



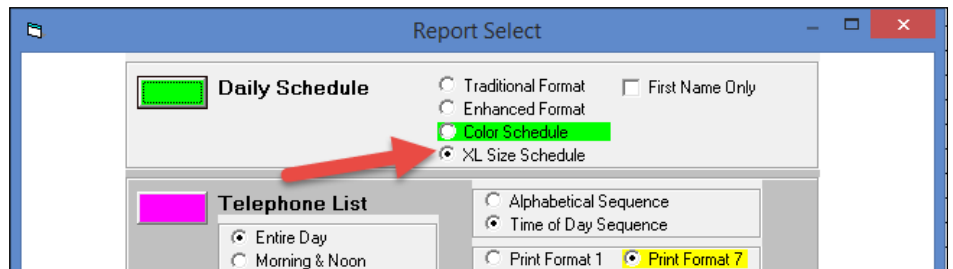
## 2017 Enhancements to Date

We are constantly enhancing and improving PowerSoftMD. Here are some of our exciting, new enhancements we have made since the first of the year:

### Scheduling:

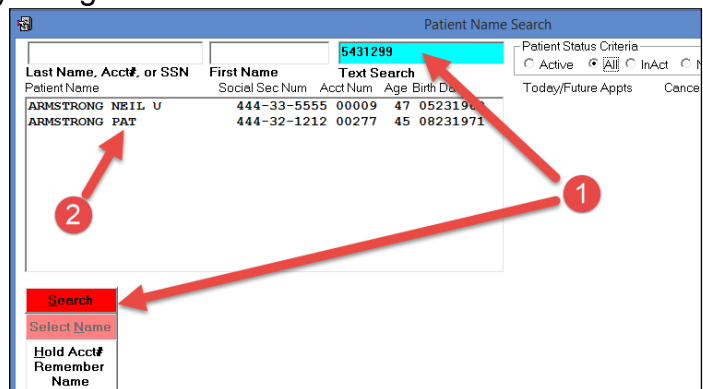
1) On the Schedule, if you mark an appointment as “**Left Msg**” and they call back and confirm, you can quickly click the “**Confirm**” button to mark it as confirmed without removing the “**Left Msg**” status.

2) If you are using the new Schedule format with extended size time slots, there is a new print option to print all the characters. From the Schedule, select the top “Print” option, then “Schedule & Reports” next set the “XL Size Schedule” option, and use the “Daily Schedule” button.



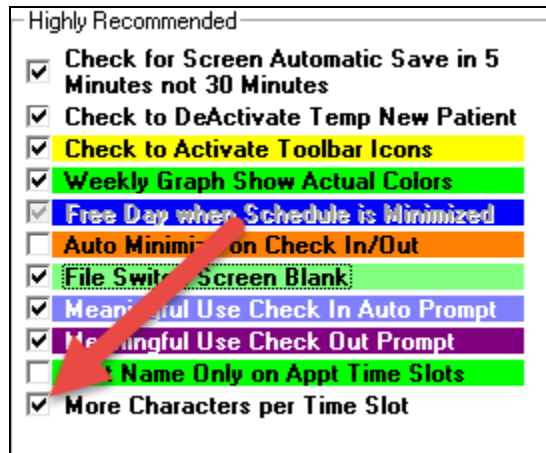
3) When canceling an appointment for a patient, if they appear to have multiple appointments for the same day, even on different schedules, a warning will display showing you the other appointments.

4) The Schedule Name Search window has a new field you can use called “**Text Search**”. You can fill this in to search any string within a Patient’s Name and/or General Screen. Examples are: Phone Numbers, Email Address, Street Address, etc. In this example we used the phone number. Note: The matches will be listed in account number order, not alphabetically.

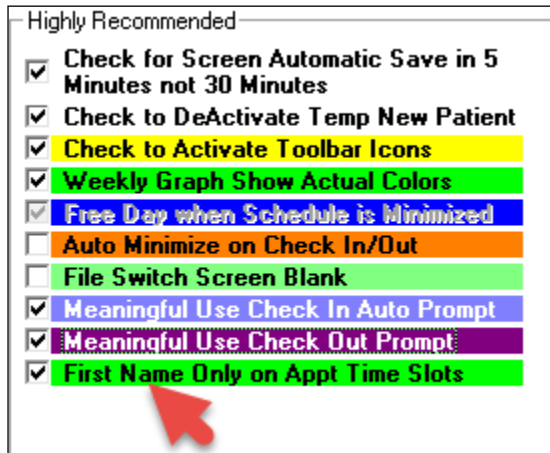


### Scheduling:

5) On the Non-Browse Schedule, you can enter **more characters per time slot** (up to 42). Set this option from the Top of the Schedule screen, select “Utilities”, then “Utility Options Menu”, next “Set Scheduling Options”, then check “More Characters per Time Slot”.

