If you have any ideas for, problems or frustrations with, or need training with the advanced features of the Program please contact **support@theramanager.com** or call 908-273-9410.

If you have never downloaded TheraManager, download the Trial from the website, or call 800-913-4294, if your original trial has expired. Our customers continue to convert from many other programs and we can make the switch easy for you with an import of your existing patient data.

What's New October 2005

General

- The big change for us this month is in the way in which the prescription scripts are generated, that gives us enhanced flexibility to meet the differing state requirements and formats. We have also added clinical/allergy notelets.

Booking Appointments

- It has been possible to open the **Booking Form** from the popup menu without having selected a time on the **Appointments Screen**. If this happened an 1899 date appeared. This possibility has been eliminated. The Book menu item will no longer appear unless a time was selected with a single click on the calendar before opening the menu..

Posting Appointments

- Dialog boxes now appear if you have not selected a billing option, **Forgive Copay Checkbox** is checked, or **Use Allowed Checkbox** is unchecked if the provider is in-network.
- If you use the database engine, the program takes advantage of transaction processing, This valuable feature is normally invisible to you, but if you are on a poor network connection for example and the posting transaction fails, nothing will be recorded in your database. We have split the transaction into two parts, one for the posting (including changing the color of the appointment) and one for recording the pay-at-the-time that will each give a message if the transaction fails. Transaction processing is used elsewhere in the program, for example when posting payments at the **Payments Screen.**

Prescriptions

- The method of creating scripts has been changed, which makes it much easier for us to customize scripts to meet the different state requirements.
- The new forms for NY and CA have been added. There are 2 new combo boxes, one for **Max Dose** and one for the **Code** to be required in NY state.
- If any of the new layouts have a problem for you, let us know and we will fix it immediately.

Prescriptions and EMR

- We have added a way of tracking your patients allergies and any informal clinical reminders. These will appear on the **Popup Notelets** and will be visible at the **EMR** or the **Prescription Screens**. Just like the Office Reminders that appear elsewhere in the program, if these notes are set for auto-hide, the note will automatically appear if there is any content.

Backup Cautions

- If the bars do not jump up and down for several seconds when doing a backup, you have not made a backup for whatever reason even if the program says that a backup was completed.
- You cannot do a second backup to the same place on the same day unless you first change the name of the first zip that was created.
- All users will need to be logged out for a complete backup. The program checks for this.
- Backups should be done on the server. They may not always work on a networked client.
- Backups do not appear to work if the IP address is used in the ads.ini file. This is the optimum method for a networked office. If the IP address of the server is used in the ads.ini file on the server, the backup does not appear to work even on the server.
- You can backup to a letter drive including a FLASH memory or a CD-RW formatted as a drive.
- Make sure that your storage medium medium has space available. you may not get a warning that it is full.
- You cannot backup directly onto a CD-R. To use a CD-R you need to backup to the c: drive and then write the zip onto the CD-R using your CD-writer software.
- What ever backup method you use make backups frequently. Always keep a backup off-site.
- To reduce the size of the backup file, you can do a clean-up periodically from the **Backup Form**.
- Always do a backup before installing an update.
- Check that you are making real backups.
- If you do not understand these issues, you will need to seek professional IT support.

What's New September 2005

General

- There are many small changes this month to accommodate individual preferences.
- For several reasons since last month, we have changed our recommended credit card merchant service. We have also made the signup and setup process very quick and easy. As part of the setup we will provide you with a free mini swipe USB card reader integrated into TheraManager for pay-at-the-time payments.

Credit Card Billing

- Our recommended merchant service is Century Bankcard Services, which has a low $5 monthly fee.
- There is, of course, a small cost associated with accepting credit cards, but the advantages are considerable: speedy deposits to your account, elimination of delinquent accounts, enhancing your business image, meeting your patients' expectations, seamless integration into TheraManager and using a secure internet connection rather than tying up an expensive phone line.
- For details about the modest charges associated with taking credit cards, and the very simple sign up and setup procedure, please request the information sheet from customerservice@theramanager.com.
- As mentioned above the setup will include a free mini swipe USB card reader.

Booking Appointments

- An option to turn off Fast Booking has been added. Use the **Disable Fast Booking** menu item on the popup menu. The state of this will be remembered as a user preference.
- The Wait List can now be filtered by provider, ie if a patient expresses a preference or needs a certain treatment, this can be indicated at the time the patient is added to the Wait List and the list viewed by the provider selected in the **Provider Titlebox**.
- The no-clash feature when booking appointments can now be turned off at **Tools | User Settings** ie a clinician can be booked to see 2 patients at the same time, but presumably

occupying different rooms, so the **View by Room** and **All** is the appropriate view to use. The red clash will still show until something else is clicked.

Posting Appointments

- When posting a patient's first appointment, a reminder dialog now appears if you have not selected a billing option.
- You now have the option to charge something other than the allowed amount even if you are in network. This is remembered for subsequent postings. Use the checkbox beside the **Allowed Label**.
- A related "Forgive Copay" option simply does not charge the patient the copayment.

Accounts and Batch Printing

- We have added an option on the popup menu that allows balances at the **Accounts | Patients Bills** to be designated as in collection. Bills will not be printed for these accounts at Batch Printing, although reprints can still be done.
- We have added the ability to multi-select and reprint individual bills, HCFAs or SoSs within a batch, which is useful if the printer fails part way through a large printing.

Payments

- The methodology for partial payments has been changed internally and now accepts positive and negative increments to an existing insurance payment. Change the status to a 3, 5 or 7 corresponding to the changed reimbursement.

Contacts

- The **View | Contacts** was added last month, but we overlooked the fact that personal contacts were stored by user and contact lists disappeared for some users. This was quickly remedied and an update posted the same day the problem was discovered.

EMR Notes

- There was a problem when multi-selecting and printing notes written by different providers. This has been fixed.
- A few users have seen a fixed note that appends itself to every note when that is printed. This is caused by the fact that at one time the first note could be entered without clicking the New Button. This was corrected a long time ago, but if you have a residual parasitic note, please contact us and we will remove it.

