Table of Contents

Started Secured Messaging with Patients to Meet MU Criteria

The practice users will be able to communicate with the patient portal users through secured messaging. The system is enhanced in such a way that the 2-way electronic communication is now possible between patients and practice users. This will help the practice to meet the Meaningful Use 2 Core #17 measure.

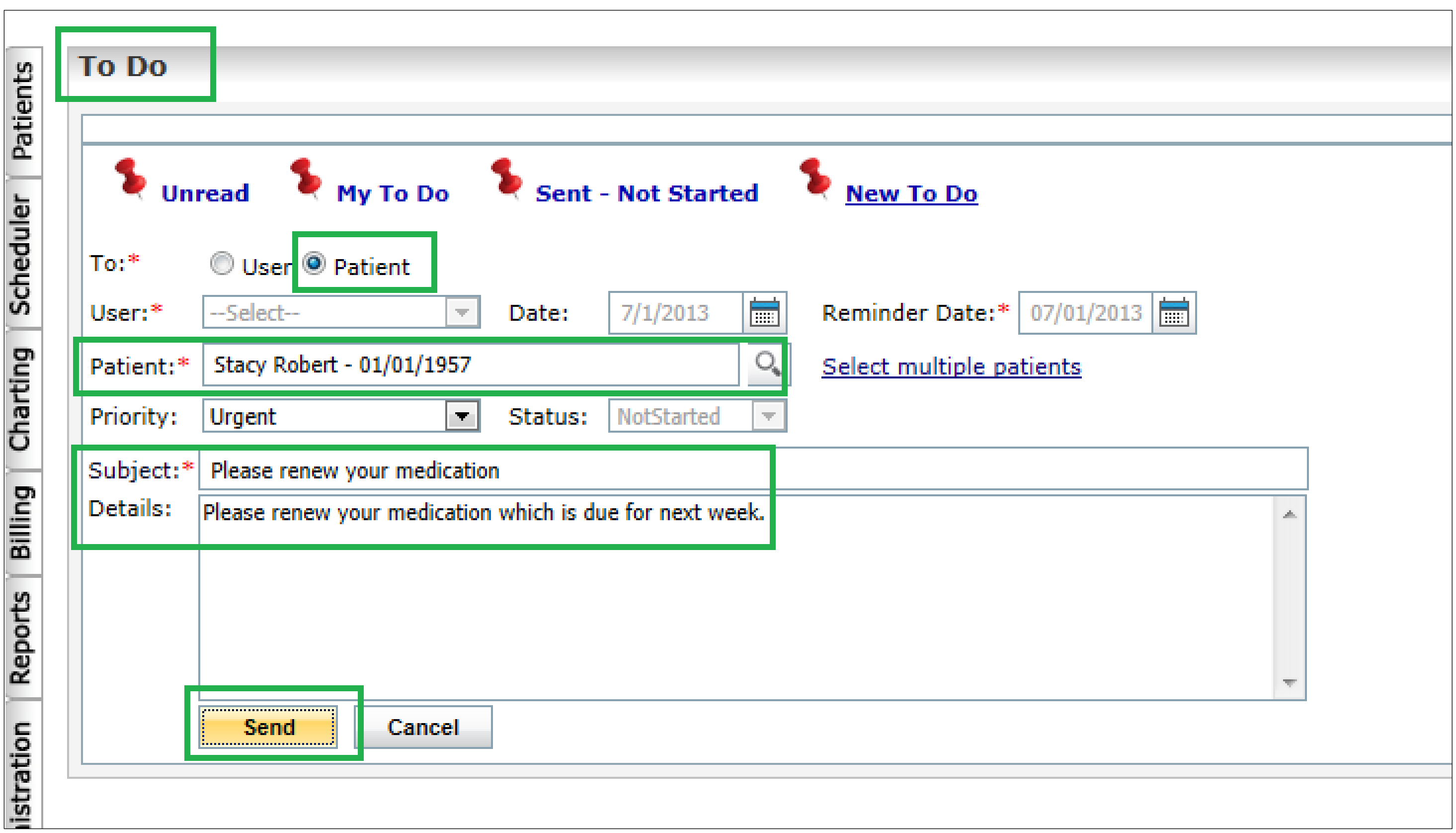
Sending a Message to Patient

The practice user can communicate with the patient portal user from the To Do section on the Dashboard page. The practice user can send a message and receive it back when the patient portal user responds to the message.

To send a message to the patient:

- In the To Do section on the Dashboard page, click New To Do.
- Select the *Patient* option.
- In the *Patient* field, select the patient.
- Enter the brief message in the *Subject* section.
- Enter the detailed message in the *Details* section.
- Click *Send*.

Figure 1: Sending a Message to Patient



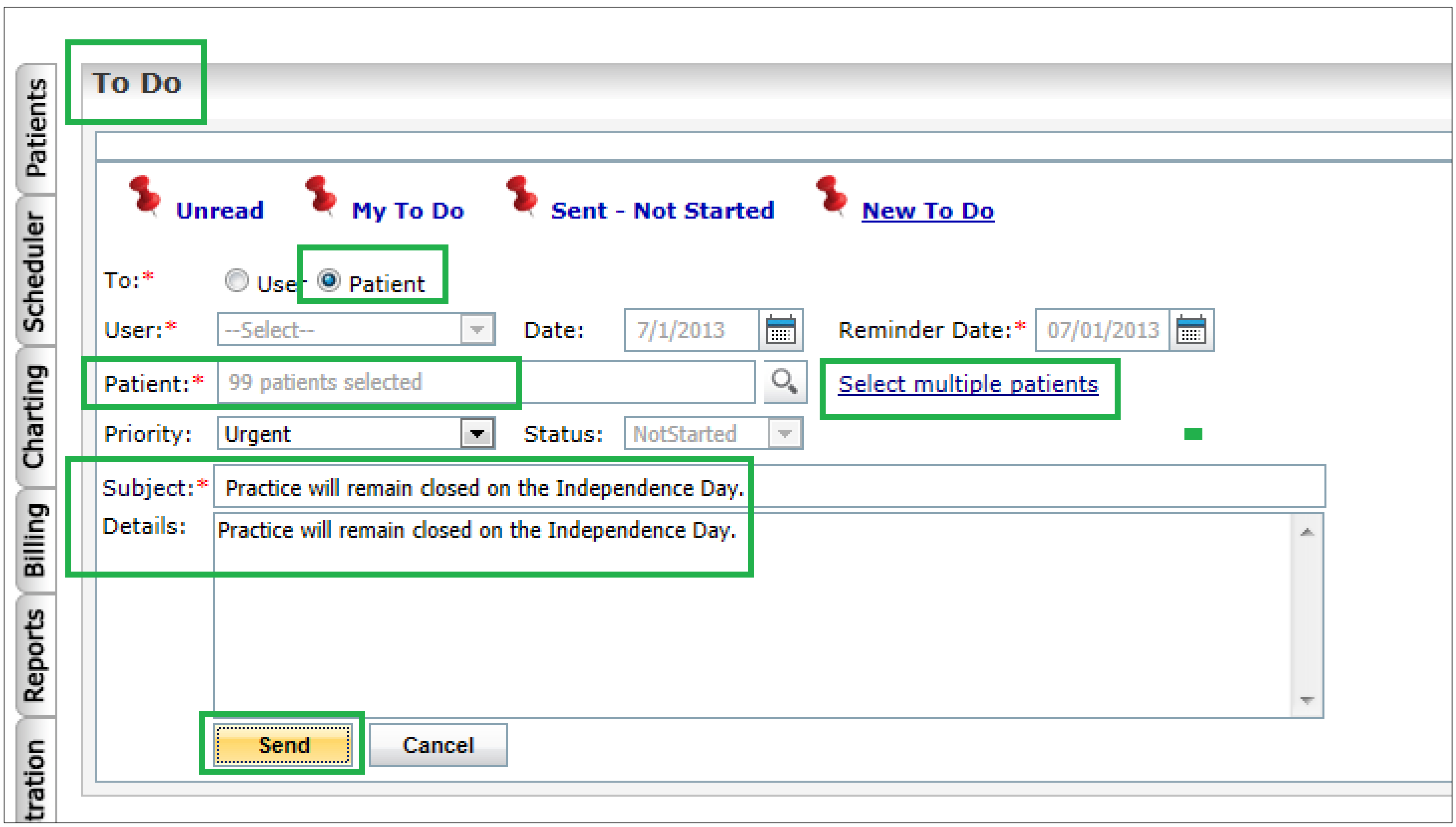
Sending a Message to Multiple Patients at Once

The practice user can also send the message to multiple patients at once.

