

MOS 05.00.00 Upgrade Notes- ANSI install

May 18, 2006

Fixes and additions made to this release of the VSS Medical Office System (VSS MOS).

MOS CHANGES

Many users have installed the 04.0.02 upgrade that provided a number of these options, fixes and upgrades. Those have been included in this listing.

We have added a few reports:

- (529) - Inactive Patients List - List of patients that have not been seen since a date
- (53E) - Location Mailing Labels - labels for the Location of Services
- (53G) - Missed Appointment List - List of patients that missed appointments
- (56L) - Pending Invoice List - List of invoices marked pending - New category for holding invoices for additional information.
- (56K) - Service Date Detail - List charges /Payments/Write-offs by date of transaction
- (51L) - Procedures by Carrier
- (52L) - Patient Tests List - List of tests ordered for patients
- (53H) - Count Patient/Claims by Provider - between dates
- (54C) - Count Patient/Claims by Carrier - between dates
- (549) - Count Patients by Carrier - All patients
- (56N) - Hospital Admits Report
- (56M) - Electronic Submission Report - List submissions for electronic filing
- (552E) - Entity Summary
- (53I) - Patients by Location - Number of patients seen at a location
- (56P) - Current Hospital Patients - Patients currently admitted to a facility
- (53J) - Very Short Daily Office Schedule - Same as Short Schedule but all extra white space is removed.

MEDICAL OFFICE SYSTEM - UPGRADE LOG 05.00.00

These changes, corrections and additions have been made to the Medical Office System since the May 2003 update sent. If your support contract is currently in effect, these will be shipped at no charge. We will be sending the corrected manual pages and new documentation as soon as it is ready.

Electronic Filing Changes

Full addition of NPI numbers for all providers, facilities has been incorporated. This is the major change for the FastEMC upgrade in addition to any fixes that have been required along the way.

MEDICAL OFFICE SYSTEM - UPGRADE LOG 05.00.00

These changes, corrections and additions have been made to the Medical Office System since the May 2003 update sent. If your support contract is currently in effect, these will be shipped at no charge. You will be able to download the update for Windows Platforms or order the installation CD.

- 7/14/03 - Fixed prompt for popup screen on scroll lines to correctly work.
- 4/4/03 - Age on Patient Screen was incorrect - Fixed
- 3/17/03 - Added a sort question to Change MC Allowance to allow a sort by Provider/CPT instead of YOUR codes.
- 7/24/03 - Add ALL choice to Electronic Posting question for applying a changed POS to the service lines. This will cause the ALL answer to act as if you pressed Y for each claim. It will help the process run without the stops.
- 8/11/03 - Make sure TO Date on service line is always the same as From Date when the From Date is not displayed for data entry.
- 8/8/03 - Add Referring DR selection to the Procedure Payment Report.

