Schedule

- **Schedule – Appointment Details – Patient Details –** The Patient Details section of the Appointment Details screen has been updated to display all primary phone numbers in the patient's account, allowing you to easily access that information should you need to contact the patient to reschedule or cancel an appointment, or for any other reason regarding their healthcare. See Figure 1.
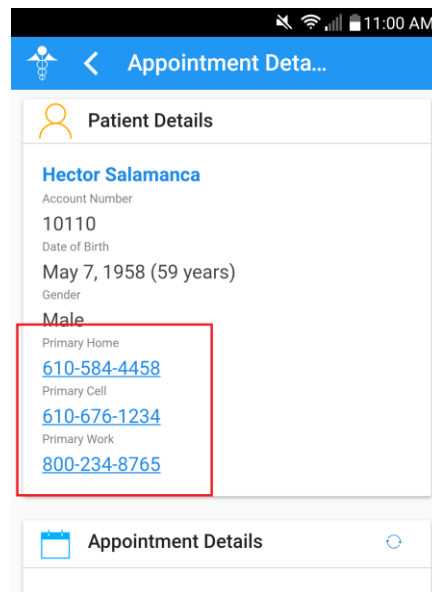

Figure 1 – Schedule – Appointment Details – Patient Details

- **Schedule – Appointment List –** The appointment Schedule screen has been updated to display the number of appointments that are in the current appointment list being displayed. The number of appointments will appear above the Filter button. See Figure 2.
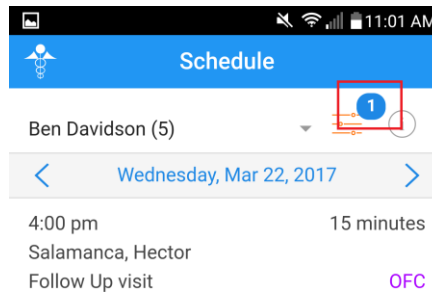

Figure 2 – Schedule – Appointment List

Patient

- **Patient – Patient Details –** The Patient Details screen has been updated to display any Reaction and Severity for Allergies when configured for a patient. See Figure 3.

Figure 3 – Patient Details – Allergies

Charge Capture

- **Charge Capture –** The Charge Capture user-interface has been updated with several small modifications to enhance the user-experience, making the screens more consistent, clear, and easier to maneuver. Back and close buttons have been added where applicable, option verbiage has been updated where needed, and spacing and overall aesthetic concerns have been addressed to give an improved mobile experience.

- **Charge Capture – Enter Diagnosis** – The **Enter diagnosis** functionality in the Charge Capture screen has been enhanced to allow you to easily select and search for diagnoses for the patient. You can now select from recently used diagnoses (**Recent Dx**), select from the active, inactive, and pre-existing diagnoses from the patient's facesheet (**Facesheet Dx**), and search for any diagnosis in the system (**Dx Search**), to configure current diagnoses for the charge you are capturing. Any of these methods can be used in conjunction when entering diagnoses, and the selected diagnoses (up to five) will be queued in **Dx Review** area where you can confirm your diagnostic selections.

  After you have accessed the Charge Capture area, you can tap the **Enter diagnosis** link (see Figure 4), and you will default to the Recent Dx screen. See Figure 5. You can then toggle between the **Recent Dx** (the compass icon), **Facesheet Dx** (the stethoscope icon), **Dx Search** (the magnifying glass icon), and **Dx Review** (the paper airplane icon) by tapping the applicable icon below.
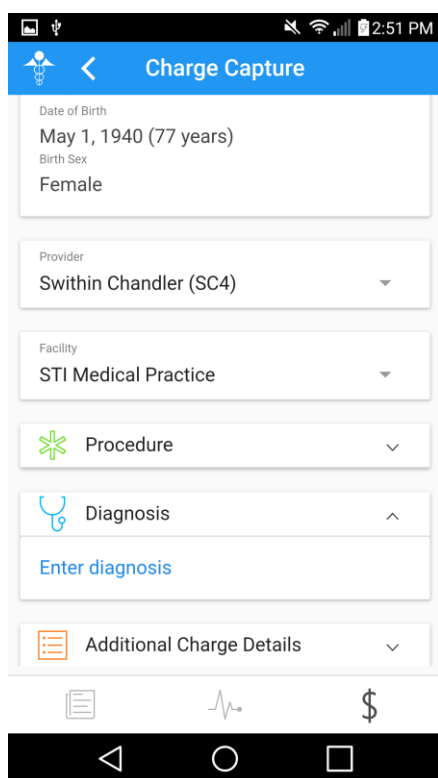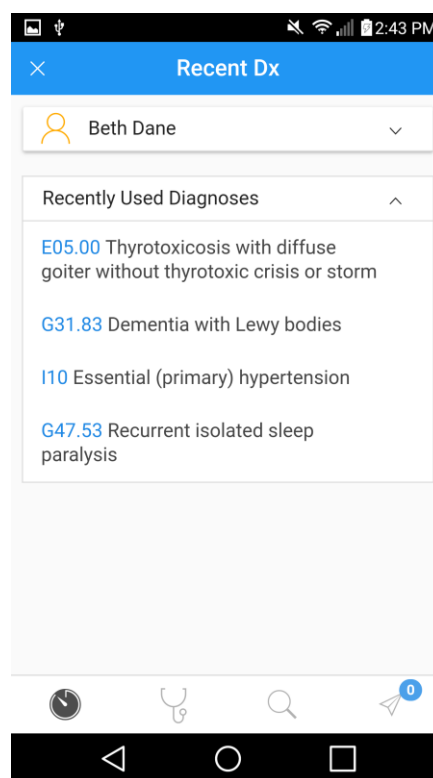