To send a message to multiple patients:

- In the To Do section on the Dashboard page, click New To Do.
- Select the *Patient* option.
- Click *Select Multiple Patients* link and select the patients to which you want to send the message.
- Enter the brief message in the *Subject* section.
- Enter the detailed message in the *Details* section.
- Click *Send*.

Figure 2: Sending a Message to Multiple Patients



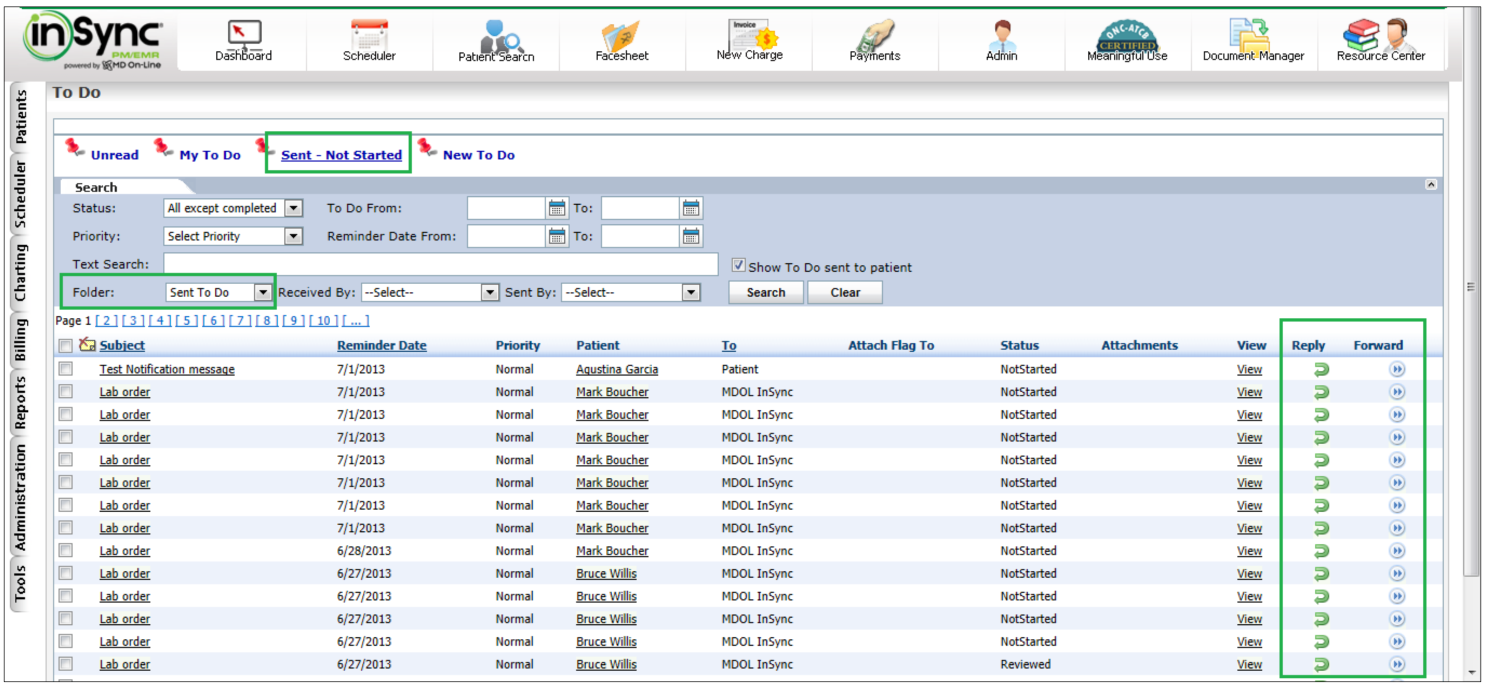
Replying and Forwarding Messages from Sent Items

The system allows the user to reply and forward the messages from the Sent Items section. Earlier the users were allowed to reply or forward only incoming messages, which is now also possible for sent items.

To reply to or forward a message from sent items:

- In the To Do section on the Dashboard page, click *Sent – Not Started*.
- Locate the *Reply* and *Forward* options as displayed in screen shot.

Figure 3: Replying to or Forwarding a Message



Configuring Automatic Notification for Unread Messages

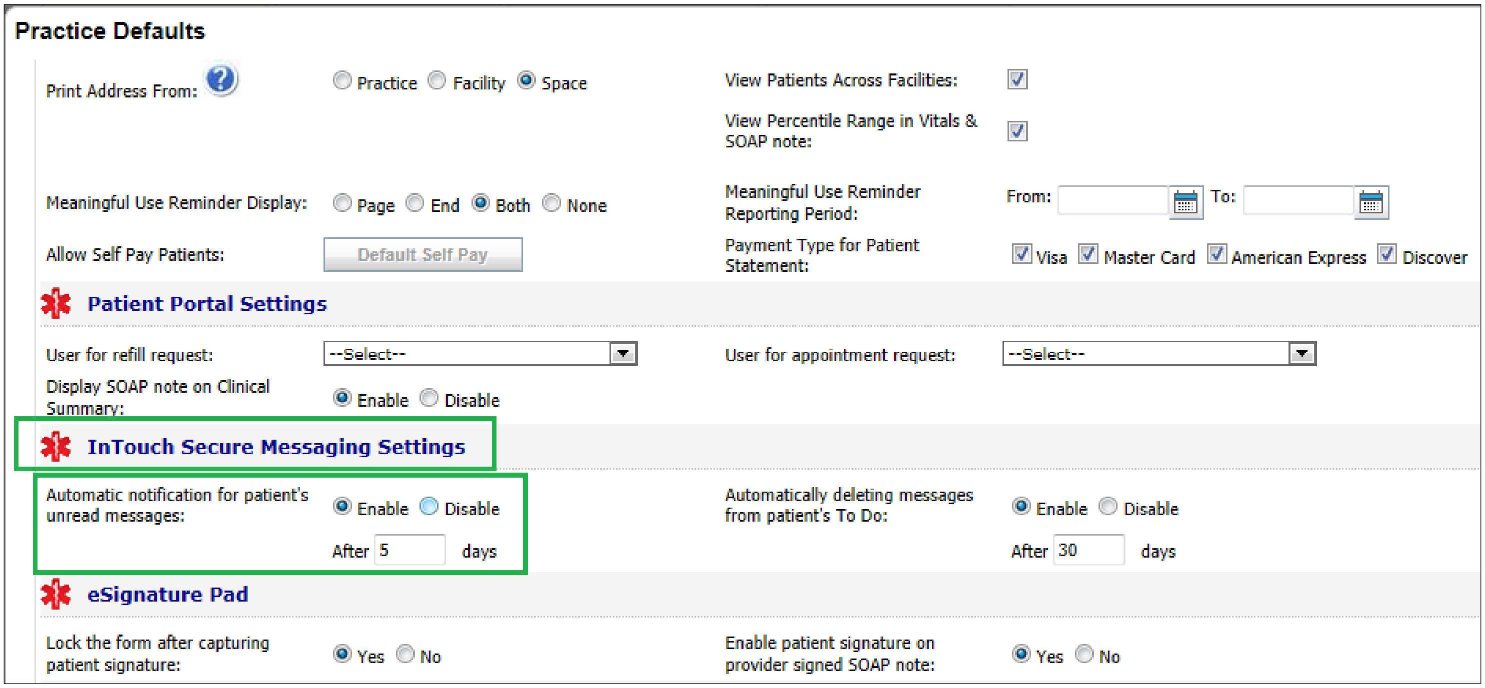
When the practice user sends messages to the patients that are not read by them, the messages are returned back to the user's *My To Do* section. Such messages are updated with status "Returned unread" in the system. The practice user can configure a specific number of days after which a notification will be sent to the practice user mentioning that the message is returned unread.

