

Medisoft Features Evolution Matrix

Electronic Health Record (EHR) Integration	v12	v14	v15	v16
Basic Patient Demographic and Appointment Feed From Practice Management to EHR			✓	✓
Electronic Encounter Form Feed of Transactions to Practice Management System			✓	✓
Customizable HL7 Interfaces with EHR			✓	✓
Enhanced One-way Data Flow From Practice Management to EHR via Updated A04 and A08 Patient Message				✓
– Phone Number				
– Cell Phone				
– E-mail Address				
– New Insurance Carriers				
– New Referring Physicians				
Appointment Status Updates Sent via Bi-directional Data Exchange				
New Communication Manager Controls				✓
– Determine if Appointment Status Updates have been Transmitted and Received				✓
– Send Enhanced Library Resources to Medisoft Clinical, Including Provider, Facility, Procedures and Diagnosis Updates				
New DVD Install Includes Medisoft v16 Client Server and Medisoft Clinical on One DVD (greatly reduces the number of screens that require user intervention)				✓

Insurance	v12	v14	v15	v16
Automatic Rebill for Claims	✓	✓	✓	✓
Insurance Groupings for Reporting and Analysis	✓	✓	✓	✓
Remittance Tracking for Secondary Claims	✓	✓	✓	✓
Integrated Electronic Eligibility Checking	✓	✓	✓	✓
Aging View in Transaction Entry	✓	✓	✓	✓
UB-04 Paper and Print Image		✓	✓	✓
Custom Dates on ERA Posting		✓	✓	✓
Revenue Management Integrated Electronic Claims Solution (improves claim, eligibility and remittance processing)				✓
Customizable and Flexible Grid Entries for Insurance Carriers, Providers, Your Practice and Your Data Requirements (improves claim generation)				✓
Eligibility Data Entry and Processing Logic (gives greater control and the ability to manage payor IDs)				
Ability to Define When the System Checks for Eligibility Updates (enhances system performance)				✓
Enhanced Search Filters in Payor ID Lookup Window (includes ability to add, edit and delete a record)				✓
Security Assignments Same for Insurance and Eligibility (streamlines eligibility security and access)				✓

Accounting/Billing	v12	v14	v15	v16
Customized Aging Buckets	✓	✓	✓	✓
Withhold Code Type for Procedure Codes	✓	✓	✓	✓
Automatic Rebill for Claims	✓	✓	✓	✓
Serialized Superbills	✓	✓	✓	✓
Multi-link Treatment Plans	✓	✓	✓	✓
Deactivate Codes	✓	✓	✓	✓
Color-coding Transactions and Quick Ledger	✓	✓	✓	✓
Dunning Messages for Statements	✓	✓	✓	✓
Statement Management	✓	✓	✓	✓
Cycle Billing	✓	✓	✓	✓
Rules-based Collection Assignments	✓	✓	✓	✓
Actionable Collection Worklist	✓	✓	✓	✓
Task or Date-driven Collection Workflow	✓	✓	✓	✓
On-demand Collection Letters	✓	✓	✓	✓
Automatic Recalculation of Patient Remainder Balance	✓	✓	✓	✓
Automatic Small Balance Write-offs	✓	✓	✓	✓
Missed Co-pay Tracking	✓	✓	✓	✓
Unprocessed Transactions (Holding Tank)	✓	✓	✓	✓
Global Days (surgical billing)		✓	✓	✓
Billing for Eight Diagnosis Codes		✓	✓	✓
Missed Co-pay Remainder Statement			✓	✓
Small Balance Write-off by Statement Submission Count			✓	✓
Statement Manager Remainder Balance Display			✓	✓
Collection List Link to Quick Ledger			✓	✓
Deposit List Detail Print			✓	✓

Reporting	v12	v14	v15	v16
Facility Report	✓	✓	✓	✓
Quick Receipt and Quick Statement	✓	✓	✓	✓
Patient Collections Reports	✓	✓	✓	✓
Insurance Collections Reports	✓	✓	✓	✓
Unapplied Co-payment Report	✓	✓	✓	✓
View and Print All Future Appointments for Patients	✓	✓	✓	✓
Export to Microsoft® Excel	✓	✓	✓	✓
Standard Patient by Insurance Report	✓	✓	✓	✓
Standard Patient by Diagnosis Report	✓	✓	✓	✓
Standard Patient by Procedure Report	✓	✓	✓	✓
Case Billing Code Filter on Standard Reports	✓	✓	✓	✓
Dashboard – Totals		✓	✓	✓
Dashboard – Trending		✓	✓	✓
Medisoft Reports (formerly Focus Reports Standard) – Includes reports previously available in Medisoft, plus more than 200 additional reports			✓	✓
File Maintenance Progress Reporting			✓	✓
Blank Appointment Indicator			✓	✓
Print Blank Superbills			✓	✓

