use objectives related to electronic exchange of patient information with other providers and registries.

### Provider Table

- A new Suffix field was added.
- MI was changed to Middle Name and expanded to 25 characters.
- The following fields were increased in size: Last (60 char), First (35 char), Degree (10 char) and Salutation (10 char).

#### Meaningful Use Stage field:

- This new field was added to indicate '1' for Stage 1 or '2' for Stage 2.
- This is used for generating Meaningful Use report data for Measures associated with the specified Stage.
- When populating data for Meaningful Use, the software will be checking the provider selected as to what stage they are on.
- The software will then look at Meaningful Use measures for that stage.

#### Direct E-Mail field:

- This new field was added for transport of electronically secure messages.

- This is not the same as standard e-mail. Instead, it is this Provider's incoming E- Mail address used for secure transmission of patient information, such as CCD Documents.
- Direct E-Mail is required for Meaningful Use Stage 2 measures. Often related to transitions of care in and out of the practice.

#### **Referral Sources**

- MI was changed to Middle and expanded to 25 characters.
- The following fields were increased in size: Salutation (10 char), First (35 char), Last(60 char) and Degree (10 char).

##### **Direct E-Mail field:**

- Direct E-Mail is used to transport electronically secure messages.
- This is not the same as standard e-mail. Instead, it is the Referral Source's outgoing E-Mail address, use when selecting this menu option in medical records: M.U. > Send CCD To Referral via Direct E-Mail.

#### **Post Code fields in Compulink-owned Table Entries**

- Users may now access the Post Code field in the EHR Surgery Names, Test Names, and Treatment Names tables to use their own Service table Post Codes.

#### **On-Demand Table Updates (Claim Edits, Payors, etc.):**

- Effective with Version 11.0.4.6, once you select COMPULINK UPDATE, you will be asked to 'Press Yes to confirm your desire to download the tables'.
- If you have accessed the Update option in error, you can now select 'No' to cancel the operation.