- 8/8/03 - Add selection for PAID IN FULL or all Charges on Procedure Payment Report.
- 8/8/03 - Changed Procedure Payment Report on Financial Menu to be a Summary version with one line per procedure.
- 8/12/03 - Add <PTPAY>100.00</PTPAY> to the Important notes and it will print on Statements 2,6,7 or the reprint versions as a monthly payment amount.
- 8/12/03 - Added Location Labels in 1up and 3 up formats.
- 8/13/03 - Missed Appointment Report was added to allow you to print a list of appointments missed between two dates. Great to check that all encounters were billed.
- 8/13/03 - Inactive Patient Report - List patient's that have not been seen since a given date. Select all or one provider and a cut-off date. Balance owed is printed.
- 9/15/03 - Added PENDING status to Patient Invoices. This will also put the invoice on HOLD. A new report allows these PENDING invoices to be printed. Use this to track invoices that require additional data to be filed. Often the HOLD status is used for hospital patients awaiting the completion of their treatment. This will help distinguish the two.
- 10/28/2003 Added User Name to transactions added for interest on statements.
- 1/9/2004 Added Screen for Erythropoietin (EOP) Certification used for HCT Results, HGB Results, and Serum Creatine Results. These test results are included with this service to qualify the procedure provided.
- 4/14/04 - Add warning when a provider is selected that has been marked terminated. A provider is terminated by entering a date of termination on his data screen.
- 8/05/04 - Added Fast User Login feature. This will allow systems to be designed to automatically login the user. Use of this feature should be limited to computers that are used by only one person and located in a secured room. The login and password normally used in MOS is added to the login script on the system and all functions in the MOS will use that information. It is important that the Fast User Login be attached to the Unix/Linux log on data or the User ICON for a Windows system. The HIPPA requirements require that the user be controlled and for your own security that must be respected.
- 9/21/04 - Fix Recap Menu Reports to properly reflect the adjustments in the columns. They now match the numbers generated on the summary page of the recap report. Entered Charges, Entered Payments, Entered Write-Offs with the Total A/R Change for Net Change matching the Recap Numbers.
- 10/06/04 - Recap / Transaction Review posting has been changed. The reports following these reports will reflect the totals as follows: The columns Charges, Payments, Write-Offs, Transfers and A/R Change will reflect the totals on the ENTERED line of the recap exactly. The adjustments made to each type of money will be listed in total in the column marked ADJUSTED. This should reflect the total adjustments from the BACKED OUT line on the recap. The A/R change on the reports will indicate the total Charges - Payments - Write-Offs + Transfers. It will not include the amount in the Adjusted column, since it is already part of the money in each other column. The adjustment column on these reports was difficult to reconcile with the daily charges and recap totals and pulling it out of the totals make these numbers match in a more understandable and reliable way.
- 10/20/04 - Fix Change Billing to Also Reset the Electronic Sequence Number so the Invoices will select for Electronic Filing with New claims after the Bill To is changed.
- 11/11/04 - Improved logic for invoice deletion. Deleted Invoices are now archived and logged in the user log. This should offer some additional protection if an invoice is removed. Although it is only possible to delete an invoice with a zero balance that has been properly recapped. That insures that the money has been properly balanced to zero. But since the invoice was present at the time of a recap or two, it may cause daily balances to vary by the amounts on the invoice.

- 2/14/05 - Corrected problem with partial Daily Recap where the recap acted like it was only supposed to print new transactions.
- 2/2005 - Added ordering provider selection to the Service Date Detail (56K).
- 2/2005 - Added Procedures by Carrier (51L) to select procedures between given date for 1 or all carriers and print the total charges, total payments, total writeoffs and total adjustments.
- 3/01/05 - Adjusted the logic for Accident Time to allow any accident to include a time, not just auto accidents.
- 4/15/2005 - Added check for Method Code on a payment. If it was left blank the money would not appear properly on reports, such as Daily Recap and Today's Payment Report.
- 5/2/2005 - Added an option to the Transaction review to allow selection by First Service Date on the Invoice. This will allow the recap menu to generate reports based on the data selected, including Provider, Carrier, or Location Summary Reports.
- 5/2/2005 - Added a selection option to the Service Date Detail Report to select by Ordering Provider. This is only available if the charge line used includes the Ordering provider information.
- 5/2/2005 - Added an export option to the Recap Menu that will allow the totals by Provider, Location, Responsible Party or Entity to be written to a .csv file that can be loaded easily to other software such as Excel for graphing or processing. This is only available on the SUMMARY ONLY reports listed on the right of the menu.
- 6/10/2005 - Enhanced the Charge Allowed logic to use the standard charge for the charge and the allowed for the payment when the carrier has an alternate price table. This behavior will start with all claims added after this correction is installed. Each procedure can use standard charge or allowed charge when creating an invoice. If the standard charge is used, the allowed amount will be the assumed payment.
- 7/1/2005 - Electronic Submission Report - Added to print claims submission history for claims submitted electronically. Only claims still assigned to the selected carrier and not paid in full will be selected. Submission date range can be used to look at a given time, but the best report should include all dates.
- 8/3/05 - Fixed the Activity Graph to create a better print version.
- 10/21/2005 - Added a flag to indicate MISSED appointment when you select Check Appointments. If the from date entered on an invoice does not have the appointment date then the appointment is missed.
- 11/15/2005 - Changed Provider Selection in Scheduling to allow for only providers that have active schedules.
- 12/15/05 - Added option for History Since Date for Patient History in the Clinic version of the MOS. This has an altered output to better print the data. The CLINIC version is installed when the Prescription Module is added to the current system.
- 12/15/05 - Add City to the Insurance Browse from Patient Insurance Screen to allow you to better select the correct insurance company.
- 12/26/05 - Added a Hospital Admit Report (56N). Select all patients with a hospital admit date between given dates for one or all locations.
- 12/26/05 - Added UserID to the Patient Insurance History and the Test Ordering files to track who last entered or changed the data.
- 12/26/05 - Added logic to allow the Patient Insurance History to be pulled back to the live data easily.
- 12/26/05 - Added a Comment to the Test Results Data for additional notes.