To configure notification for unread messages:

- Select Administration > Practice Management.
- Click the Practice Defaults link.
- Expand the InTouch Secure Messaging Settings panel.
- In the *Automatic notification for patient's unread messages* section, select *Enable*.

- Enter a specific number of days after which you want the unread message to be returned back to the practice user's inbox.
- Click *Save*.

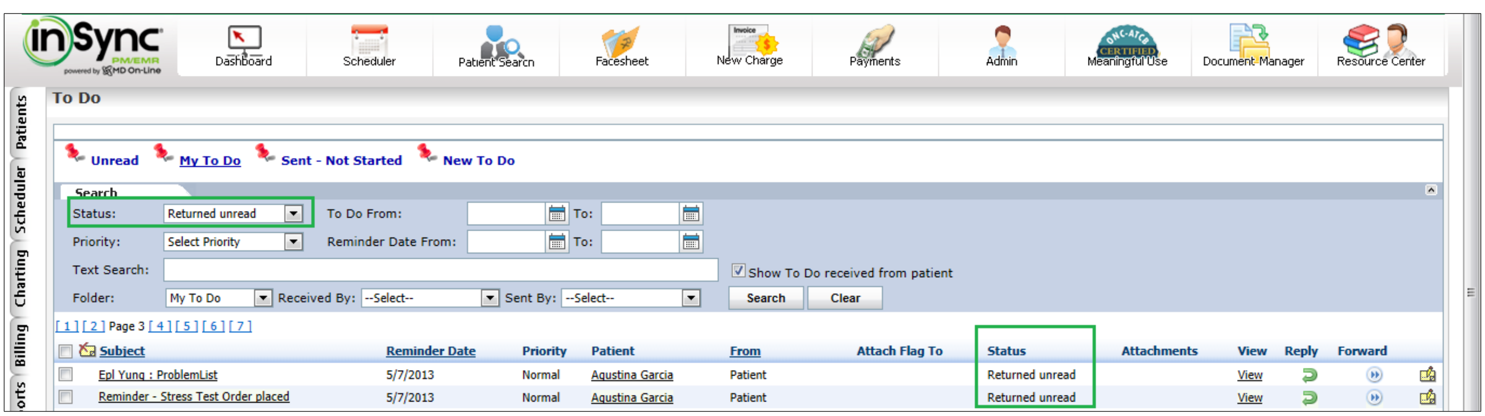
Figure 4: Configuring Notification for Unread Messages



<u>To view patient portal user's unread messages:</u>

- On the Dashboard page, click My To Do.
- On the To Do page, select the *Returned unread* status.
- Click Search.
- A list of messages that were not read by the patient portal user will be displayed.

Figure 5: Filtering "Returned Unread" Messages



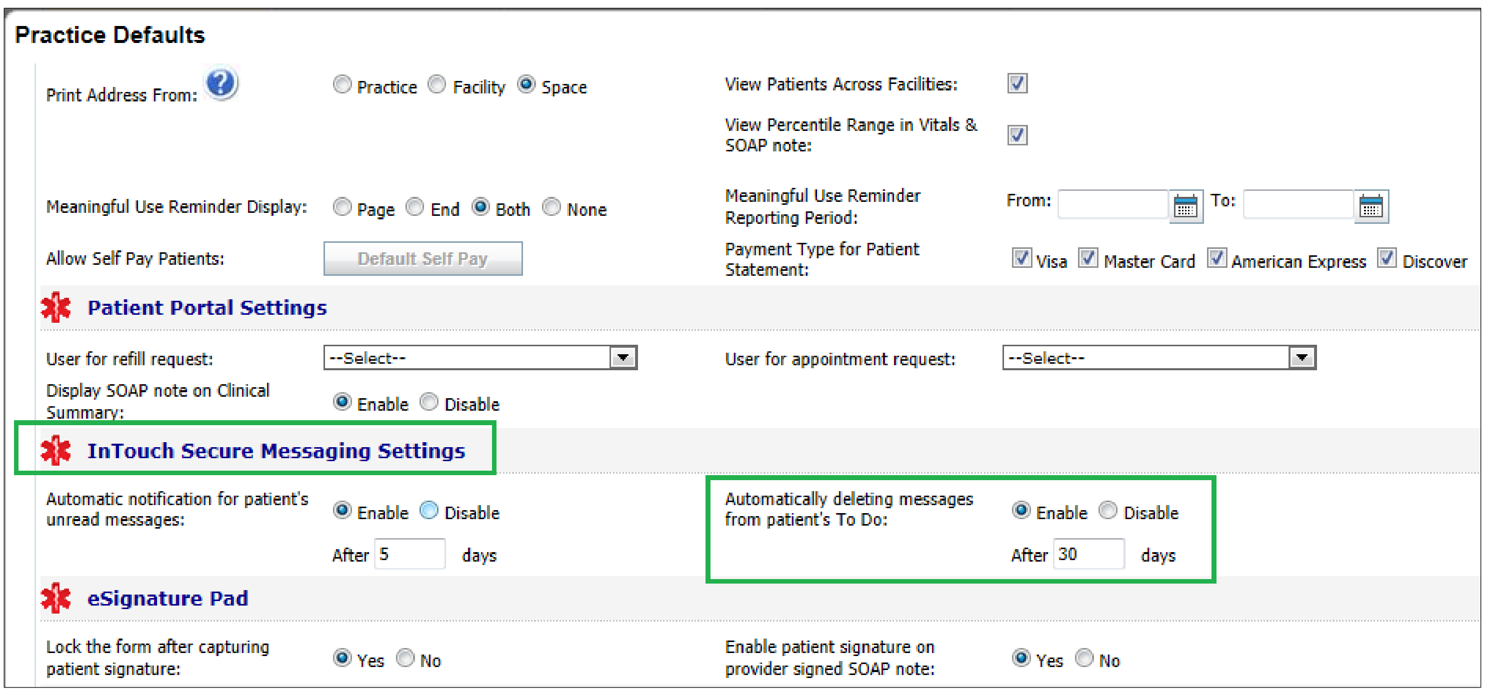
Configuring Automatic Deletion for Reviewed Messages

All the messages lying in the patient portal user's inbox should be deleted over a period of time. The system facilitates the practice admin user to configure a specific number of days after which the messages will be automatically deleted from the patient portal user's inbox.

To configure notification for deleting messages:

- Select Administration > Practice Management.
- Click the Practice Defaults link.
- Expand the InTouch Secure Messaging Settings panel.
- In the *Automatically deleting messages from patient's To Do* section, select *Enable*.
- Enter a specific number of days after which you want to delete the messages from patient portal user's inbox.
- Click *Save*.