Figure 4 – Charge Capture

Figure 5 – Recent Dx

Charge Capture (continued)

Charge Capture – Enter Diagnosis (continued)

To select a diagnosis in the Recent Dx and Facesheet Dx screens, tap the diagnosis you wish to add, and a check will appear next to the diagnosis, and the Dx Review icon will keep a tally of the number of diagnoses you have selected. See Figure 6.
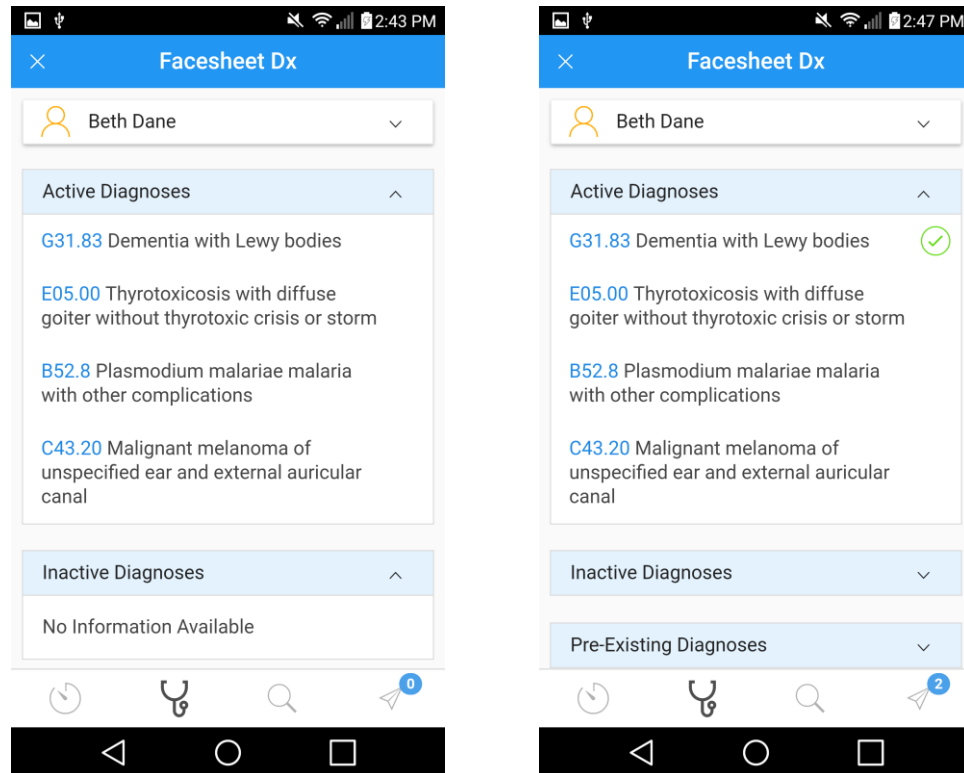

Figure 6 – Facesheet Dx

When you click **Dx Search** icon you will enter the Dx Search screen where you can search diagnostic codes by ICD10 **Description**, or by ICD10 **Code**. You can toggle between these options by tapping the **Search By** button to the left of the **Search** field. See Figure 7.

