TIERED ROLLOUT IN THREE RELEASE PERIODS

FEBRUARY 6, 15, 22

WINTER 2024 OPERATIONAL AGILITY WITH HIGHER PERFORMANCE BILLING.

Enforced Inactivity Lockout

eRemittance Review & Details

Classic Chart Sunset & System Settings Updates

ePrescribing Compliance Updates

Patient Upload Documents

9-1-1 Notice in Patient Portal

PRACTICE MANAGEMENT

Enforced Inactivity Lockout
For security reasons, some external windows will now close automatically when you close our practice management, log out or your session times out. Included screens are Survey Sender, Rooming Dashboard, Report Center, ICD Crosswalk, Messaging History, Credit Card on File, Undisbursed Credit Card Payments, Credit Card Capture. You can also see the Release Guide for more information.

eRemittance Review & Details
We redesigned the eRemittance review and details screens in our eRemittance Advice for a more streamlined and efficient experience. You can search, review, and post multiple payments faster. You can also do an ad hoc search of ERA-related filters or save a search to run continuously. Navigate and post faster by drilling down to what is relevant and post payments based on results.

Mass Write-off
It's now easier to write off multiple charges across multiple accounts. Write off multiple open visits or charges with fewer clicks and in just a few seconds. Update collections account notes at the same time. Search for open charges assigned to patients or insurance using 15 dynamic filters. You can also add a collections action and note in the process of doing the mass write-off. For example, you can write off balances under $10 or all insurance balances more than 120 days old.

Exclude Unapproved Charges on CCOF Worklists
A new system setting lets you to choose if approved charges are included in the credit-card-on-file (CCOF) worklist. Excluding charges for unapproved visits helps you increase clarity and accuracy in reporting on outstanding patient balances.

Restrict Scheduling of Patients with a Collections Status
Our new user-level permission controls who is allowed to create appointments for patients in collections. Defaulted to Admins, this new feature blocks users without the permission from bypassing the collection warning when creating an appointment for an account in collections. Authorized users continue to get warned that the account is in collections, but you now can make an appointment.

Automated CCOF Worklists in AdvancedMD Pay
Credit Card Processing and Declined Payments are two new worklists that let you easily manage credit-card-on-file (CCOF) payments and follow-up to simplify the patient payment process with ideal workflow. Patients find it easy to set up and manage payment plans using our CCOF. We've made it easier to manage expiring cards, work declined payments, track contact attempts, and schedule follow-up calls. Prioritized tasks can now be assigned to staff for more efficient administrative workflow. Automation lets you repeat many of the workflow processes automatically.

Document Scanning Security Upgrade
To increase security and compatibility, we have upgraded our document scanning feature to the latest version of Dynamsoft (version 18.3). This plugin can be easily installed by your administrative contact. When you launch our document scanning feature, you will be prompted to install the new version. This happens the first time you launch the feature.

Process Capitated Write-off with the Automation Center
Our Automation Center lets you complete the capitated write-off process with time-saving automation processes when closing out your day.

Cardholder Name & Street Address in AdvancedMD Pay
We are improving the documentation process for chargeback disputes and to reduce online credit card fraud. You now save cardholder names and addresses when adding credit card on file (CCOF) to AdvancedMD Pay and our patient portal. This information provides proof of transaction ownership and is now required at all places a payment card can be saved. This includes from the transaction entry screen, Quick Pay, and the responsible party demographic tab.

Practice Management Beta

Automated Cancel/No-show Charge & Note
Select one or more configurable charge codes to access a payment for a no-show or canceled visit in our scheduler. Charge codes and fees can be added and for specific no-show reasons, which can be automatically added to a visit if a patient no-shows. This new feature gives you better tracking of no-show visits and late cancellations and allows you to collect fees more accurately and efficiently.

EDI Enrollment Tracker
We have consolidated how EDI enrollments are stored and managed. You can now view the up-to-date status of EDI enrollment for claims, remittance, claims status, or eligibility. Quickly search details of any historical or completed agreement.

Time Zone Enhancements in the Scheduler
We are making it easier to schedule patients who reside in time zones different than yours. Providers and patients in different time zones will be able to see appointments based on their local time across all AdvancedMD technologies. These enhancements in both our practice management and patient engagement suites makes it easy to set and manage appointments based on varied time zones of your practice, providers, and patients.

Practice Management
We added a time zone dropdown menu in the Provider list view to change the time zone.

Patient Engagement Enhancements
By setting the individual patient time zones that differ from the practice time zone in Patient Messaging, you get additional time zone enhancements in our Scheduler. The appointment time will display in the patient's time zone. Our make/edit appointment screen will show the patient's local time zone. Hover over an appointment to see the appointment card which displays the time based on patient's time zone.

ELECTRONIC HEALTH RECORDS

Classic Chart Sunset & System Settings Updates
Our legacy or classic chart view is being sunset, and our patient chart view (card framework) is the only view option. We are removing the 'Back to Classic' toggle. You can see and manage all updated user preferences related to our patient card chart layout. When you update a role, all changes are pushed automatically to assigned users with that user preference. User preference pages are updated to the more streamlined and modern look and feel of our practice management, with all preferences related only to the classic chart removed.

ePrescribing Compliance Updates
A new ePA donut lets you see all prior authorization requests. We are sunsetting the NADEAN field in the practice management. The medication form has been updated to improve and streamline workflow.