Figure 6: Configuring Notification for Deleting Messages



Stopped E-mailing Password to Patient Portal Users

Instead of e-mailing a password to the patient portal user, now the system will produce the instructions that can be printed and communicated to the patient. Using these instructions, the patient portal user can change the password with a new password as desired.

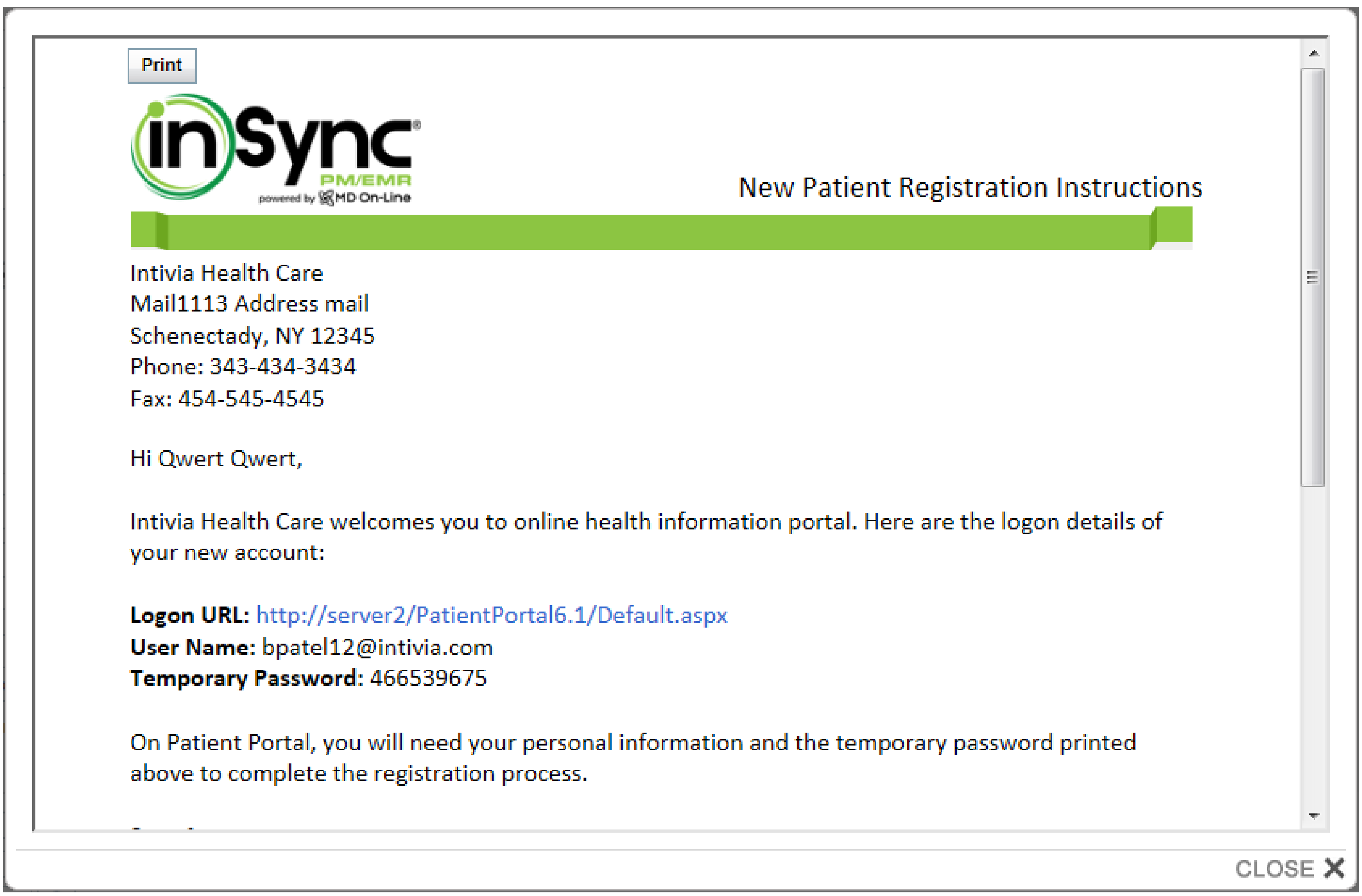
PRINTING INSTRUCTIONS TO USE PATIENT PORTAL LOG-IN

When you add a patient into the system, there is a provision to allow log-in for the patient portal user. At the time of allowing patient portal log-in, you will be asked to print the instructions, which you can communicate to the patient.

To print the instructions to use patient portal login:

- Login with the InSync user.
- Add or edit the patient record.
- On the Primary Address page, select the Allowed Login check box.
- Click Save.
    - The screen appears with instructions on how to use the patient portal log-in.
    - Click Print.

Figure 7: Printing Log-in Instructions



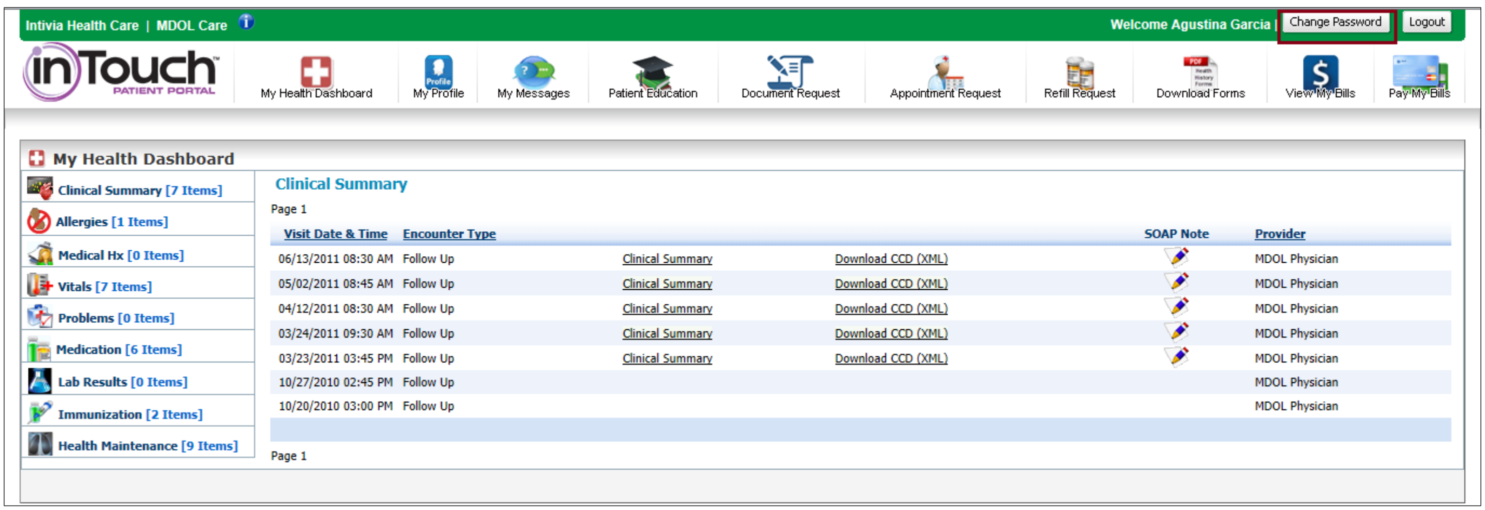
CHANGING A PASSWORD

Once the practice user prints the instructions to use the patient portal log-in and communicates the information to the patient portal users, they can change the temporary password with a new one as desired.