You can then enter a description or code in the Search field, or you can tap through the diagnostic tree below to find the applicable diagnosis.

When entering a description or code in the **Search** field, the system will narrow the diagnostic tree based on your search criteria. See Figure 8. You can then tap through the various diagnostic categories until you locate the billable diagnosis code you want to select. See Figures 9 and 10. As when selecting diagnoses in the Recent Dx and Facesheet Dx screens, when you select a diagnosis in the Dx Search screen a check will appear next to the diagnosis, and the Dx Review icon will keep a tally of the number of diagnoses you have selected.

Charge Capture (continued)

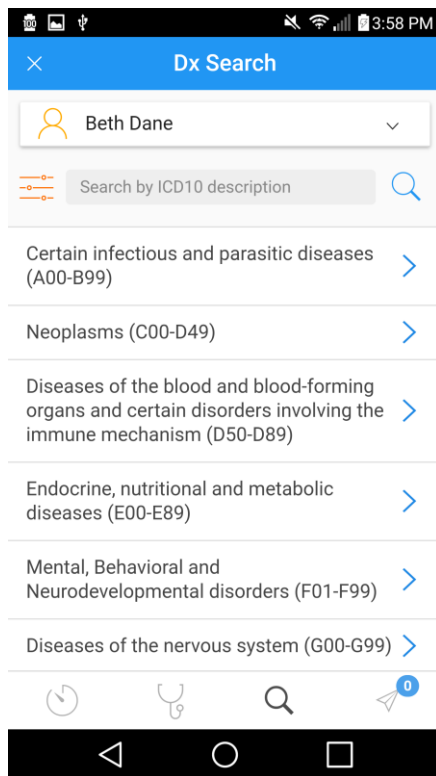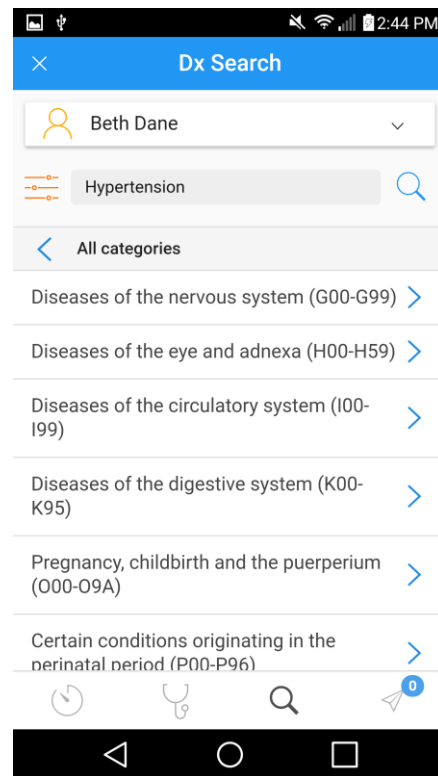## Charge Capture – Enter Diagnosis (continued)