- 12/26/05 - Added Family Friendly features to the Family Browse Display. These functions will allow you to put and address change on selected family members. Another option will allow the Primary Carrier to be updated on each selected family member. This is available only on the Family Browse under Patient Utilities.
- 12/26/05 - Fixed Appointment Scheduler to display the day of the week on the screen for a given day.
- 12/26/05 - Add selection for one user to the Activity by User Report. This will allow each user to create a report showing the transactions entered by that user. This report selects by Recap Date also.
- 12/2005 - FASTEMC - for electronic filing clearinghouse options have been increased to allow more payors. Drug claims, chiropractic, ambulance, and many other specialties are now available.
- 1/3/2006 Added a Patient by Location Report (53I) to print patients by claim location for a given time period. One or all locations can be selected. The number of claims per patient (generally indicating how many times they have visited your office) is also listed. Since, this counts claims, if more than one visit is entered per claim, the count would not correctly reflect visits.
- 5/2006 Added a Short Daily Schedule to create a version that would fit on one sheet of paper.
- 5/2006 Added NPI numbers and all the posting required for the MOS to properly handle the NPI numbers when they are required for Electronic filing.
- 5/2006 Corrected Provider posting to FastEMC so that all the numbers for one carrier would be posted to the same provider. This includes Rendering, Billing and Network numbers listed in the special number listing and would correct a problem reported with the proper application of the numbers for group practices.
- 5/2006 Fixed problem with scheduling meetings in the appointment scheduler. It would not display a list of providers correctly.

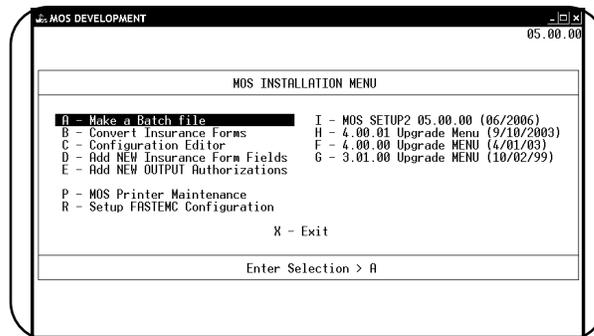
MOS UPGRADE INSTRUCTIONS

INSTRUCTIONS:

Follow your normal installation instructions for Windows or Unix. These were provided in the manual, Chapter 2, or with the last upgrade. Put a check mark next to each step as it is completed.

It will also install the FastEMC as part of the install if you requested. Before it installs the new FastEMC, it will make a safe copy of the current FastEMC or MOS EDI. This can be erased later to save space.

The setup Menu will be displayed when the MOS programming has been installed.



MOS Installation Menu

A - Make a Batch File (Windows Systems Only)

Make sure the "Electronic Claims Version" is ANSI. Other options may vary, but this is required to properly incorporate the new system. Save the record and create the batch file. See Chapter 2 in the manual for more information about the options on this screen. They supply defaults for most customers that work just fine. Just ENTER to the bottom of the page and press ESC to record the page.

I - MOS Setup2 05.00.00

This will load the setup options menu that has all the steps required to speed us through the upgrade easily. The menu is shown to the right.