Prescriptions

- There is now an option for all clinicians in an office to work with one set of meds, instead of having their individual lists, when the **Share Checkbox** is checked.

Expenses

- The Expenses Screen was reconfigured last month so that all providers and the corporate entities could keep track of their expenses, after which some records ceased to be visible. The fix was posted the same day the problem was discovered.

What's New August 2005

General

- The addition of a fully integrated credit card function is a major enhancement this month, but we have made several others, in many cases following suggestions by our customers.

Credit Card Billing

- For fully integrated credit card billing, we now provide leading-edge secure access to an internet credit card gateway. This is preferable to the expensive option of tying up a phone line. The gateway that we have selected is used by many merchant account companies, accepts swiped card data, is full-featured, clear and simple to use, and handles card-present transactions. As well as credit cards, it will handle checks (ACH) that we expect to introduce later this year. We are also recommending a merchant account company. Please contact us for more information and sign up via TheraManager to get the lowest rates and the full benefits of integration:
- To use the integrated credit card function when entering payments.
    - Enter the dollar amount, Select "Card" and click the Post Button.
    - The Credit Card Form will popup with the bill-payers card information.
    - If the information is correct then click the **Submit Stored Info Button**.
    - If you have the card reader installed, the checkbox checked and the card is present, then swipe it and the card information will appear. Enter the CVV characters and click the **Submit Swiped Info Button.**
    - The transaction will be made, the Form will close, and the Posting function will be completed. The last 4 digits of the card number will appear on the patients bill, and the Approval Codes and TransactionIDs will be shown in the Payments and the Transaction Grids for reconciliation purposes.
    - Credits and voids can be made from within the program and the transaction recorded appropriately. Pre-authorizations and captures are also possible.
- There are two changes to the format of the stored card info. The name on the card and the card expiration date have each been split into 2 fields. The old date and name will be visible for a couple of billing cycles in the cream-colored boxes.
- We will provide you with a test log-in for initial testing.

Appointments

- The Booking of Appointments has been enhanced. There are now 2 menu items on the popup menu for booking, **Book | Book/Rebook** and **Book | Book/Post (Fast)**. Clicking the former opens the **Book Form** only. Clicking the latter will immediately book an appointment with the default parameters, and if the time is less than the selected time +1 hour, open the Post Form. A double-click is the same as **Book/Post (Fast)**.
- There are 2 additional menu items for using <u>provisional appointments</u>. **Book | Change to Provisional** and **Book | Change to Firm**. Provisional status for both patient and other appointments is shown with a cross-hatch. Double-clicking a provisional appointment will convert it to a firm appointment.
- The functions of **Copy**, **Cut** and **Paste** that used to open the Book Form, have been modified to literally move or copy an appointment just as if they were text in a document. Clashes are automatically flagged.
- **Book Other** providers appointments has been modified to allow the selected contact name to be automatically entered in the note when Contacts are selected instead of Providers.
- We have introduced tags attached to the displayed appointments.
    - A "–" shows that the patient is set for an appointment reminder (This has been changed from a more obtrusive "#"). This is set when the appointment is booked and is remembered as a default. If you do not do phone reminders, then uncheck the **Remind Checkbox** when booking appointments.

- If a Task is created from the popup menu as a task linked to the appointment then a "+" is shown.
- When the task is done a "^" is shown.

Task Management

- The **Tasks Screen** has been enhanced visually and functionally:
  - The records are now color coded by their category.
  - The details of a selected task can be entered at the bottom of the Screen. (It used to be at the top).
  - Tasks can be created for any person or entity in the **Title Box** by dragging-and dropping from the **Title Box** onto the **Task Grid**.
  - User initials have been added to the grid, so that when you assign a task to another user using **Assign** on the popup menu, you can see that person's initials listed in the **Task Grid**.
  - If you want to create a task for yourself, select **Tasks for | Me** on the popup menu and click the **New Button** on the Toolbar.
  - Tasks can still be created for Appointments by selecting the appointment and clicking **Task (Linked)**.

Follow-up Appointments and Archiving

- The **View | Follow-ups** on the system menu has been expanded and the date dialog made clearer to use. **Periodic**/**Archivability** adds 2 options to view patients for whom there has been either no appointment or no medical record since a selected date. This is good for scheduling routine follow-ups or for archiving inactive patients. The other option is for selecting patients who were scheduled on the **Popup Notes** for a follow-up prior to a selected date.

Accounts

- We have simplified the bills to make them more easily understood by the patient. There are 2 columns, one for the patient billed amount and one for the insurance billed amount, payments are shown as negative (in parenthesis), and corrections from the estimated billing also appear there.
- Billing for a tertiary Insurance has been turned on in beta mode, ie. use with caution.
- A button has been added to the Posting Form that will copy the **New Balance** into the **Paid Now Box** for pay-at-the-time.

Payments

- In order to manage the vagaries of insurance payments, the partial payment concept introduced earlier this year, is very useful, because you can add to or decrease the insurance payments in a CPT record or even pay them out of order.

Contacts

- Using **View | Contacts** on the system menu allows Contacts to be selected by any one of the 8 designated categories.
- As noted above contacts can now be scheduled into an Other appointment.

EMR Notes

- When the medical record notes are printed a footnote is added to each sheet to the effect that this is Health Protected Information along with the patients name and date-of-birth.

Prescriptions

- Archived patients no longer show up at the **Prescriptions Screen** unless specifically selected.

BinocularButton/Date Dialog

- A **Start Date Button** with a reset to today has been added to the **Date Dialog Box**. This button sets the end date to the start date so that you can view a 1 day selection of records at any of the accounting screens.

Expenses

- The Expenses Screen is a great way for individual providers or the corporate entity to keep track of mileage and expenses, and where the records are kept for reimbursement or tax purchases. It has been reconfigured so that all providers and the corporate entities can keep track of their expenses.

