medisoft®

Medisoft Features Evolution Matrix

Insurance	v14	v15	v16	v17
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 that 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 (enhanced 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)			✓	✓
Changes Made to Comply with the ANSI X12 Version 5010 Standards for the Transmission of Specific Healthcare Transactions (see Release Notes for Complete Details)				✓
– New Windows or Tabs: EDI Note Tab on Edit Claim Window; EDI Notes List Window; EDI Note Window				✓
– Several Fields Moved and Windows Restructured to Accommodate Moved Fields				✓
– Several New Fields Added Throughout Medisoft				✓
– Option for UB-04 Condition Codes Moved to Main Lists Menu				✓
– Several Additional Options Added and Other Changes Made				✓
Revenue Management electronic remittance advice (ERA) processing updates to comply with ANSI-5010				✓
– Updates to the RelayHealth Implementation Guide (IG)				✓
– New Remittance Delivery Method (RDM) Elements Added to Loop 1000B				✓
– New Coverage Expiration Date (DTM) element added to explain that coverage was denied because the patient's coverage has expired				✓

Insurance (Continued)	v14	v15	v16	v17
– New Claim Received Date Elements (DTM) added in Loop 2100 so that they are recognized if they are received				✓
– Updates Made to the Claim Preview Report and Claim Details Report				✓
Revenue Management Enhancements (to reduce the number of clicks to perform certain tasks, and simplify the setup and configuration process)				✓

Accounting/Billing	v14	v15	v16	v17
Customized Aging Buckets	✓	✓	✓	✓
Withhold Code Type for Procedure Codes	✓	✓	✓	✓
Customizable HL7 Interfaces with EHR	✓	✓	✓	✓
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 Copay Tracking	✓	✓	✓	✓
Unprocessed Transactions (Holding Tank)	✓	✓	✓	✓
Global Days (surgical billing)	✓	✓	✓	✓
Billing for 8 Diagnosis Codes	✓	✓	✓	✓
Missed Copay 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		✓	✓	✓
Integration with BillFlash from NexTrust (automates the printing and mailing of patient statements)				✓

Electronic Health Record (EHR) Integration	v14	v15	v16	v17
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 v17 Client Server and Medisoft Clinical on One DVD (greatly reduces the number of screens that require user intervention)			✓	✓

Reporting	v14	v15	v16	v17
Facility Report	✓	✓	✓	✓
Quick Receipt and Quick Statement	✓	✓	✓	✓
Patient Collections Reports	✓	✓	✓	✓
Insurance Collections Reports	✓	✓	✓	✓
Unapplied Copayment 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		✓	✓	✓

Reporting (Continued)	v14	v15	v16	v17
Blank Appointment Indicator		✓	✓	✓
Print Blank Superbills		✓	✓	✓
Electronic Transaction Reporting (helps manage electronic transactions related to verifying insurance eligibility and submitting claims)				✓
Audit Reports (tracks reporting and exporting of data)				✓

Security/HIPAA	v14	v15	v16	v17
5 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	v14	v15	v16	v17
Set Default Data Fields	✓	✓	✓	✓
Customizable Tool Bar	✓	✓	✓	✓
Option to Display Subtotals	✓	✓	✓	✓
Customized Data Screens	✓	✓	✓	✓
Warning on Duplicate Patient	✓	✓	✓	✓
Auto Tab 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	✓	✓	✓	✓

Usability (Continued)	v14	v15	v16	v17
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 improve navigation)			✓	✓
DVD Install (reduces installation time)			✓	✓
Customizable Tool Bar in Office Hours			✓	✓

Special Features	v14	v15	v16	v17
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	✓	✓	✓	✓