To change the patient portal log-in password:

- On the patient portal log-in, the system will be prompted to change the temporary password.
- After successfully changing the temporary password, the user will be allowed to use patient portal.
- The patient portal user can also change the password after the log-in.
- Locate the *Change Password* button on top right corner.

Figure 8: Changing Patient Portal User Password



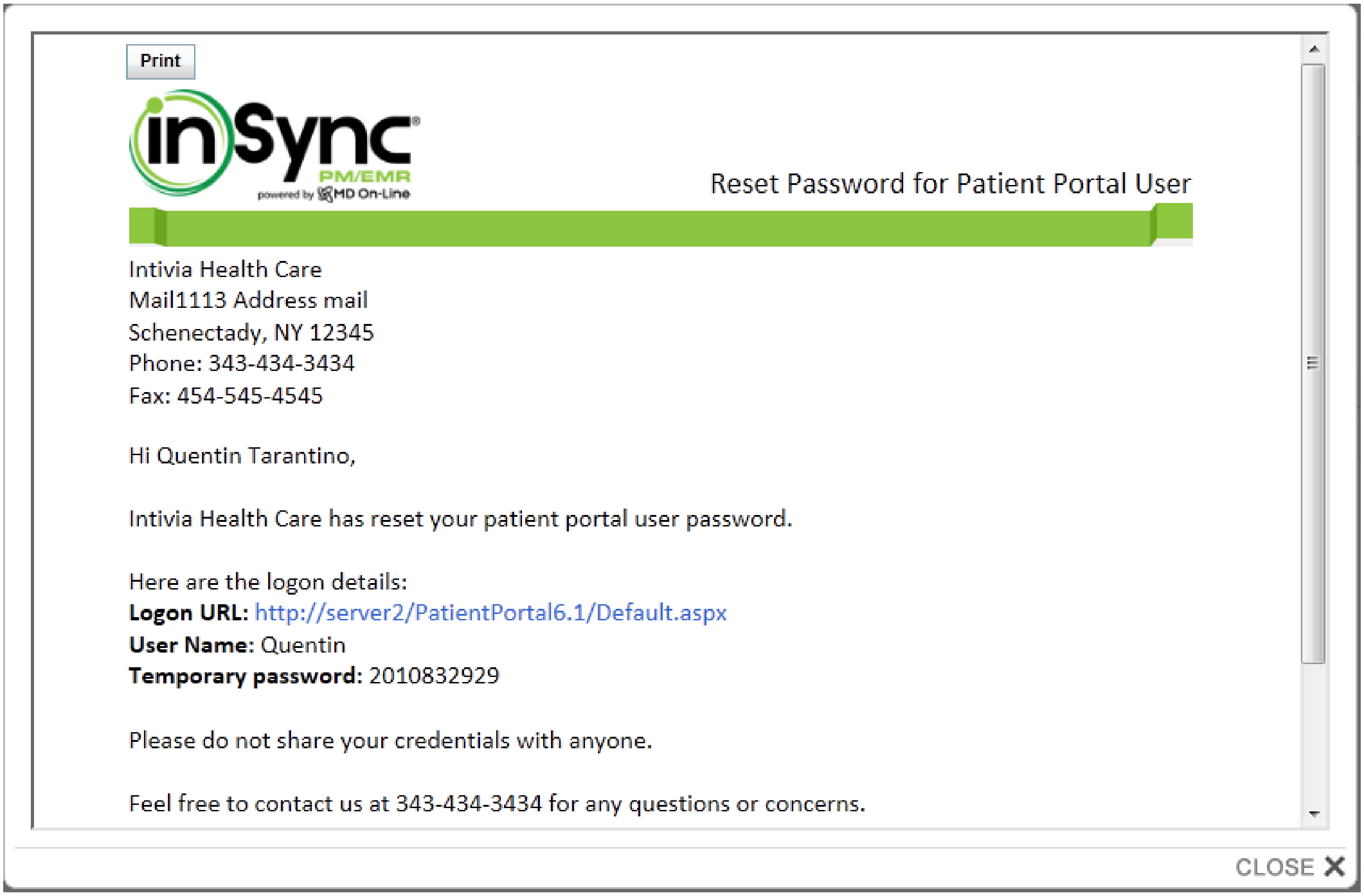
RESETTING A PASSWORD

The practice user can reset the password for a patient portal user. On resetting the password, the system will automatically generate a temporary password. The practice user can communicate this temporary password to the patient portal user. Please note that the e-mail will not be transmitted to the patient portal user when resetting the password.

To reset the patient portal user password:

- Log in with the InSync user.
- Edit the patient record.
- On the Primary Address page, click the Reset Password button.
- The screen appears with new temporary password. Alternatively, an e-mail is sent to the patient portal user informing him/her about password reset (password will not be sent in e-mail).
- Click Print.

Figure 9: Resetting Patient Portal User Password



Minor Changes in Charting

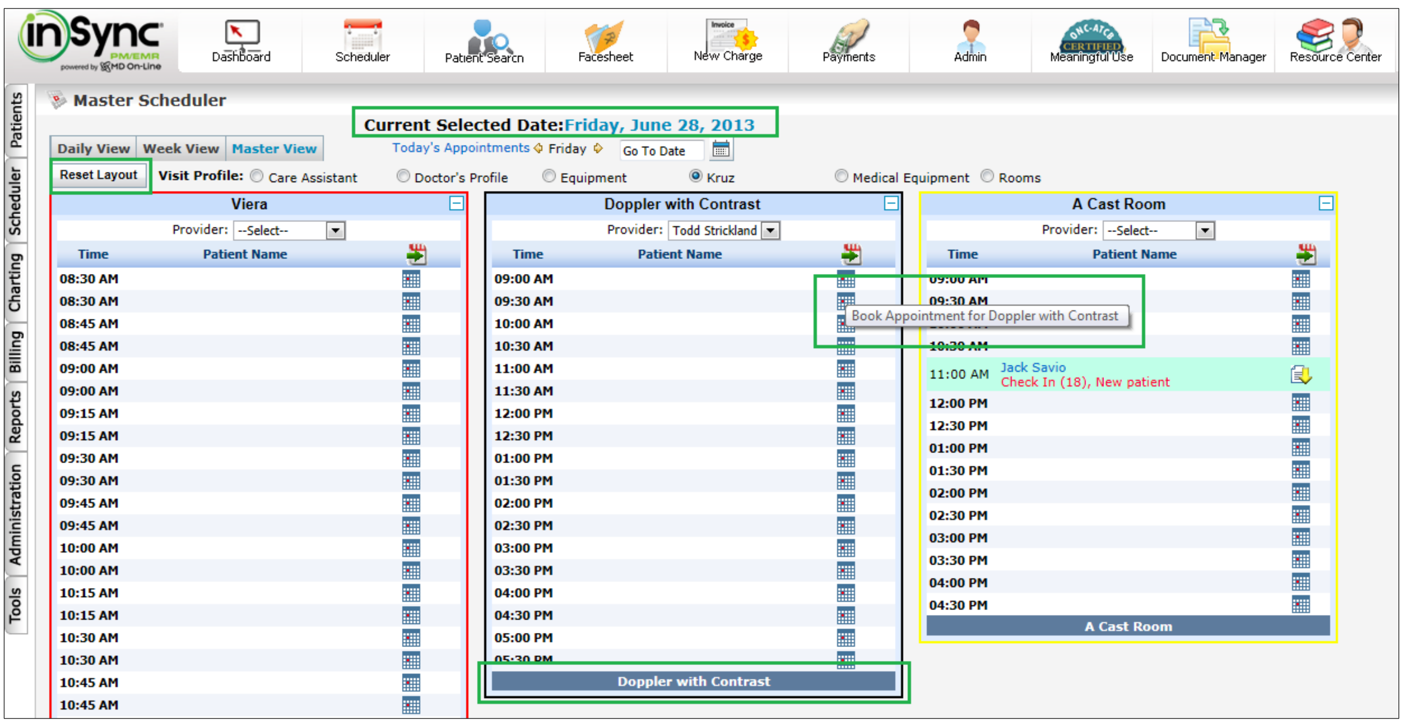
This section includes changes implemented in the Charting module.