- Remove Prescription Type field and table from forms.
- Added Last Office Visit date field to medication form and renewal requests.
- Removed checkboxes on medication form (Hold and Assistant).
- Moved checkboxes to the top of the form (Substitutions Allowed and Record Only).
- New prescription details field with checkboxes is now a checkbox name and X icon (chips).

EHR Audit Tracker Redesign
You can now access a more user-friendly administrator audit. Our EHR admin audit page has been redesigned for better performance and a more user-friendly design, giving you better workflow productivity and faster report run times.

EHR Template Library & Filters
We have a new template library with a more user-friendly design and inline previews to save time opening external windows. You can filter by specialty and type. There's also a keyword search and inline template preview feature.

CQR Updates for MIPS Value Pathways
Report eCQM measures for an MVP which is a new, voluntary, reporting option for meeting your MIPS requirements and is less burdensome by requiring fewer reporting requirements. Each MVP includes a subset of Quality measures that are related to a specialty or condition to offer more meaningful participation in MIPS. MIPS Value Pathway reporting option allows practices to report as an individual clinician, group, or subgroup.

Filter Orders & Results by Facility
These dashboard worklists let you filter for orders and results by facility. Providers and others who work out of several facilities can now see their orders and results worklists by facility, allowing you to quickly narrow down outstanding orders and results for patients by facility. Easily identify which facility patients belong to while reviewing results and sending orders.

New Dashboard Refresh Cycle
We have improved the performance and responsiveness of our donut dashboard. Donut counts are cached to reduce calls to the database and increase overall performance. When the dashboard is accessed, counts are immediately updated if at least 15 minutes have passed since the last refresh cycle. You can manually refresh data counts at any time using the refresh icon. We added a new indicator to inform you that counts are updated every 15 minutes.

Calculate EHR Chargeslip Units Based on Duration & Charge Code
You can now flag a charge code to automatically calculate units billed based on the duration of the visit while creating an EHR chargeslip. A new setting flags a charge code to calculate units using the duration entered inside the patient note when creating a linked chargeslip. This helps you capture the duration without manually calculating units. Appropriate units are calculated and prepopulated in the chargeslip before you send charges to our billing system to process.

E/M Coder Enhancements
Our E/M Coder has been updated for consultation, home visits, and Medicare prolonged face-to-face visits. This enhancement expands the codes available to use in the E/M Coder for both new and established patients.

Electronic Health Records Beta

Electronic Case Reporting
eCR lets you send patient case reports from our EHR directly to state public health agencies. eCR eliminates manual reporting on healthcare providers and is the automated, real-time exchange of case report information between AdvancedMD and state and federal public health agencies. You get faster, more complete data than manual reporting, including patient and clinical data on demographics, immunizations, and other treatments. eCR is a requirement for providers participating in the CMS QPP Promoting Interoperability category. eCR runs automatically behind the scenes in our EHR to capture and report required information.

Patient Engagement

Patient Upload Documents
We have improved the efficiency of patient-provider interactions and clinical workflow by giving patients more flexibility in securely submitting documents from online scheduling and intake forms. ‘Other Documents’ includes financial and administrative documents which can be uploaded to chart files. ‘Medical Documents’ can be uploaded to the EHR. You can view each in the EHR document worklist. An option in System Settings lets you control patient uploading permissions for each document type.

Credit Card on File in Patient Portal
AdvancedMD Pay users can now have patients manage and add credit cards on file (CCOF) in the new ‘My Cards’ section of our patient portal billing. Patients can ensure they have an updated CCOF with your practice for monthly patient billing and self-service payments. A patient balance is no longer required to allow patients to add a CCOF.

9-1-1 Notice in Patient Portal
A 9-1-1 alert now warns patients to not send a message through your patient portal to request emergency assistance. This message is displayed on top when a patient is composing a message to make sure any emergency communication is done by calling the office directly or 9-1-1 as portal messages are not monitored in real time.

Double Booking Management in Provider Matching
In Provider Matching you can manage how (and if) you double book with the ‘Use Column Constraints’ in System Settings. You can easily see your schedule when double booking for increased productivity.

Zoom-based Telehealth Migration
We’re happy to announce that our new Telehealth update is now available. Clients using our legacy telemedicine can now request to move to the new and improved Zoom-based telehealth. This upgrade offers an improved audio and video experience as well as all the enhanced features of Zoom. You can schedule group appointments, streamline workflow in the provider list view, option for text for the meetings links, and receive real-time updates to patient data (including copays).

Patient Engagement Beta

Telehealth Check-in & Verification

Patient File Upload Worklist
This new worklist lets you view insurance cards uploaded by patients through the telehealth check-in process, patient portal, and online self-scheduling.

Flat Rate Setting for Appointment Types
Specify a flat rate amount for telehealth payments at the appointment type level in the Appointment Types (System Setting).

Telehealth Check-in and Verification
There is now a frequency setting that can be applied to manage requests that are presented to patients during the telehealth intake process.

Mobile Clinical App

Care Team Card
To help you achieve better care coordination and patient health outcomes, we are introducing the Care Team card to our clinical app. This provides visibility and allows you to manage the team associated with the care of your patients. We also offer tools to control access to patient clinical data or limit patient self-scheduling based on the care team.

Push Notifications
Our clinical app now pushes notifications for important tasks, even while you’re away from the office. These notifications are pushed in real time and greatly help you act on time-sensitive tasks such as medication refill requests and patient portal messages. Notifications to your phone or iPad help you stay connected to your practice and patients throughout the day (and night).

AdvancedMD