Security/HIPAA	v12	v14	v15	v16
Five Levels of Permissions and Security	✓	✓	✓	✓
Print Permissions Grid	✓	✓	✓	✓
Auto Log-off	✓	✓	✓	✓
Warning on Unapproved Codes	✓	✓	✓	✓
Unique Identifier Fields	✓	✓	✓	✓
Security Permissions on Reports	✓	✓	✓	✓
ANSI Standard Electronic Claims	✓	✓	✓	✓
HIPAA Security Ready	✓	✓	✓	✓
Rules-based Password Management	✓	✓	✓	✓
User Access History Reporting	✓	✓	✓	✓
Multi-level Trigger Management	✓	✓	✓	✓
Global Security	✓	✓	✓	✓
Security Added to MediUtils	✓	✓	✓	✓
Integrated Reporting Security				✓

Usability	v12	v14	v15	v16
Set Default Data Fields	✓	✓	✓	✓
Customizable Tool Bar	✓	✓	✓	✓
Option to Display Subtotals	✓	✓	✓	✓
Customized Data Screens	✓	✓	✓	✓
Warning on Duplicate Patient	✓	✓	✓	✓
Auto Tax Entry	✓	✓	✓	✓
Streamlined Transaction Entry	✓	✓	✓	✓
Field Data Checking	✓	✓	✓	✓
Patient Flagging	✓	✓	✓	✓
Show Remainder When Applying Payments	✓	✓	✓	✓
Apply to Oldest When Applying Payments	✓	✓	✓	✓
Select Multiple Claims to Print or Reprint	✓	✓	✓	✓
Enter Payments Directly from Office Hours Professional	✓	✓	✓	✓
One-click to Change Responsibility for Transactions	✓	✓	✓	✓
Streamlined Quick Ledger View	✓	✓	✓	✓
Rules-based Worklist for Daily Office Tasks	✓	✓	✓	✓
Copy, Edit, Add New Case Directly from Office Hours Professional	✓	✓	✓	✓
Reschedule Status in Office Hours Professional	✓	✓	✓	✓
Audit Generator with Chart Number Filtering	✓	✓	✓	✓
Patient Quick Entry		✓	✓	✓
Multi-practice Conversion		✓	✓	✓
Scheduled File Maintenance		✓	✓	✓
Dashboard – Warnings		✓	✓	✓
Dashboard – Logged-in Users Utility		✓	✓	✓
Last Selected Chart Number Hot-key			✓	✓
Default Printer Option for Custom Reports			✓	✓
Transaction Entry Sortable Grids			✓	✓
Customizable Transaction Sort on Patient Statements			✓	✓
Edit/Enter Patient Notes from Quick Ledger			✓	✓
Claim Management Sorting Save			✓	✓
Updated User Interface Implements New Colors, Icons, Window Controls, etc., Introduced with Microsoft® Office 11 (enhances the user experience and improves navigation)				✓
DVD Install (reduces installation time)				✓
Customizable Tool Bar in Office Hours				✓

Special Features	v12	v14	v15	v16
Office Messenger	✓	✓	✓	✓
Multimedia File Storage	✓	✓	✓	✓
Online Updates	✓	✓	✓	✓
Encoder Pro	✓	✓	✓	✓
Integrates with Microsoft Excel	✓	✓	✓	✓
Interfaces with Lab Systems	✓	✓	✓	✓
Patient Archiving	✓	✓	✓	✓
Workflow Administrator	✓	✓	✓	✓
Data Collaboration	✓	✓	✓	✓
Standard Integrated Word Processor	✓	✓	✓	✓
Standard Chart Number Change Utility	✓	✓	✓	✓
HL7 Interface	✓	✓	✓	✓
Integrated Dashboard	✓	✓	✓	✓
Data Export/Import		✓	✓	✓
Future Appointment Warning			✓	✓
Phone Number Fields in Appointment Entry			✓	✓

medisoft®

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