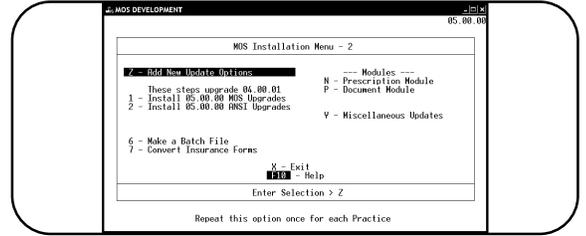


Figure 1-2: Installation Menu - 2

Z - Add New Update Options

Enter **[M]** to update the options for the Main Practice. This will add any settings that might be necessary for your update procedure.

Additional Practices

If your installation has any additional practices that are also included in the MOS installation, select **[A]** and enter the code for each additional practice; one on pass.

Enter **[F]** when the main practice and all additional practices have been selected as required for your installation.

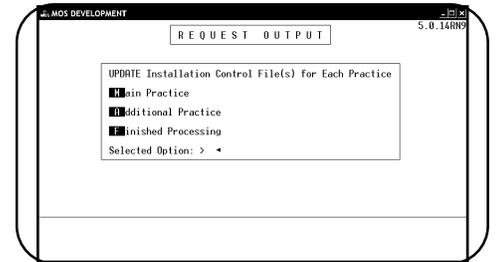


Figure 1-3: Update Options Selections

1 - Install 05.00.00 MOS Upgrades

When the MOS Installation Menu is displayed, select **[1]** to run the steps required to update the practice. This step will next display a popup box.

Select [NONE] to process the Main Practice. The item listed called “new” is not a practice code. Any others that are listed should be processed, each in turn until all are completed.

This step will automate the steps required for your update, to run the steps selectively use the options on the Main Installation Menu.

Each step will run and a prompt is displayed for the option items and you may Skip them when processing an upgrade. Just follow the information displayed on the screen, it should be self explanatory.

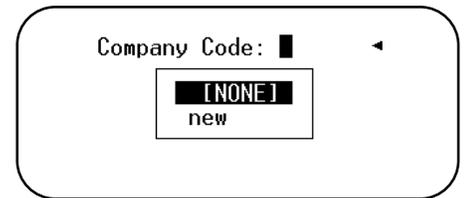


Figure 1-4: Practice Selection

2 - Install 05.00.00 ANSI Upgrades

Any practice that uses FastEMC for Electronic Filing will need to select this option also.

When the MOS Installation Menu is displayed, select **[2]** to run the steps required to update the FastEMC. There is never more than one practice in the FastEMC side of the system so only one pass through this step is required.

N - Prescription Module

This option will update the prescription module. It is an optional package and will only need to be done if your system has installed this module. Full instructions for these are provide separately.

P - Document Module

This option will update the prescription module. It is an optional package and will only need to be done if your system has installed this module. Full instructions for these are provide separately.

Manual Steps on MOS Installation Menu

Most practices will not find any of these steps necessary. They are here in case one of the automated steps fails for some reason. Please do not bother with these.

B - Convert Insurance Forms

This option may be run at this time, but is part of the new installation steps. If you are a multiple practice installation, we have modified the form naming mode. The form code in the Practice Information must be modified to include the company code. Skip this step until that can be changed for the add-on practices. It will be necessary to return to this on the normal MOS Define Print Format Menu to complete that step.

C - Configuration Editor

Select this and load the current configuration. Press to exit and if any prompts indicate that some variables must be added, select to add. Press to export the file and return to the menu.

D - Add new Insurance Form Fields

Press to add new fields. This step should always be done when installing an upgrade.

E - Add new Output Authorizations

Press to add new output security records. This step should always be done when installing an upgrade.

P - MOS Printer Maintenance

This option will allow a new installation to set up the printing functions and printer destinations. Skip this option for an upgrade.

R - Setup FastEMC Configuration

Select this option to do the few items that will allow a quicker setup for FastEMC.

Access to old upgrade steps if required for a practice that has not upgraded recently.

I - MOS Setup 05.00.00
H - 4.00.01 Upgrade Menu (9/10/2003)
F - 4.00.00 Upgrade Menu (4/1/2003)
G - 3.01.00 Upgrade Menu (10/19999)

G:\MOSman40\Installation05_00_00.wpd