Brighten Your Day with a new Login Screen Picture

The current downloads of TheraManager uses a photo of so-called “nacreous” cloud. (“nacre” is an eastern word for mother-of-pearl/opalescent.) If you want to change to this picture or use your own, rename or delete the present Splash.jpg file in the TheraManager folder and then rename “New Splash.jpg” or your own jpeg picture to Splash.jpg. Nacreous clouds are rarely seen even in the Arctic regions and are caused by tiny ice crystals miles up in the stratosphere. This cloud was seen recently in Northern California in the lee of Lassen Peak.

July 2005

Accounts and Bills

- For those offices who have insurance information turned off in the bills, this change will not be visible. The bills have been modified to make them much clearer for estimated billing and the corrections that often occur when the allowed amounts etc change. There are now separate columns for the total charge (ie the amount added to the total balance with insurance included) and for the amount billed to the patient.
- Added a separate column for check numbers or credit card authorizations on the **Patient Bills Screen,** but they will continue to be added to the description so that they appear in the bill.

Batch Print Screen

- This screen has been reformatted.
- Patients bills can now be ordered by the virtual corporation for those offices using this setup.

Appointments Screen

- There is now a privacy option on the **Appointments Screen** which allows you to blank out all patient names on the appointments calendar. This is set with a button just above the refresh button beside the **Month-at-a-glance Calendar.**
- The user initials displayed on the banner that floats above an appointment are now those of the last person who changed the status of the appointment, for example you will be able to see who cancelled an appointment.

- The **Booking Form** has always been capable of printing Appointment Cards using a Dymo Printer. This is a nice feature to use and the printers are available on the web at well under $100.
- The printing of appointments has been modified to print all the appointments continuously and to optionally omit the lines for open appointments (separated by the number of minutes between grid bars on the Appointments Calendar). You will need to visit the **Tools | User Settings** to customize the print to your needs.
- The printed day sheet of appointments now includes the patient's mobile phone number.

Documents
- The display of scanned records has migrated to a new **Documents Screen**.
- TheraManager now opens scanned files within the program, although a checkbox option allows for the use of an external viewer.

Diagnosis
- There is now a link between DSM IV and ICD-9 codes.
    - You can do an ICD-9 diagnosis and then transfer the codes to the **DSM-IV Screen** using the popup menu on the DSM-IV Screen.
    - A better method is to use the ICD-9 codes directly on the **DSM-IV Screen** by selecting ICD-9 in the new checkbox.

EMR
- There are 2 more layout options for Forms:
    - A subheading can be created using the Field type of "H".
    - The button and checkbox groups will expand across the full width of the screen if the Note number is left blank.
- As an example we made a neat on-screen **Encounter Form** using these new features.
- Import and Export of Forms has migrated from the **Actions Menu** to the Popup menu on the **Form Designer Screen**.

Family and Patients Screen
- The **Family Screen** has migrated as a sub-screen to the **Patients Screen**, and now permits the sex of children to be defined and calculates their ages. The age is refreshed every time you access this screen, as it is on the **Patients Screen**.
- The field for **Emergency Contact** has been expanded to 40 characters so that the contact's relationship to the patient can be included.

Prescriptions
- Added an option to include the DEA# on all prescription scripts instead of only just those for controlled substances.

On-line
- A link to your clearing house drop box can be entered on the Corporate Screen and used from the **Help | Online | Clearing House** menu.

June 2005

General
- TheraManager had and will continue to have Templates and Forms but the major news item this month is that it now works with ChartEvolve, which further expands the EMR options.

International Use

- TheraManager is now designed to be consistent with the selected Microsoft date format. Additionally the masks for phone, ZIP and SSN that apply to the US can also be removed at the **Tools | User Settings,** so that the program can be used internationally. Some US users may also prefer not to use those masks.

Accounts Screen
- Summaries have been added to the CPT Records Grid.

Appointments Screen
- An option to select those patients who have not had an appointment for a specified time is now available under **View | Followup Appointments | All Patients** from the system menu. Another option allows all the patients with preset follow-ups (set on the popup Notelets) to be similarly selected.
- If you are a Clinician, you can now go directly to the **EMR Screen** from the **Appointments Screen** by double-clicking on the patient's appointment or use the pop-up menu item **EMR**. To set the double-click option, open **Tools | User Settings** on the system menu and check the **Open EMR with Double-Click Checkbox.**

EMR
- TheraManager now works with ChartEvolve to allow automated note-creation. It can be opened in 2 ways:
  - Using the double-click feature on **Appointments Screen** (see above), TheraManager goes to the EMR Screen and opens Chart Evolve if installed on your machine. It passes the patient's and visit information to ChartEvolve.
  - ChartEvolve can also be opened from the EMR Screen in TheraManager using the popup menu **Auto-Note | Create** menu item.
- The text created in ChartEvolve can be inserted into a note in TheraManager using the **Auto-Note | Import** menu item. If the visit information was passed any change to the cpt code made in Chart Evolve will be updated into the visit information on TheraManager.
- If you have existing forms that you wish to modify in the **Form Designer**, you should first open the form in the **Form Designer** and add either an "S" or a "P" to the <fieldtype> column of each row as appropriate. This will then allow the automatic addition of extra rows.
- Another feature that has been added to the **Forms** allows the addition of "***" to any of the text boxes by double clicking on a box. The intended use of this is by a clinician who wants to point and click a form with the patient present (eg on a TabletPC) but wants to mark areas for the insertion of additional text at a later time.

Prescriptions
- We have added an option to print a blank script when inserted centrally into a printer (eg when using the envelope guide on some laser printers). Use the **Central Checkbox** at the bottom of the **Prescription Screen**.

Letterhead
- Many of you have websites and have requested that we add this to the letterheads, which has been done. The website address for bills and statements of service should be entered at the **Admin | Corporate Screen,** else it should be entered at the **Customization | Provider Screen.**

Business Reports
- Added the receivable from canceled and missed appointments, and any Pat Debits to Receivables.