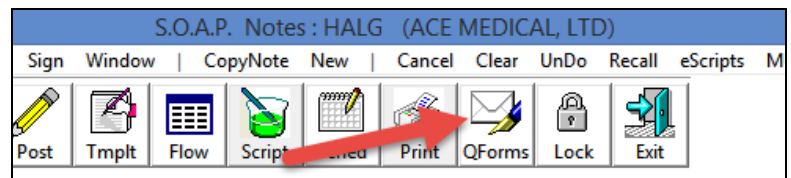


6) There is a new option to place only the **patient’s First Name** and account number on the **Schedule**. Printed reports will still show the patient’s complete name. If you leave the Schedule up on the screen in the operatory, it will be more private. To set this option from the Top of the Schedule screen, select “Utilities”, then “Utility Options Menu”, next “Set Scheduling Options”, then check “First Name Only on Appt Time Slots”.



10:00AM	FRED	{ 2 }
:15	EXCISION	
:30	.....	

7) On the SOAP Note screen, there is a top Icon “QForms” that lets you quickly open Quick Forms with a single click.



8) There is a new EMR report to calculate and list the number of patients refusing portal access over any range of days. From the “Reports Menu”, select “EMR Reports Menu”,

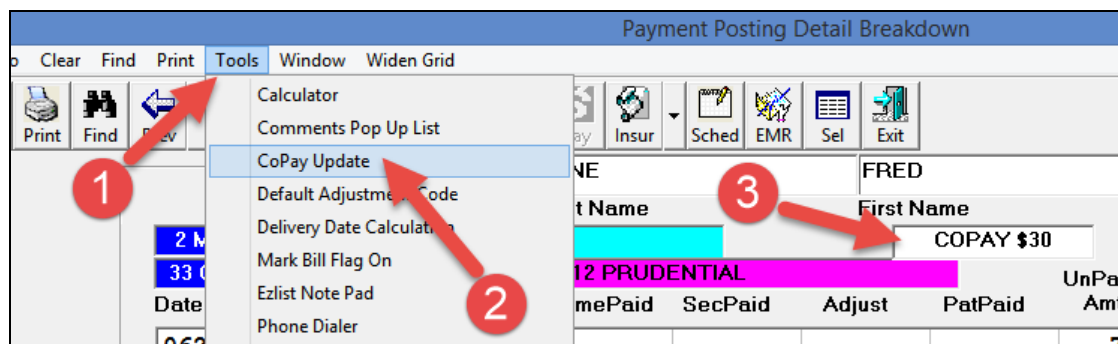
then “Patients Refusing Portal Access”.

9) There is a new EMR report to calculate the number of patients seen over any range of days and how many were sent secure electronic messages. Optionally, you can list the patients’ names. From the “Reports Menu”, select “EMR Reports Menu”, then “Patients Sent Secure Messages”.

10) The Additional Demographics screen stays on top and allows you to change patient phone numbers without having to go back to the General screen.

## Posting:

11) On both the “Posting Charges” and “Payment Posting” screens, you can click the top toolbar “Tools” option, then select “CoPay Update” to update a patient’s CoPay amount. In addition, on the “Payment Posting” screen you can click on the flashing CoPay amount field to update it. As you might know, on the “Posting Charges” screen, if you click on the flashing CoPay amount field it will be used to enter the CoPay Amount in the proper fields for you.



12) When using the “SOAP” button on the Posting screen to enter procedures from the SOAP Note screen, there is a new button called “View SOAP Note” that lets you view the SOAP Note for the date of service you have highlighted.

### Ledger screen:

13) On the Patients Full Ledger Display screen under the “Tools” and then “Options”, you can customize screen field sizes. This is typically NOT recommended, and is usually only used in severe cases with RDP (remote desktop) where the screen isn’t being displayed properly.

### Insurance screen:

14) On the patient’s Insurance screens, you can now enter an optional Date the Insurance was verified.

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10	01	2016	04282017
Last Real Claim			Date Verified

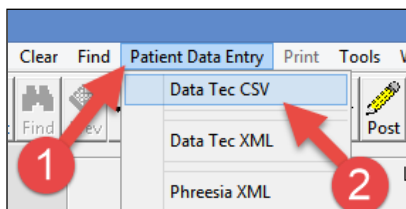
### General screen:

15) On a patient’s General screen, if you set up a patient’s **Alternate Billing Address**, a label “**Alt Bill Addr**” will automatically blink on the left side of the screen. You can click on the flashing label to update the Alternate Billing Address, or use the top toolbar “**Windows**” option, then “**Billing Address**” to create it in the first place.

