



TIERED ROLLOUT IN THREE RELEASE PERIODS
JUNE 11, 20 & 27

2024 SUMMER RELEASE FEATURES

PARTNERS IN SUCCESS DRIVING
PRODUCTIVITY GAINS.

PRACTICE MANAGEMENT

AdvancedMD Pay – Certified PAX A920 Terminal

You can now perform card-present transactions in AdvancedMD Pay using our PAX A920 terminal.

AdvancedMD Pay – Process Payment Plans with Credit Card on File

You can now use payment plans and process a credit card on file (CCOF) payment through our Patient Billing Wizard (PBW). You will only be charged the monthly agreed upon amount for your payment plan, not the total patient balance. The PBW successfully processes the agreed upon amount once per calendar month.

AdvancedMD Pay – Capture & Disburse Virtual Insurance Credit Cards

You can now process insurance virtual credit card (VCC) payments smoothly and easily with AdvancedMD Pay. You can process a VCC that from an insurance company in Payment Entry. The entire VCC amount processes in a single transaction. EOB lets you to distribute the payment to many patients and keep track of where they left off and how much of the total VCC payment is remaining.

Application Services with Provider Add

With this new functionality, users who have access to the Provider System setting can now add your new provider right into AdvancedMD, which will start a process to get you that provider usable in your office key as quickly as possible. You can also now manage these requests if you are a purchasing admin in a new module called Application Services found inside AdvancedMD.

Carrier Update Tool

To update a group of carriers, you no longer need to update one at a time. Our carrier settings lets you update more than one carrier at a time, making mass updates very easy and fast.

Scheduler – Automated Cancel/No-show Charge & Note

If you would like to collect more money on no-show and late-cancellation visits, you can add charge codes and set the charge amount to automatically apply to a no-show. Having multiple charges with different charge amounts gives you flexibility to change a no-show fee at the time of cancelling the visit. You can easily track patients who no-show or cancel frequently and have an adjustable amount to charge. This helps you close the documentation tracking loop by adding a note and a charge slip to our EHR.

Mass Write-off – Perform Partial Write-off

Our Mass Write-off feature lets you perform a partial write-off. You can write-off a specified amount or write off everything except a specific amount.

Fee Schedule Import – Exclude Missing CPT Codes

We've enhanced our Fee Schedule Import tool so when you try to import a file containing CPT codes that don't exist in your office key, you get a warning rather than an error which would have prevented you from importing anything at all. These warnings save time from manually removing missing codes, as you can now complete the import with all other fees from the file belonging to CPT codes in use.

View Additional Eligibility Details, Redesigned Screen

Quickly access Plan, PCP, Copayment, Deductible, Co-Insurance, Active Coverage, Limitations, Out of Pocket, Coverage Basis, and Contact Following Entity Info with anchor tags. You can also see active benefits and mental health information from your payor.

Exclusions Tab – Updated Exclusions Information Screen

We have increased security and compatibility to our Exclusions Information screen. Carrier details are more intuitive. Security risks have been reduced and workflow is better with new shortcut keys to access patient, carrier code, CPID, carrier name, carrier phone details, print all, and print expanded and close.

Rebill Claims – Add Resubmission Code

The extra info/resubmission code field has been moved forward in your workflow so you can enter information when creating a single claim rebill or a mass rebill. Adding this field to the rebill screen saves time and hassle, as you no longer need to go into 'extra info' on each claim when rebilling with a submission code.

ERA Center – Increased Number of Displayed Visits on Check

We have enhanced our ERA Center to display up to 8,000 visits within a check. This reduces the number of checks and provides a more efficient payment posting experience. With fewer check splits, you can now search, review, and post payments faster. This feature is especially helpful for laboratory practices with 5,000 visit counts within a check.

Promoting Interoperability (PI/MIPS) Reports – 2024

We have updated the Promoting Interoperability Detail and Summary reports to comply with the latest annual regulatory updates. The title of the reports now includes the year 2024.

Rebrand of AdvancedInsight to Analytics

The tool formerly known as AdvancedInsight has been renamed "Analytics" and this change should be reflected in our software and invoice. No workflow changes.

PRACTICE MANAGEMENT BETA RELEASE FEATURES

Claims – Same-day Rollup

Our Claims Same Day Rollup feature lets you rollup patient visits from multiple providers on a single day into a single claim. Specialty billing tools have been added for practices that work with case management. Now you can automatically rollup visits for a patient on a single day across different providers, based on CPT codes, charge code categories, or carriers.

ELECTRONIC HEALTH RECORDS

ePrescribing Updates

A variety of enhancements have been made to the ePrescribing feature based on client feedback to improve your workflow and productivity.