Payments Screens

- Sorry, we recently made a mistake in fixing up your mistakes! Patt (pay-at-the-time) payments have not always been removed from the patients bills when voided at the **Payments Screen**. The missing link will be corrected on all postings of patt in this update. However, any Patt payments voided recently from the payments screen (viewable in Voided Transactions) should be checked since they may not have been removed from the patients account.

New Login Screen Photo
- We have added a new login photo to the Update, which you can use in the following way. In the c:\Program Files\TheraManager folder, rename the old “Splash” file and then rename “New Splash” to “Splash”. You can, of course, use your own photo by copying it into this folder and renaming it “Splash”.

Updates
- Updates must now be done from the **Help | About Screen**.

May 2005

General
- This month the program reflects some more ease-of-use enhancements and improved business reports.
- There are many options in the program for access to data away from the office including internet access (which no longer requires a static IP address and the associated monthly charge), the TheraManager PDA module etc. A further option “FLASH & CARRY” has just been added that allows the program and database to be ported and run on a flash memory.

Updates
- Updates should be done from the **Help | About Screen**. If you receive a reminder, please contact us for a new registration certificate.

Flash & Carry
- TheraManager is designed to run on a flash memory, which makes porting to multiple computers particularly for a solo practitioner very easy:
    - Install TheraManager on your flash memory.
    - Add “Flash Data=” to the ads.ini in the TheraManager folder on the flash drive.
    - Set your TheraManager desktop icons to point to the TheraManager.exe on the flash drive.
    - Select **File | Database | Select** on the system menu at the **Login Screen** and select “Flash Data” before logging into TheraManager.

Business Reports
- All the printed reports on this screen, except the “Tax Year” Summary, have been revised to make them more complete and detailed.

Transaction Screen
- An Option to select records by DOS or postdate has been added to the **Accounts Transactions**.
- A count has been added to the **Patients Demographics Screen** to summarize who, what and where.

View All Records/”Binocular Button” Date Dialog
- A **Lock Button** has been included on the **Date Dialog** locks the selected date window when moving from one screen to another to make tracking history much easier and quicker.

- An option to change the post date was added to the **Date Dialog** a while ago. This enables the postdate to be changed throughout the program, which has several uses, but remember that it is permanent until changed back or you log out of the program.

Accounts

- There is now an option to add a credit card payment block to the patients bills. This is enabled at the **Corporate Screen** after an administrative login. This is a precursor to adding a credit card billing option to the program.
- Post date has been added to the bills as well as the date of service.
- The **Explain Billing** popup menu item has been extended to include details of the patient's insurance to make it easier to contact the insurance company to resolve issues related to specific cpt records.

Appointments Screen

- Repeats of Group appointments, which were introduced 2 months ago, have been enabled.

EMR

- The Treatment Plan is no longer hard-wired into the program. The checkbox names and insertion text must be included in the Form Designer, in the same way as in the other forms. If you have any problems send us an email to request a copy of the standard Treatment Plan Form.

Prescriptions

- The New York State prescription format has been fixed.

Charity Form

- The **Charity Form** has been renamed to the **Funds Form**. It has been modified to make it easier to understand and use. This form was originally intended to record charity funding to patients from central funds. However it can be used to give payments to patients from any fund or even used for discounts from fixed regular charges.
- The Funds Dialog can be viewed from a popup menu on the **Appointments Screen** or the **Accounts | Billing Screen**. Multiple Funds or Discount can be set up on the left hand side of the Dialog. Patients can be assigned one or more funding sources. These will be checked automatically when posting appointments and used if affirmed.

April 2005

General

- This month the program reflects a bunch of changes, many under the hood, to improve the reporting of business data, as well as important changes and enhancements to several features.
- Thanks again for your continuing referrals to your colleagues and your great testimonials.
- We were interested to see recent discussion about writing Medical Records on the User group. Based on this an additional option for importing DSM IV Axis 1 only was added. A question on how to obtain phone reminders in TheraManager, asked in the same forum, is answered below.
  Anybody can access the user group through **Help | On-line | User Group**.
- Please remember **Help | Context** or click F1, which can be very useful on all the screens.

Appointments Screen

- We have liberalized "Delete" on the Appointments Screen to permit the deletion of posted appointments, as long as the user has the right to post an appointment. Note that this will not remove any accounting information, which would require voiding at the **Accounts | CPT Records Screen**.

- As a reminder you can elect what you see when the Program opens eg your appointments and your patients. Go to User Settings under Tools on the system menu.
- You can also view your appointments at different locations, or view room occupancy in a group practice by selecting **View Appointments by Room** under View on the system menu.
- **Phone–Reminders** is an original feature that can save a lot of time and works in the following way.
  - Select Task Manager at the Appointments Screen, right click and select **Get Appointment Reminders for**.
  - The default (after noon) is for the Appointments for the following business day to be selected.
  - The appointments will be imported into the Task Manager with the details of each Appointment in the text box at the top as the appointment is selected.
  - Also when the appointment is selected, the patient's name is selected in the Title Box and contact information displayed.
  - An email can be created by clicking on the hyperlink, if the patients email address is visible, or the phone can be dialed automatically if the computer is equipped with a <u>phone- modem</u> (NOT the usual data-fax modem).
  - Appointments are booked with the remind feature checked, but for those patients not requiring a reminder, this should be turned off and will be remembered.
  - Selecting a date in the Done column will cause the reminder to disappear.

Posting Appointments

- A tighter logical link was made between the **Check Assignment Checkbox** and the Direct, Estimated or Deferred Billing options.
- Added **No Copay** and **No Claim** checkboxes to provide these options when posting appointments.
- An option that calculates copayment as a percentage of the amount charged, independent of an allowed amount, was added for use at least in Massachusetts. This option is set at the **Orgns/Plans | Plans Screen** in a new checkbox under Benefit Details. The default remains for copay to be a percentage of the allowed.
- Posting a zero charge was modified to be more user-friendly.