Figure 7 – Dx Search
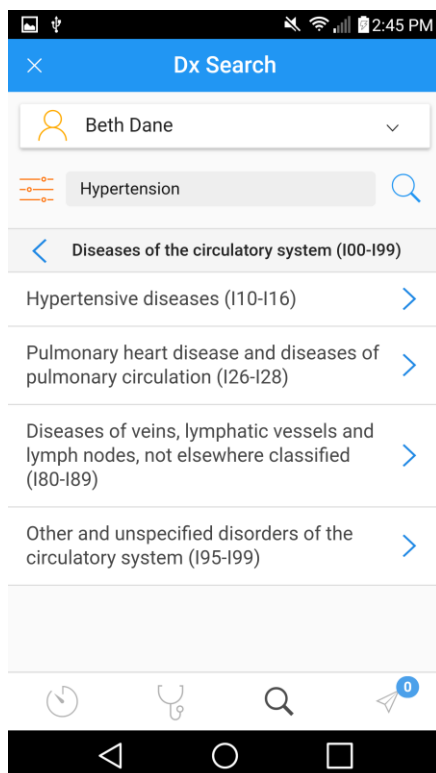

Figure 8 – Dx Search with Description
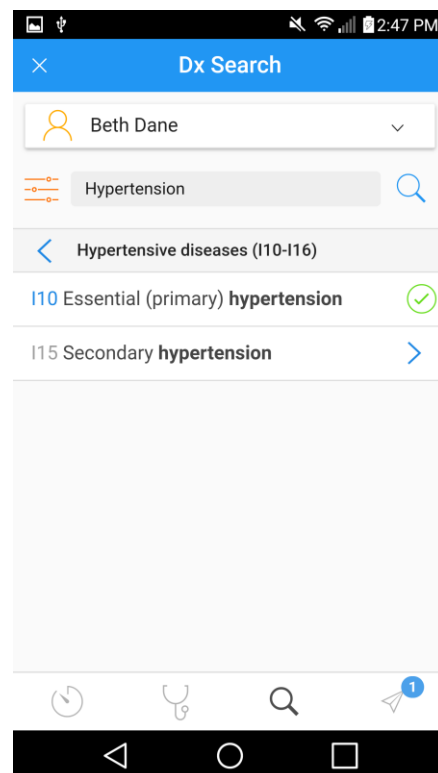

Figure 9 – Dx Search – Toggling Categories

Figure 10 – Dx Search – Selected Dx

Charge Capture (continued)

Charge Capture – Enter Diagnosis (continued)

After all the applicable diagnoses have been selected in the Recent Dx, Facesheet Dx, and/or Dx Search screens, you can click the **Dx Review** icon to go to the Dx Review screen to review and finalize your diagnostic selections. See Figure 11. In the Dx Review screen you can remove any diagnoses that you do not want to include with the charge by tapping the **Trash** button next to diagnosis. Once all diagnoses have been reviewed, click the **OK** button to add the selected diagnoses to the charge capture. Those diagnoses will then appear in the Diagnosis area of the Charge Capture screen. See Figure 12.
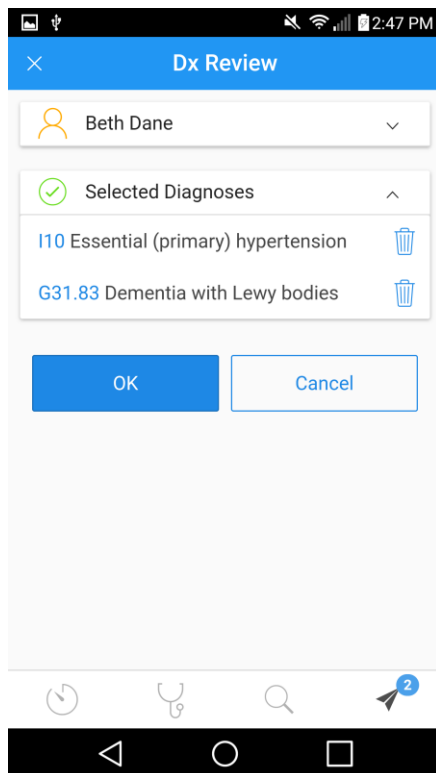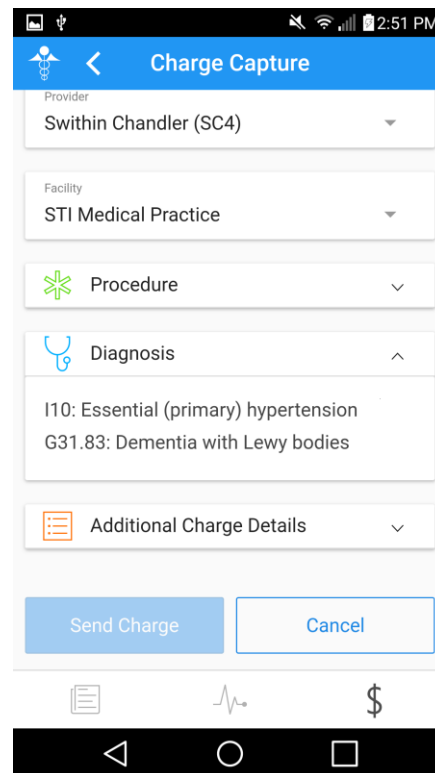

Figure 11 – Dx Review

Figure 12 – Charge Capture

Charge Capture (continued)

- **Charge Capture – Enter Procedure** – The **Enter procedure** functionality in the Charge Capture screen has been enhanced to allow you to easily select and search for procedures for the patient. You can now select from a practice-level **Procedure List**, or search for any procedure in the system (**Procedure Search**), to configure a procedure for the charge you are capturing. Practice-level procedure lists are maintained via **Settings** > **Procedure List**. You can create a single list, or multiple lists, per your office's needs.