- We updated the eSend status screen with enhanced filtering and sorting.
- Search for a pharmacy by address and see the NCPDPID.
- Add annotations for pharmacies.
- Drug Lookup and Drug Security screens showcase an updated look.
- Switch the view in the timeline from linked view to date view.
- See the NDC and manufacturer information for drugs in drug search.
- New annotations icon appears for annotations added to prescriptions.
- DEA badge and pharmacy name appear in the Prescriptions Donut.
- Use new Global Setting to require a diagnosis on prescriptions prior to eSending.
- Filter the Medications Card for current and historic prescription status and set a favorite view as a filter.
- Medications can now be searched by name.
- The prescribers list now shows only those who can eSend when writing a prescription.

ePrescribing – Pharmacy Screen Updates

Increase efficiency during the ePrescribing process. You can view the address and NCPDPID and search on both in the pharmacy search. When searching for a pharmacy, you can search on the pharmacy address or the NCPDP ID of the pharmacy. You can add an annotation or specific note to a pharmacy for your practice's internal use.

Review & Evaluate Medication Adherence

You can review dispensed medications by the pharmacy and evaluate medication adherence. This feature lets you more easily evaluate data on patients who are non-compliant and provides details from the pharmacy. With the RxFill details you can see if patients received full or partially filled prescriptions and the reason.

Chart Timeline Date View

You can now view patient chart items in the timeline based on the created date. You can organize your chart items chronologically instead of by linked status. Medication refills display on the date they were approved for better visibility.

Global Settings Updates

Global Settings are updated to a more streamlined and modern look and feel. A new menu of settings organized by type makes finding and managing EHR settings for your practice easier.

Electronic Case Reporting

Send patient case reports from our EHR to your state public health agency automatically without disrupting the clinical workflow. Electronic case reporting (eCR) eliminates the burden of manual reporting. You get faster and more complete data, including patient and clinical data on demographics, comorbidities, immunizations, medications, and other treatments. eCR provides timely and more complete data than manual reporting and decreases the burden on healthcare practices as it securely transfers patient and clinical information. eCR supports the requirement to participate in MIPS Promoting Interoperability Performance Category for eligible clinicians.

Adjust Time Zone on EHR Scheduler Quick View

We have improved your provider-to-patient communication as well as reduced risk of providers missing upcoming appointments due to time zone confusion. Providers can adjust their dashboard schedule and see their appointments in their time zone. Patient appointments that are in a different time zone show the patient's local time. While viewing your schedule on the dashboard, you can adjust your time zone in a drop-down menu, so your upcoming appointments appear in your current or preferred time zone. Your time zone automatically adjusts based on the EHR Global Setting to the selected time zone on the dashboard. The appointment cards in the single-column schedule also highlight appointments for patients that are in a different time zone and show the local time of the patient for the appointment.

Added Annotations and Message Icons to Chart Folder View and Cards

Increase visibility and improve communication among clinical staff as you can now see annotations and messages associated with chart items. This new feature is available for Folder View and Patient Chart Cards. Folder View shows charge slip status and chart items that are active. There are also annotation and message icons. When toggling between Timeline to Folders View, you can see which chart items have annotations ("sticky notes") or messages associated with them.

Adjust Age Range in Growth Charts

Adjust growth chart information before printing or sharing data with parents. An adjustable age range bar lets you narrow the viewable age range. Target a timeframe and track growth progress for patients with detail and graphs. This feature is available within our Vitals card.

Added Status Column for Find Chart Item Screen

A new status column has been added to the Find Chart Item screen that lets you view and sort by status. It's now more efficient to view and manage chart items without opening chart items individually.

Clear All Checkboxes in Chart Print

We've made our Chart Print feature more efficient. You can uncheck all items with a single click. Checkboxes let you select only the chart items you want to include in your print.

Access CQR Module in EHR

Our Clinical Quality Reporting (CQR) can now be accessed from our EHR. Simply select Modules then Clinical Quality Reporting. A drop-down menu lets you access CQR within our practice management or EHR.

ELECTRONIC HEALTH RECORDS BETA FEATURE

Clinical Notes Autosave

Improve efficiency and prevent data loss as all updates made to clinical notes are saved automatically. Autosave helps you work smarter by eliminating worry about losing critical clinical documentation of the patient visit. While working in the note, updates are automatically saved eliminating multiple manual saves.

PATIENT ENGAGEMENT

Patient Portal: Updated Navigation Look and Feel

You and your patients can enjoy a more efficient and visually appealing experience with our patient portal. The new look includes improvements to the navigation. We've simplified how information is presented and the overall workflow. Performance is faster and more responsive, resulting in a smoother user interaction. The user experience includes appealing styles, colors, and modern design trends. Appointments, messages, and prescription screens are more visually appealing and professional.

Telehealth – Capture & Display Additional Subscriber Information

We've added additional automation to front-desk workflow to automatically prompt patients to complete missing information when adding insurance to their demographics. When uploading an insurance card image through our telehealth, patients can select the patient, responsible party, or 'other' to indicate who is the subscriber of the insurance policy.

Worklist Enhancements

Additional subscriber information now includes insurance card images in the Patient Upload worklist. It's easier to add a new insurance record. When a patient uploads an insurance card, a new drop-down menu will require the patient to select the subscriber/policy holder between patient, responsible party, and other.

MOBILE

Adjust Time on Scheduler Quick View

We have improved scheduling appointments across different time zones. We have added patient time to Scheduling Appointment card if your patient is in a different time zone than the provider. We added a dropdown menu so you can change the time zone you see in your schedule. These improvements reduce missed appointments from time zone confusion.