Accounts

- Since the date-of-service, when known, is now shown in the dos column for all postings and payments, we have dropped including this information in the description.
- We have used the partial payment flag as a way to allow reverse status changes to the cpt record that were previously forbidden.

EMR

- Extra periods can appear in the insertion from the forms because the periods have been put in the **Text for Insertion column** in the Form Designer as well as being inserted by the Program. This has been changed. They will no longer be inserted by the program and must now show in the **Text for Insertion column**. Also a third option has been added to the operation of the **Pronoun Columns**. These changes may require a quick review of each form that you use in the **Form Designer Screen.** The three options for the **Pronoun Columns** are:
  - A blank, which means that the patients name will be inserted into the text.
  - Any pronoun or text (based on the patient's sex) to be inserted into the text.
  - A "-" (hyphen) will now cause nothing to be printed as a name or pronoun.
- The Treatment Plan is no longer hard-wired into the program, so that you can modify the checkboxes and insertion text in the Form Designer, in the same way as in the other forms. As well as the new version of the program, you may need to request (send us email) a copy of the Treatment Plan Form that you can import into the program to make this work.
- Renaming the records was introduced a while ago, but the records can now be sorted within the columns.

- An additional option on the popup menu allows for importing only a DSM-IV Axis 1 diagnosis into the medical record instead of the full 5 axis..

Login
- Login has been speeded up.
- Registration has been made more comprehensive and will now include information about your support agreement. If you do not have one, or the information is not included in your current registration certificate, you will receive a reminder at login. Contact us for a new certificate. The contents can be reviewed in **Help | About**.

Authorizations Screen
- An option to search for patients by date of birth has been added at the bottom of the screen in case the names were not provided by the insurance organization.

Earnings Screen
- The **Checking | Earnings Screen** has been stream-lined.
- A biweekly, monthly or weekly pay-period can be selected.
- The earned field can be modified until the check is printed.
- The earnings are calculated automatically whichever algorithm is selected.
- The information in the printout more accurately reflects the algorithm.

Transaction Screen
- The rework through the program has allowed the collection of more business data at the **Transactions Screen**. Additional columns show CPT code, place-of-service, break-out of receivables, insurance plans and organizations.
- More summaries of different groupings have been added.
- All the columns can be selectively suppressed for a customized printing. Additionally a button has been added that suppresses all the non-financial columns in one click for a compact financial printout.

Payments Screen
- You can now leave the **Patients Payments Screen** while a split patient payment is in progress, just like insurance payments.
- A **Provider Button** has been added to the Patient Payments Screen so that payments can be credited to selected providers. This is useful for those group offices, that are trying to keep records of provider earnings without using the virtual-corporation or profit-center setup that we generally recommend for this purpose.

Pop-up Notes
- The auto-hide feature has been modified so that the Note hides itself if there is no text or an image associated with it and pops-up if there is.

Prescriptions
- Script formats to meet the requirements of DE and PA have been added.

March 2005

General .
- This month the program reflects several new features and modifications to old ones that mostly reflect requests that we have received.
- In particular this month we have added an automated **tax** capability for our users in Hawaii, and a **group** capability to the Appointments Calendar for those running groups. Login has

been improved and sizing improved. Using your LCD monitors at native resolution and letting TheraManager take care of the rest, is the best. 800x600 is the minimum but there is no requirement to use this resolution.
- We thank you for your continuing referrals to your colleagues and your great testimonials.

Appointments Screen

- Patients can now be booked as a group and assigned to the group. The mechanics are the following:
    - At the Appointments Screen, click the Provider Tab/Button.
    - Click on the Appointments calendar at the group start time and pull it out (left-mouse down) to the total time.
    - Double click in this area and Book an Other | Appointment slot with the Group name and designate it as a Group/Special.
    - Set up a group cpt code with a 5 min duration at the Customization Screen.
    - Now book a bunch of patients on the light blue group time.
    - Just for effect, mark one as "Canceled"and one as "Missed".
    - Select one of the appointments then right click and click Group Members | Booked.
    - This brings up the Group List. Clicking on any name in the group list causes the name to be selected in the Title box. Right click to print the list.
    - This can be applied to save you time in writing your notes at the EMR Screen. Write your first note and copy it to the clipboard. Click the next pat on the list and paste to their new note etc.
    - Another feature allows you to see the patients in the Group. Make an empty Group/Special time slot with the same group name and right click on it. Use Group Members | Find. The table will be magically populated and you can quickly make their appointments.
    - Stay tuned for Auto note insertion, Auto-booking and Auto-posting of groups.

Posting

- A new option allows posting of tax required for users in Hawaii. It allows for optionally billing the patients and always billing the Insurance Companies with the “S9999” code.
- We have added 2 checkboxes to the **Post Form**, No Co-pay and No Claim. When checked for an insured, no copay will be charged or no HCFA printed for the selected CPT code. Keep track of these idiosyncracies using the popup notelet.
- A fixed copay is no longer multiplied by the number of units of a CPT code.
- **MOD** codes now appear on the **Statement of Service**. Don’t ask us how to use them, but the customer who requested this feature is a national coding expert.
- The description on the printed bill after preprinting the **Statements of Service and Bills** now correctly describes the treatment code.
- Many people want to change the post date of appointments checks etc for example to calculate earnings within the month. This has been available for a longtime as a stealth feature. It can be done on the dialog box brought up when clicking the **Binocular/View All Button** and mousing over the print/post date until the calendar arrow appears. This option is now available when the **Binocular Button** is clicked with the **Post Form** is open. At other times on the Appointment Screen this button will autobook the selected patient. The post date change is permanent until logout.
- The ability to adjust the patients bill with charity funds has been in the program for a while. It has now been modified so that this is a real payment that will be reflected in the **Payments Grid** (day sheet) and the providers earnings.
- The bug associated with posting No-fee patients has been fixed.
- The ability to enter multiple CPT codes at the **Attended Form** has been enabled, as a way of providing input to the biller.