  After you have accessed the Charge Capture area, you can tap the **Enter procedure** link (see Figure 13), and the **Procedure List** screen will default. See Figure 14. You can then select a procedure in the **Procedure List** (star icon) screen, or search for a procedure in the **Procedure Search** (the magnifying glass icon) screen by tapping the applicable icon below.

  In the **Procedure List** screen, you can toggle the various procedure lists open and closed by tapping the corresponding **arrow** button to the right of each of the lists. Once the applicable procedure is located, simply tap it to select it.

Figure 13 – Charge Capture

Figure 14 – Procedure Lists

When you click **Procedure Search** icon you will enter the Procedure Search screen where you can search procedure codes by **Description**, or by **CPT Code**. You can toggle between these options by tapping the **Search By** button to the left of the **Search** field. See Figure 15.

When entering a description or code in the **Search** field, the system will display any procedures that contain any of the description or code based on your search criteria. See Figure 16. You can then scroll through the list, and once the applicable procedure is located, tap that procedure to select it.

After the procedure has been selected it will appear in the Procedure section of the Charge Capture screen. See Figure 17.

Charge Capture (continued)
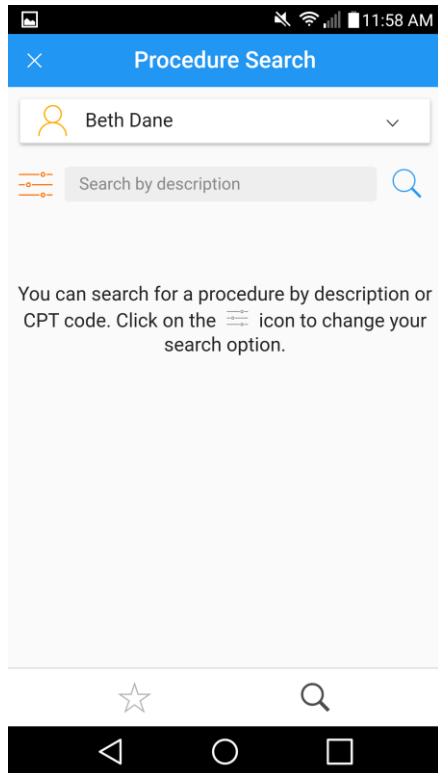
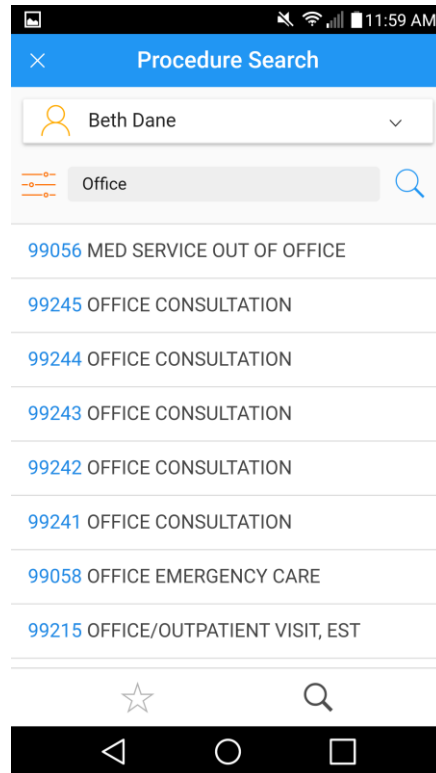## Charge Capture – Enter Procedure (continued)

Figure 15 – Procedure Search

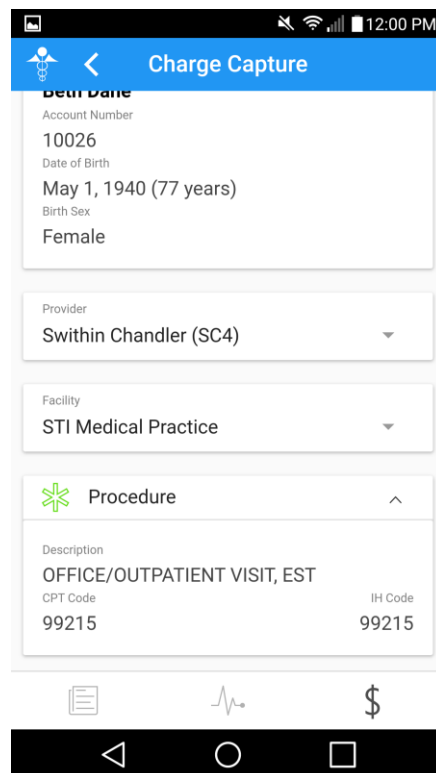**Figure 16 – Procedure Search with Search Criteria**

Figure 17 – Charge Capture with Procedure Selected

Charge Capture (continued)

- **Settings – Procedure Lists** – To assist you in easily and efficiently selecting procedures for charge capture, the system has been updated with the ability to create practice-level **Procedure Lists** via the Settings submenu. See Figure 18.