Enhanced Master View in Scheduler

The Master Scheduler screen is enhanced with the minor changes which are described below:

- Introduced the border color to differentiate schedulers from one another.
- Reset Layout button is shifted to top left corner.
- Current Selected Date is shifted to center on top.
- Visit Profile caption is also displayed in the footer on the Master Scheduler.

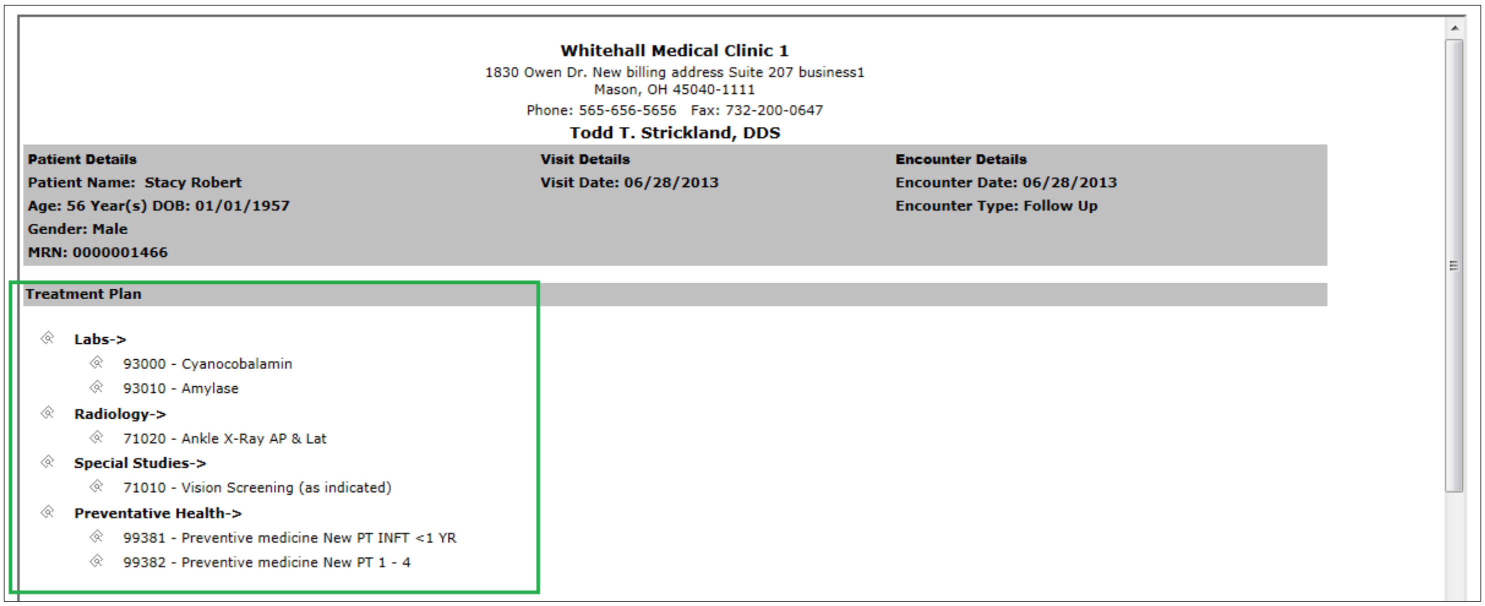
Figure 10: Enhanced Master View in Scheduler



PRINTED CPT CODE ON THE SOAP NOTE

The system is enhanced to print the CPT code in the Treatment Plan section on the SOAP Note.

Figure 11: Printed CPT Code on SOAP Note



Whitehall Medical Clinic 1
1830 Owen Dr. New billing address Suite 207 business1
Mason, OH 45040-1111
Phone: 565-656-5656 Fax: 732-200-0647
Todd T. Strickland, DDS

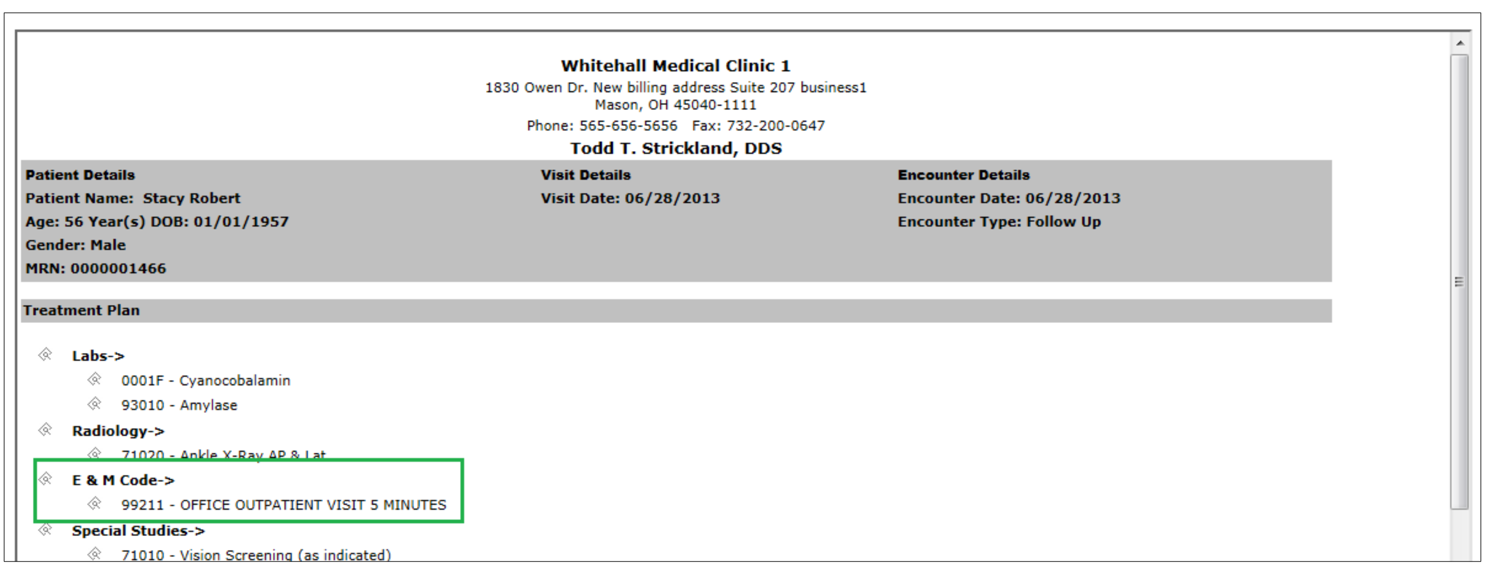
Patient Details	Visit Details	Encounter Details
Patient Name: Stacy Robert	Visit Date: 06/28/2013	Encounter Date: 06/28/2013
Age: 56 Year(s) DOB: 01/01/1957		Encounter Type: Follow Up
Gender: Male		
MRN: 0000001466		

Treatment Plan

- **Labs->**
  - 93000 - Cyanocobalamin
  - 93010 - Amylase
- **Radiology->**
  - 71020 - Ankle X-Ray AP & Lat
- **Special Studies->**
  - 71010 - Vision Screening (as indicated)
- **Preventative Health->**
  - 99381 - Preventive medicine New PT INFT <1 YR
  - 99382 - Preventive medicine New PT 1 - 4

PRINTED E&M CALCULATED CPT ON THE SOAP NOTE

The system is enhanced to display the CPT code in the Treatment Plan section on the SOAP Note that is derived from the E&M calculator.