EMR

- The Scanned Files Screen has received an additional makeover. In particular a new checkbox **All Folders** causes all the folders that have been selected for any patient to be shown. Selecting one of these folders and clicking the toolbar **New Button** will then open directly into that folder, whether it is on the client machine or a networked server. This makes scanning and associating files with the patient a very quick and orderly process.
- The Treatment Plan was a legacy feature prior to its addition to the new Forms Screen. We have made some corrections to it to enable all the features but it requires a new file that can be imported from the **Actions** Menu on the system menu. Please email customerservicel@theramanager.com if you would like a copy of this file.

PDA

- The import of new Appointments from the PDA and the outgoing syncing of providers appointments have been fixed.

Patient Accounts Screen

- The insurance plan and organization names are always displayed in the grid on the **CPT Records Screen** as the extra time required is generally insignificant.

Electronic HCFA-1500 Forms

- The control number added to box 19 on the HCFA-1500 now prints correctly in an electronic file.

Payments Screen

- A capability to search for patients by the payers name (eg on a check) has been added to the **Payments | Patients Screen.**
- The way of handling insurance partial payments has been improved.

Organizations Screen

- An All Button has been added to populate the **HCFA-1500 Box 31** fields for all the organizations for the selected provider from the entry on the Customization Screen.

February 2005

General .

- A lot of enhancements for the program this month as we continue to evolve TheraManager as your all-in-one office solution.
- In particular, check out the new features of the **EMR | Scanned Files Screen** and the colored records at the **Accounts Screens**.
- We thank many of you for recommending this program to your colleagues and appreciate that, not only as a service to us but also to your colleagues.
- You will be hearing a new voice on the phones. Roopal Karia has joined us to help with customer service and support.

Booking

- Follow-up appointments can now be **Auto-Booked** from the pop-up **Notes & Reminders**.
- This is in addition to the regular feature to Auto-Book appointments using the **Binocular Button** at the **Appointments Screen.**

Posting

- A new option allows posting items other than CPTs, eg sale of supplies, meds, literature. To do this create “CPT’ codes at the **Customization | Codes etc Screen** and choose a type number in the Type column. (This will be updated to a text description for easier tracking. We are also planning an inventory screen). These codes can be printed in the normal way at the Posting form generally using the Multi-CPT Button. If this is a standalone purchase, the resulting Booked Appointment will need to be deleted after posting the purchase.

Accounts Screens

- The following has been our most requested feature and we are glad to finally provide it in this elegant form.
- Each type of record on the grid on Accounts | Patients Billing Screen now has a different color background. This makes it easy to distinguish the original posted record from a patient or an insurance payment. From now on the DOS that is associated with each record will be put in the DOS column. This then allows you to pick up the DOS column header and place it above the grid (where it says “Drag a….”) and group by DOS, ie all the payments and postings associated with that one DOS will appear together, which makes it much easier to track and analyze.
- We introduced support for partial insurance payments last month. This month partial payment records are highlighted in pink at the **Accounts | CPT Records** and the **Payments | Insurance Grids.**
- We also use the partial payments feature to solve another frustration. In the past once an insurance payment had been made, it could not be added to, and therefore changing the cpt record status back to a 2 was not allowed. This has been changed. If there is an extra reimbursement for a record, the status can be reset, when the record will be marked as partial and the reimbursement can be entered as normal. Please eyeball the patient charges in this case to make sure that the automatic write-offs are correct.

Payments

- The contents of the **Insurance | Payments Screen** can now be printed with the **Print Button** on the toolbar.

Grouping (move column header **Description** to the “Drag area above the Grid) has been enabled on the **Payments | Other/All Screen**. It will now show the total number of dollars collected in each category, eg patt (pay-at-the-time) to check the till.

Insurance

- A list of insurance organizations for whom the providers are preferred/in-network is now available under **Printing | Insurance | PPs by Organization** on the system menu.

Medical Records

- The popup menu on the **Notes Screen** has been reconfigured.
- Templates can be either appended to an existing note, or be inserted into a new note created depending on which menu item is clicked. (ie. The dialog has been removed).
- This is a useful hint for those not aware of it. If you type normally, the template will expand with the extra text, but if you click the **Insert Key** on your keyboard, you can type text in the spaces without the template characters moving.
- The features on the **Scanned Files Screen** have been made much more comprehensive and easier to use.
- Longer pathnames up to 80 characters are now permitted. In a networked system the actual scanned files may, and should, be stored on a server for accessibility and backup purposes.
- A wider range of files can now be viewed including pdfs and faxes.. The updated list includes bitmaps, jpegs and pdfs, plus 2 common fax formats tiff and winfax format. A program such as PaperPort 9.0 will save your scanned files in pdf format. The pdfs will open in the Adobe Viewer. Once this has been sized to the viewing area in TheraManager, it will stay at that size for seamless viewing.
- Scanned files can be sorted automatically by Category. The category comes from the name of the folder that any given set of files is stored in, ie set up your categories before you scan.
- New pathnames can be added to the patients list using the **New (+) Button** on the toolbar. After the first file has been stored for any location for the patient, the dialog box will automatically opens at the folder for the selected category.

Prescriptions

- Colored bands on the **Prescriptions Grid** now designate if the med was a sample, or prescribed by another provider. Controlled substances are marked with red text. Samples need to be marked as such in the **Sample Checkbox** before posting in the normal way, but other meds can be posted without details using the **Other Button**.

User Access

- A 'time-clock' has been added to the program. Logged-in and logged-out users can be seen at the **Transactions | User Access Screen** and the total hours logged in for any given time viewed.

Rights

- A feature has been turned on that allows the administrator to restrict the rights of a user (who may, of course, be a provider) to not even see the names of the patients of the other providers, for the ultimate in HIPAA confidentiality.