  Once the Procedure Lists area has been accessed, you can create and maintain procedure lists. In the Procedure Lists screen, you will see any practices that have procedure lists configured. To maintain an existing procedure list, select the applicable list under the practice name. See Figure 19. To create a new procedure list, select the **Create List** option.
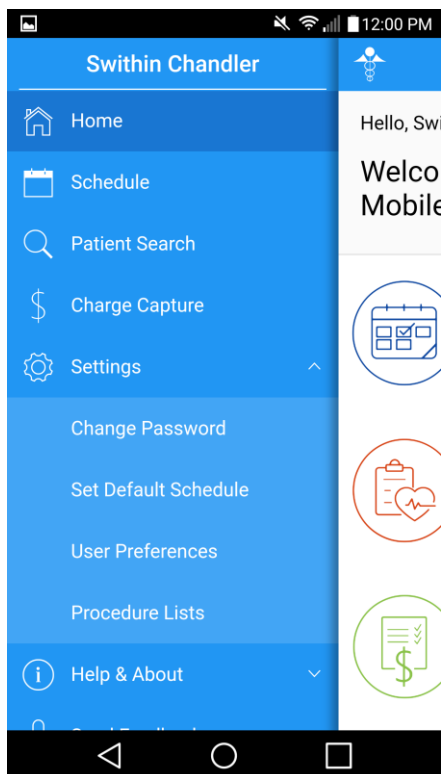

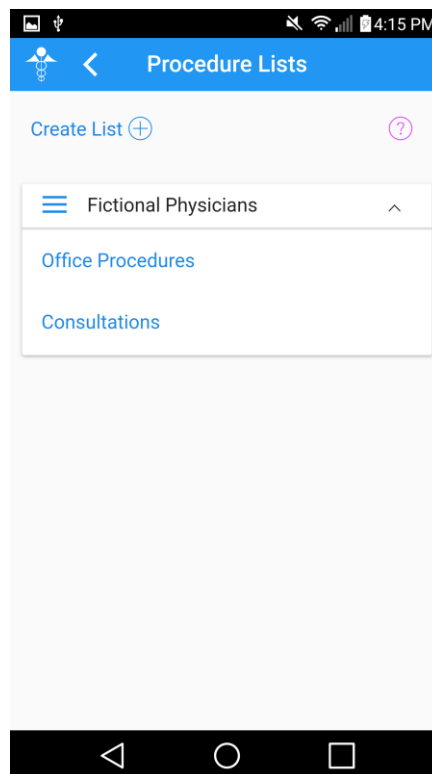**Figure 18 – Menu – Settings – Procedure Lists**   **Figure 19 – Procedure Lists**

When creating a new procedure list, you can select which practices you want the list to be available for, and then tap the **Create** button. See Figure 20. In the Edit Procedure List screen, you can then enter or modify a **List Name**, and then add procedures by selecting the **Add Procedure** option. See Figure 21. When the Add Procedure option is selected, you can search for and select the applicable procedures to add to the list in the Procedure Search screen. See Figure 22.

When the procedures are selected, they will be added to the **Procedures** list in the Edit Procedure List screen. See Figure 23. In the Edit Procedure List screen, you can add additional procedures by clicking the **Add Procedure** option. You can remove any added procedures that you do not want to include in the list by tapping the **Trash** button next to procedure. Once all procedures have been selected for the list, you can tap the **Save List** option. To remove the list, you can tap the **Delete List** option.

When procedure lists have been created, they will appear in the Procedure List screen when entering a procedure for charge capture for the applicable practices.