Whitehall Medical Clinic 1
1830 Owen Dr. New billing address Suite 207 business1
Mason, OH 45040-1111
Phone: 565-656-5656 Fax: 732-200-0647
Todd T. Strickland, DDS

Patient Details	Visit Details	Encounter Details
Patient Name: Stacy Robert	Visit Date: 06/28/2013	Encounter Date: 06/28/2013
Age: 56 Year(s) DOB: 01/01/1957		Encounter Type: Follow Up
Gender: Male		
MRN: 0000001466		

Treatment Plan

- **Labs->**
  - 0001F - Cyanocobalamin
  - 93010 - Amylase
- **Radiology->**
  - 71020 - Ankle X-Ray AP & Lat
- **E & M Code->**
  - 99211 - OFFICE OUTPATIENT VISIT 5 MINUTES
- **Special Studies->**
  - 71010 - Vision Screening (as indicated)

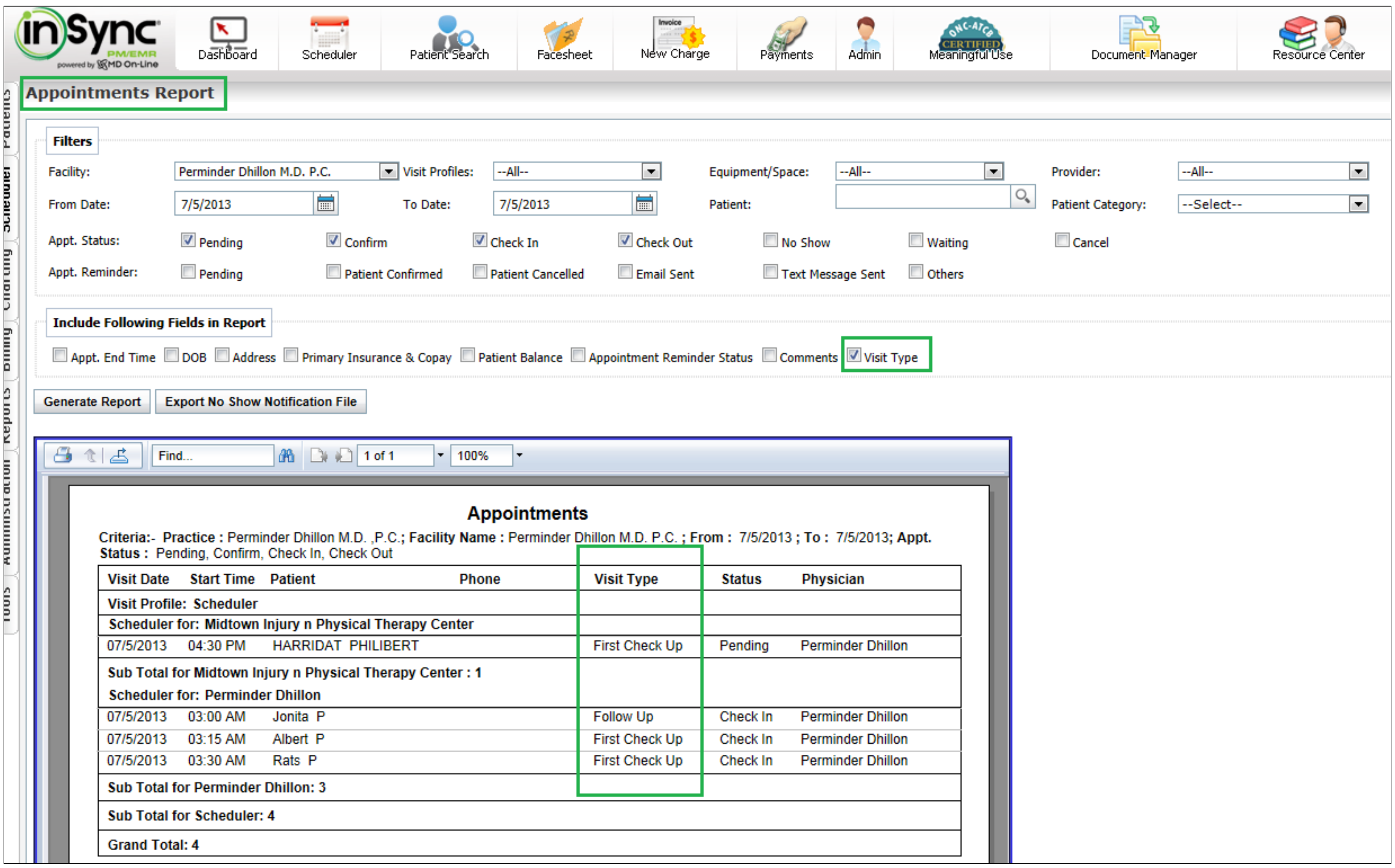
DISPLAYING "VISIT TYPE" ON THE APPOINTMENTS REPORT

Now you can view the Visit Type field on the Appointments Report.

To view the Visit Type on the Appointments Report:

- Select Reports > Appointments Report.
- Select the Visit Type check box.
- Select the other details to filter the report.
- Click Generate Report

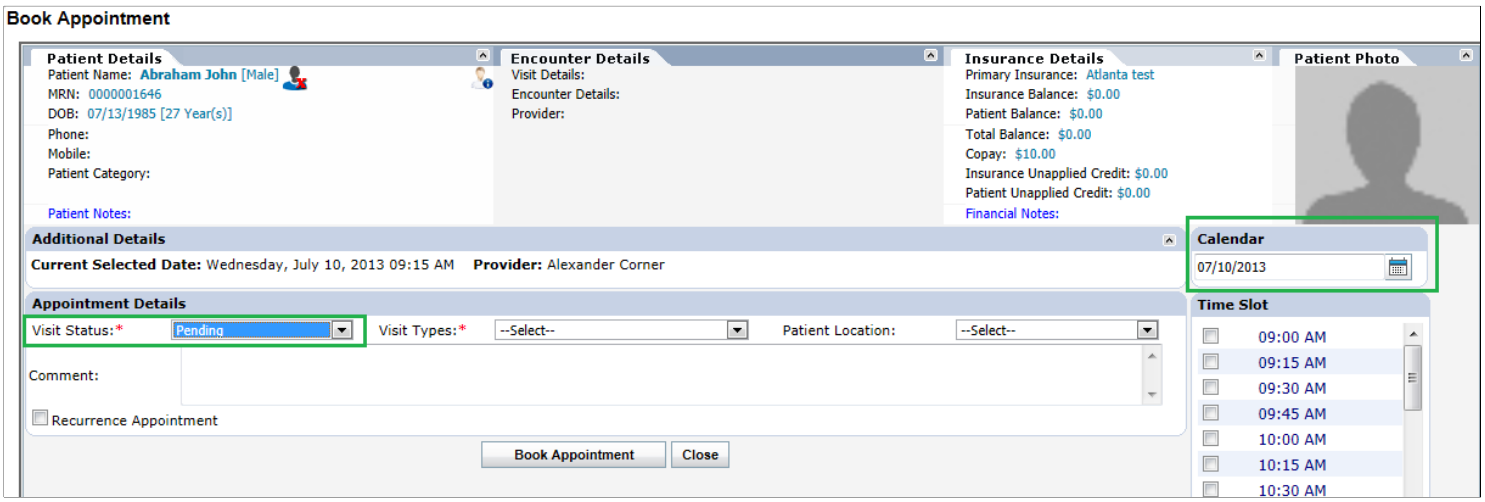
Figure 12: Displaying Visit Type on the Appointments Report



Displaying Visit Status as Pending By Default for Future Appointments

When you book a future appointment, the Visit Status will be displayed as Pending by default. You can change the status as desired.