Network Server Database Engine

- The install for the database engine on the website has been refined and is now a single step install. Additionally this install puts an icon for the configuration file on the desktop and makes changes to the registry to change the default settings.
- We suggest that you either do this download or create a shortcut to the ads.cfg file on your desktop.
- If the ads.cfg configuration has already been modified for your office, you should observe the current settings before doing the download and then restore the old settings as described below, if the new defaults are lower than your old ones.
- You can then monitor the use of your database. There should be a 100% safety margin between the maximum used and the configured for workareas etc. These can be changed in the Configuration Utility Tab. If you get an error message about too many workareas or datalocks you must change the setting at once.

Network Addresses

- If your system is slow to connect on a network, this can be speeded up using the IP address of the server as described in **Help | Howdo I…| Setup hardware**. This is the best method of defining the ads.ini file but you may need help from your IT support person. The File | Database Setpath is still the easiest way to set up client machines.

Miscellaneous

- This is a reminder that Authorizations entered at the **Authorization Screen** can be authorized for:
  - The provider selected in the TitleBox.
  - Any provider, by checking the **Provider Independent Checkbox**.
  - The principal provider by clicking the **Principal Provider Button** at bottom left.
  - Authorizations can be entered for any CPT code by selecting the "Multi" CPT code. If you do not have a "Multi" code this can be entered at the **Customization | Codes etc Screen**.
- For patients with institutional bill-payers, the **Other** bullet has been returned to the **Bill-Others** and **Insurance Screens** after a temporary absence.
- The **+DOB** checkbox on the Patients Screen has been tamed. It had been set to automatically be checked for duplicate names, which put the dob on the HCFA. If you have any patients with the dob appended to the patient name and you wish to remove it, go to the **Patients | Screen**, make sure that the **+DOB** checkbox is unchecked and do a Save (Ctrl+s).
- We added sizing of the program a while ago so that it sizes to fill any screen (although it can be normalized at Login to 800X600). We recommend using a higher resolution than

800X600 especially on LCD displays, which are best used at their native resolution, and for viewing the Accounting Screens.

- At the **Appointments Screen**, the option for automatic switching to the patients principal provider has been disabled. Instead the program will ask if this switch is required. If you do not want this flag, it can be turned off at **Tools | User Settings**.
- Also at the Appointments Screen, Missed Appointments posted from the popup menu now correctly change to the posted color and can no longer be reposted.
- The scoring of the forms on the **Forms Screen**, which you can customize, now conforms to normal arithmetic rules.
- The Medical Record is now auto-saved before printing.
- Just as a reminder for the types of billing to be used when posting, our recommendation is **Direct** for self-pay patients and if you decline assignment, otherwise use **Estimated** for those with one insurance and **Deferred** for patients with 2 insurances.
- We would like to clarify our current actions with respect to Box 29 on the HCFA-1500 form until the Insurance industry dictates otherwise. We leave Box 29 empty for the first insurance even if the patient has been billed. For printing the secondary HCFA, we enter the amount paid by the primary insurance as required by some insurance companies.

January 2005

General .

- We wish you a Happy New Year and recommend that you start the year right with an update.
- Remember to reset your YTD Totals at the **Batch Print Screen | Reset YTD Totals Button**.
- This month continues to see the evolution of new features.

Diagnosis ICD9 Screen

- Functionally unaltered, but it is now much easier to use to categorize and select the ICD9 codes that you need.
- Patients can be sorted in the Titlebox by the categories of their diagnoses.
- This sorted list can be exported as a mail-merge file from the **Actions** menu.

Prescriptions

- Patients can be sorted in the Titlebox by their medications. At the Prescriptions Screen select the medication, then select **Patients on Selected Med** in **View** on the system menu.
- This sorted list can be exported as a mail-merge file from the **Actions** menu so that you can mail patients info about the latest FDA ruling for example.

Remote Access

- New components that give faster remote access are part of the update this month.

Medical Records

- The name of each Medical Record, Note or Report can now be changed at the EMR/Notes Screen.
- To do this type and/or select the required text in the note, and then right click it, and select **Rename Note** on the popup menu. The spacing for this name can be increased on the header and the maximum number of characters will be increased.

Tracking Names

- The tracking of insurance names and organizations with selected patients on going screen-to-screen has been improved.

Posting

- The billing of partial units was added a couple of months ago but did not work for Medicare. This has been fixed.
- Pre-printing SoSs on the Appointments Screen with automatic pre-posting for self-pay patients is now working properly.

HCFA-1500s

- The HCFA-1500s only have room for 4 diagnosis codes that are designated in each line item with a numerical code. On a given HCFA-1500 page if more than 4 codes are used, or the positions of each code is not kept constant between records, then the numerical code generated at posting will no longer be correct. This issue has now been addressed. If records with more than four codes try to print on a single HCFA-1500, the culprit is flagged and the print is aborted. In all other cases, the positions of the diagnosis codes are checked. If necessary the positions are adjusted and the numerical codes are recalculated to match.

December 2004

General

- If you are networked, the program will now prevent the update from running if anyone else is logged in.

Popup Notes

- Added option to display patients photos in the popup notes. Click the **Photo Button** and use **Load Photo** on the pop-up menu.

Appointment Screen | Contact Manager

- Added option to search for any phone number recorded in your database. Type into the number into the **# in Phone Log Box** and click the **Go Button**.

EMR

- Added a screen in the EMR Section where you can attach and view scanned information by patient.
- Forms are proving popular so the number of available fields has been increased: radiogroups and checkboxes to 72 and checkbox groups and text boxes to 36. Remember that you can export and import forms once you have made them for exchange with your colleagues.

Payments

- Added an option for Partial insurance payment ie you can enter the insurance reimbursement but mark it as a partial, while contesting the reimbursement. Any additional amounts will be added when the appropriate EOB is entered.

Posting and Billing

- A little known feature available on the date dialog brought up when clicking the **Binocular Button** has been extended. As well as changing the post date, this also changes the billing date. This for example would allow you to appear to do all your end-of-the-month billing as of the first of the month. Once this date has been set it persists until you log out.