15) There is a new Advanced Utility function you can run to update the First Visit Dates on all the patient’s General screens. If the patient’s First Visit Date is **blank** or **01012999** and they have charges posted to their ledger their First Visit date will be updated. To run this Utility, go to the “**Advanced Utility Menu**”, select “**Global Changes/Flags/Ins**”, then select the magenta-colored “**Change First Visit Dates**” button.

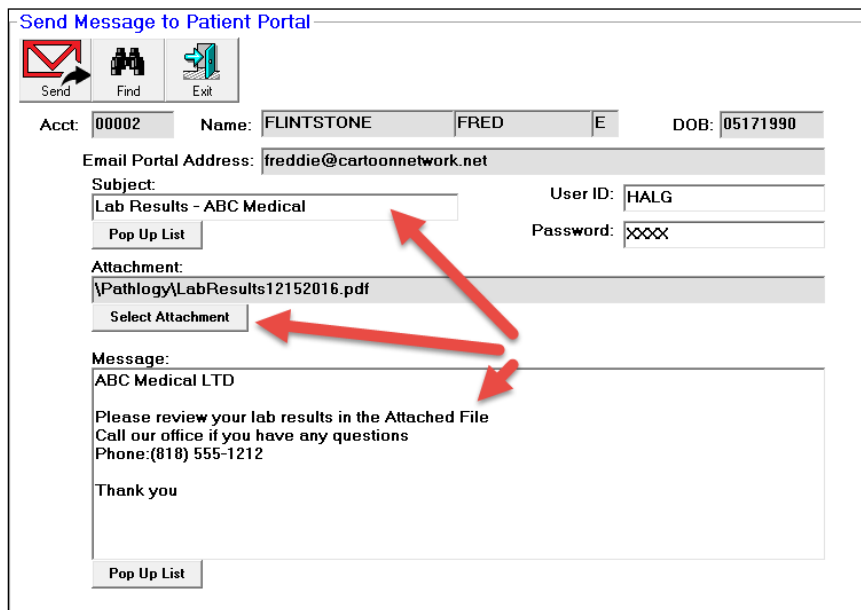
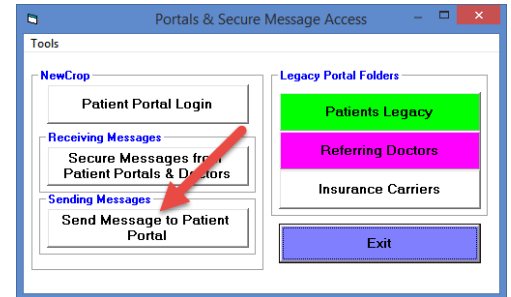
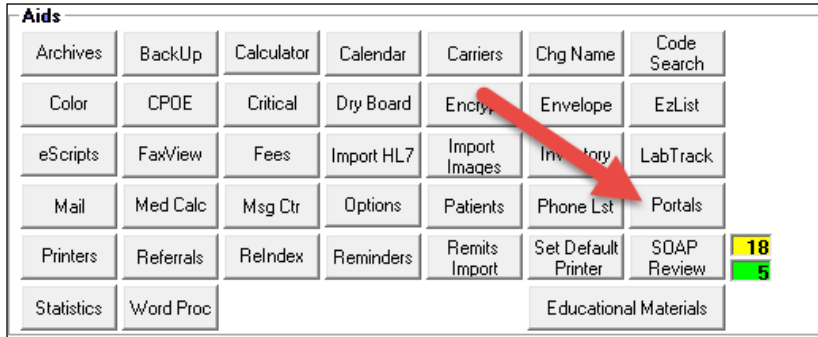
### Importing Demographics:

16) You can import basic patient demographics from a standard CSV file. For example, CSV files created by a page on your website. You can import the demographics from either the patient **Full Add Screen** and/or from the Patient’s **General screen**. Select the top toolbar “**Patient Data Entry**”, and then select “**Data Tec CSV**”. Once on the Import Patient Info window, select one of the import files on the right, change any info on the left you want. If it matches the patient you want, press the Save/Exit button. If you are using this feature from the General screen, only fields that were originally blank on the General screen will be filled in.



### Patient Portal:

17) **NewCrop eScript Users** have a new feature allowing you to send messages to a patient's portal including attaching any document from the patient's documents folder. From the Primary Menu Select the **"Portals"** button, next select **"Send Message to Patient Portal."** On this screen, find the desired patient, enter a subject, use the **"Select Attachment"** button if you want to send a document, and enter a text message.



Thank continued support and **Great Ideas!**

you for your

Cordially,  
*Hal Goodall &*

All your PowerSoftMD Staff 😊