Figure 13: Displaying Visit Type on the Appointments Report



CHANGES IN BILLING

This section includes changes implemented in the Billing module.

ARRANGING CPT, MODIFIER, AND DIAGNOSIS CODE SEQUENCE IN SUPERBILL INTEGRATION

Superbill now maintains a sequence of selection for CPT, Modifier, and Diagnosis made by the user. This sequence will later be displayed on the Superbill Integration pop-up screen where the user can reorder the sequence as desired. The updated sequence on the Superbill Integration screen will then be displayed on the New Charge screen.

Perform the following steps to set the sequence of CPT Codes, Modifier Codes, and Diagnosis Pointers when imported from Superbill and/or Encounter to the New Charge screen:

1. Create a superbill using the Superbill icon from the Scheduler. Additionally, you can also map the CPT, Modifier, and Diagnosis codes in the encounter through Facesheet.
2. On the Superbill screen, select the CPT, Modifier, and Diagnosis Codes to create a new charge.

   Note: *The sequence in which you select the codes on Superbill will appear on the Integration screen; however, you can also reorder the sequence from the Integration screen.*

3. Click *Save* and then click *Go To Charge Capture*.
4. The Integration screen appears displaying the CPT, Modifier, and Diagnosis codes in the order you selected them on the Superbill screen.

   Note: *In the case of importing codes from both Encounter and Superbill, the Integration screen will display the codes in the order they were selected in Encounter and Superbill, respectively.*

6. On the Integration screen, select the "Select to reorder code sequence" check box to reorder the desired code sequence and do the following:
   a. **Reordering CPTs:** Use the arrow keys (and) to reorder the CPT code in the sequence you want them to appear in the line item on the New Charge screen.
   b. **Reordering Modifiers:** Select the check boxes in the sequence you want them to appear in the line item on the New Charge screen.
   c. **Reordering Diagnosis Codes and Diagnosis Pointers:**
      i. Use the arrow keys (and) to reorder the Diagnosis codes in the sequence you want them to appear on the New Charge screen.
      ii. Select the check boxes in the sequence you want the diagnosis pointers to appear in the line item on the New Charge screen.
7. Click Import Service(s).

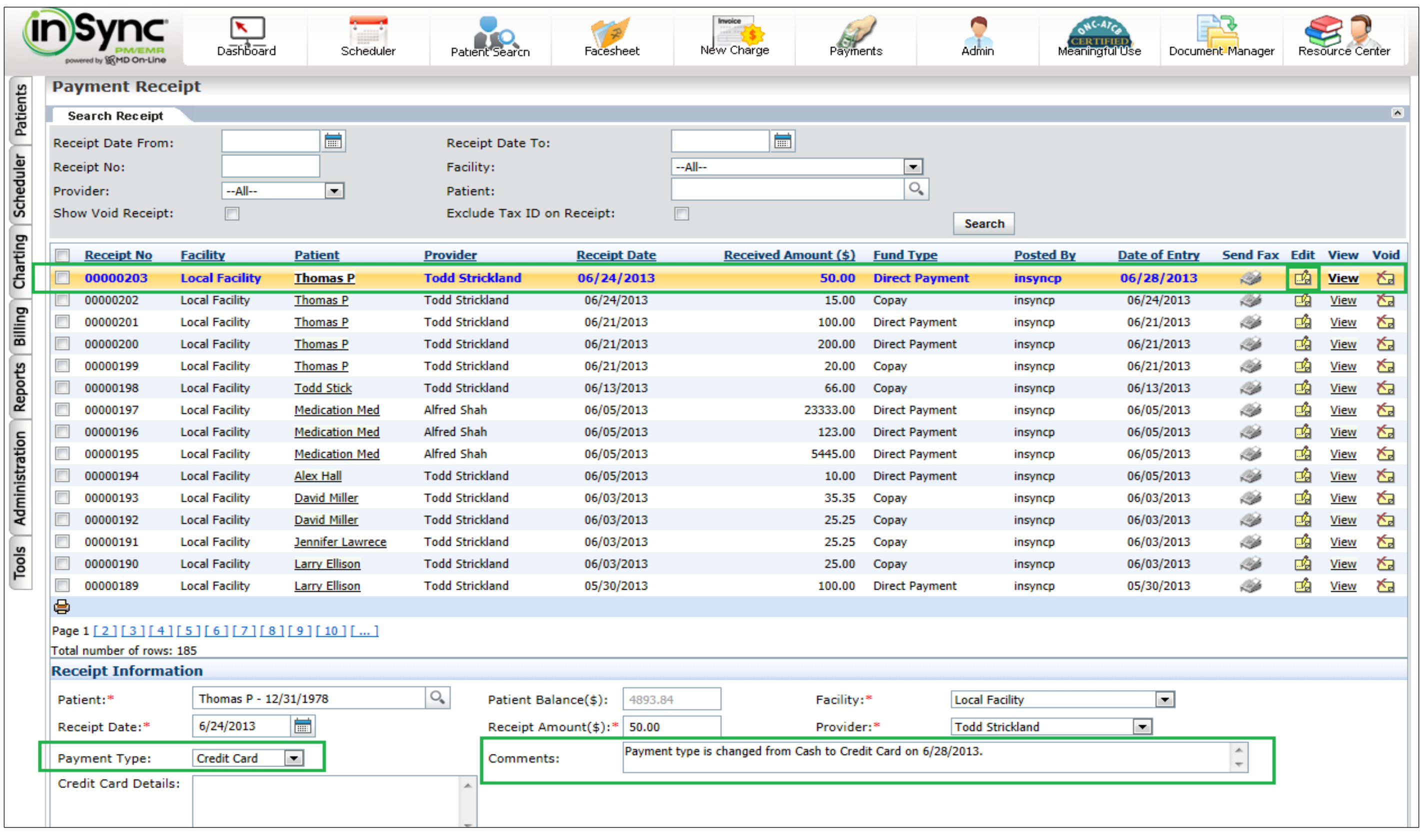
DISPLAYING A NOTIFICATION ON CHANGING THE PAYMENT TYPE

On the Payment Receipt screen, when you change the payment type option, the system captures this event and displays a notification in the Comments box the next time you update the payment receipt. This gives you an indication that the payment type option was changed in the past.

<u>To view the notification on updating payment type option:</u>

- Select Billing > Payment Receipt.
- Click Edit Record icon to update the payment type.
- Change Payment Type option from *Cash* to *Credit Card*.
- Click *Save*.
- Again open the same receipt using Edit Record icon.
- A notification is displayed in the Comments box with the date you changed the payment type option.

Figure 14: Viewing Notification on Updating Payment Type



Automatically Populating Diagnosis Pointers on New Charge

When creating a charge, instead of typing the diagnosis pointers, you can automatically populate them in the line items.

<u>To automatically populate diagnosis pointer(s):</u>

- Select Billing > New Charge.
- Enter the patient information.
- In the Diagnosis Codes section, enter the diagnosis code(s).
- In the Line Item Details section, enter all the CPT codes one by one and then click *Diagnosis Pointers* link.
- The diagnosis pointers will be automatically entered for all the CPTs. Change the sequence as desired.

  Note: *The system will skip auto-populating diagnosis pointers if they are already entered by the user.*

Figure 15: Automatically Populating Diagnosis Pointers