Charge Capture (continued)

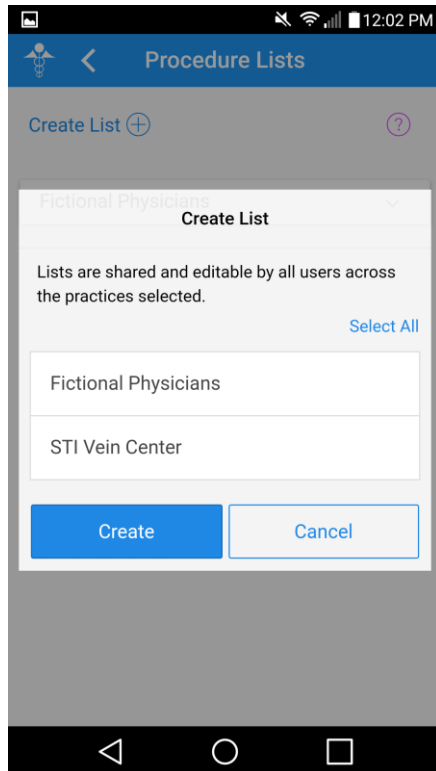### Settings – Procedure Lists (continued)

Figure 20 – Create List

Figure 21 – Edit Procedure List

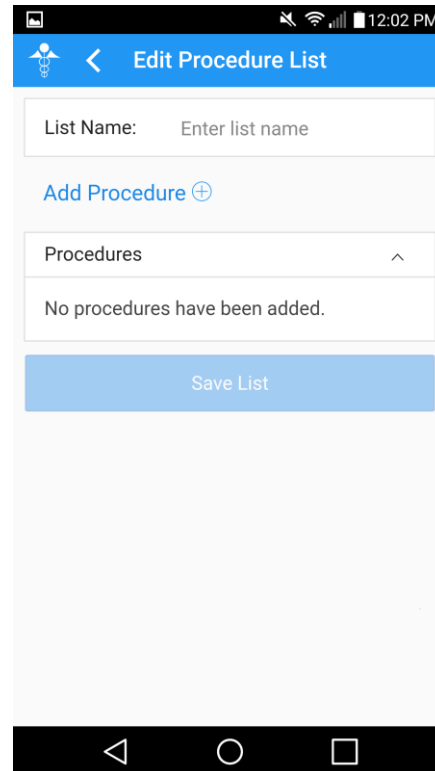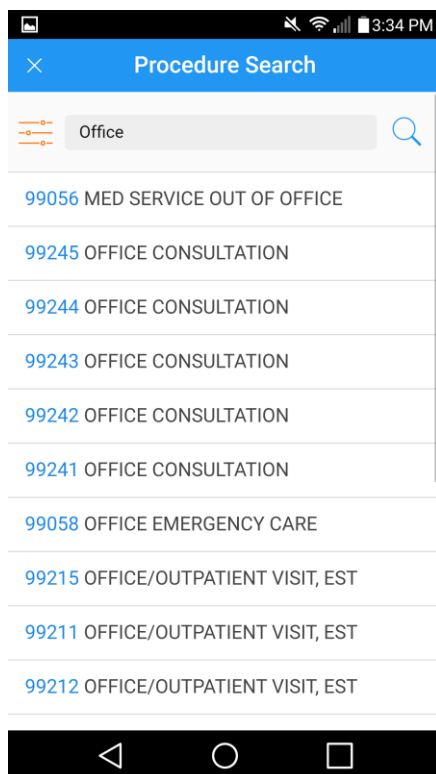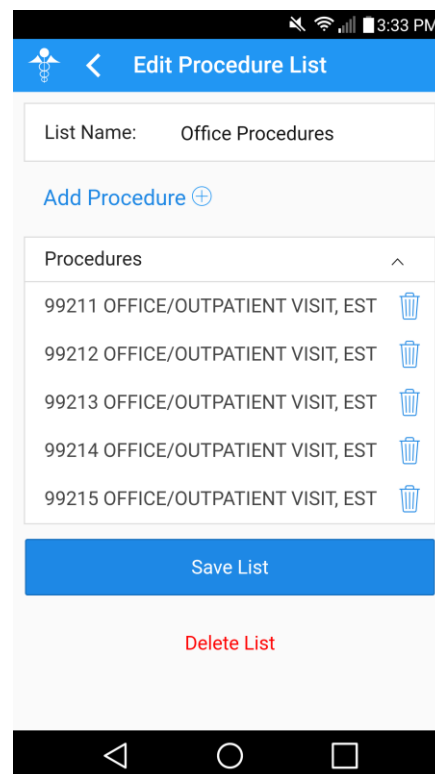**Figure 22 – Procedure Search**

Figure 23 – Edit Procedure List with Procedures Selected