Earnings

- Added option to use different percentages for payments received from patients and those from insurance, which presumably, despite the use of TheraManager, you might argue incur higher overhead for your office.

Prescriptions

- Several improvements to improve the interface and operation of the prescription Writer.

Statements of Service and Bills

- Additional explanation has been added to prevent self-pay patients from sending the wrong piece of paper to their insurance.

HCFAs

- We received a request concerning denied Medicaid claims in Louisiana that a control number be added to box number 19 on the refilled HCFA. This option is now available on the Accounts | CPT Records Screen. Scroll far right and use Edit mode from the pop-up menu. Close Edit mode before trying to selectively print the HCFA.

November 2004

General

- The big news this month is in EMR/Notes with the capability to customize and score the checkbox forms for any specialty. Scoring allows for outcomes based medicine (eg the score can be inserted into the Patients meds record). The output from these forms can then be inserted into the medical record. See below for more.
- The database engine received a major update exactly a year ago, and the current update adds more behind the scenes advantages.
- The Screen Buttons have been realigned to be logically clustered.

Notes/Reports
- Checkbox forms can be opened on the new Forms Screen. Samples are provided for mental health but any form can be modified or designed for any specialty. The Treatment Plan has also been moved from the Diagnostic Screen and now appears in the forms list, where it can be customized. All the information on these screens can be inserted into a Medical Record or Report from the popup menu either as simple prose without the normal parameters, or as a complete list with subheadings.
- The forms can be scored for outcomes based medicine. One option is to insert scores into the Patients Meds, which can be viewed at the Prescriptions Screen.
- Forms can be modified and new ones created on the Form Designer Screen. The current limit on the number of Radio-groups, checkboxes and memos is 24.
- Forms can be imported for use by you or exported for use by your colleagues.
- If you down-loaded an October Update or Demo before receiving this email, you should do the update again, since we added some important 'housekeeping' features that make the form more robust and versatile to use. If you do not see the TREATMENT PLAN in your list of forms, you will need to go to the Forms Designer Screen, delete all the forms with the Toolbar Delete Button and then go back to the Forms Screen. The sample plans will reappear.

User Settings
- This little screen under Tools on the system menu has been augmented to include options for:
  - Which view, All, Day, Week etc opens when the program opens.
  - Whose appointments the Program opens with.
  - Whether 'Clients' or 'Patients' are used in the {Program.
  - Whether you expect to use Headed notepaper for Bills, Superbills and Reports or want TheraManager to create the letterhead.

Accounts
- This CPT Records Screen has not changed this month but we would like to remind you of a couple of features.
  - The right pop-up menu has some very useful items with which you should be familiar. It also shows the meaning of the Status Column. If you do not understand the significance of that column, please read the Help (F1).
  - There is a menu item under **View** on the system menu that allows you to select all Unpaid/**Delinquent** HCFA-1500s Claims or **All** Records. We recently had a user who observed that the Receivable total from the Program was less than the total received by the clearing house. The discrepancy was easily seen using the View All CPT Records feature. Some records were sitting at status=1 because the Batch Print SoS Checkbox at the Bill-Payers Screen was incorrectly checked for some Patients, and others went directly to status=8 because the insurance Plan had not been assigned to the patient before the CPT Code was posted.

Prescriptions
- We have changed the script layout so that the number of tablets can be written in full, which is now required for controlled substances in several states. You may also import a signature into a script or a fax. Just scan your signature and save it in a file in the TheraManager folder.

Appointments
- The capability to book long (16hr) appointments has been added.

Patients

- If you have a corporate bill-payer for multiple patients, you can enter this payer at the Contacts Screen and then use **Copy Contact to Bill-Payer** under **Actions** on the system menu to paste this information into the Bill-Payers Screen for these patients.
- Remember to add all those Pharmacy, Co-provider, Family Doctor Referral names to Contacts List so that they are ready for use on the Patients Screen.

Customization

- A complete set of CPT numbers for all medical specialties has been added to the Master Data. A search engine is included on the **Codes etc Screen** that will look for key words and categories, eg “nasal” will bring up all the cpt codes relating to the nose and “mental” will bring up all the Mental Health codes. You can then add selected codes to your providers list.

Printing

- If your printer margins are not quite correct, you can now set a margin increment under **Printing** on the system menu that will be remembered and used when printing HCFA-1500s and bills.

Locks and Work-areas

- If you get an error message relating to data-locks or work-areas, just close the Program and restart it. When convenient give us a call and we’ll tell you how to increase the default values on the database engine to avoid this message.

October 2004

General

- The big news this month for the Mental Health providers is the Mental Status/Routine/Chemical Assessment and Treatment Plan Screen. The checkbox items and notes can then be inserted into the medical record. See below for more.
- We can provide the same checkbox capability for non-mental health specialties.
- TheraManagerPDA has a new graphical screen for day-at-a-glance viewing and a new simple install.
- Do download XP SP2 from Microsoft, but be prepared to change some settings as outlined below, if you are using a peer-to-peer network.

Notes/Reports

- The new Assessment Form for mental, routine and chemical assessments is opened from the right-click popup menu on the Notes/Reports Screen. There are ample checkboxes and note boxes for each topic. The Treatment Plan entry has also been moved to this form. All the information on these screens can be inserted into a Medical Record or Report from the popup menu either as simple prose without the normal parameters, or as a complete list with subheadings.
- If you down-loaded the October Update or Demo before receiving this email, you should do the update again, since we added some important ‘housekeeping’ features that make the form more robust and versatile to use.

Appointments

- Phone Reminders of Appointments were always available, but now we have added a capability to generate an email reminder. At the **Tasks Screen**, right-click for the popup and select **Get Appointment Reminders** for either the selected provider, or all providers. The View All (Binocular Button Dialog) will popup with the following business day selected. Click OK and all the booked appointments for which the **Remind Checkbox** was checked on the **Book Appointment Form** will be assigned to the **Tasks** Screen with the appointment information showing at the bottom of the Grid. Click on each task in turn to view the contact information. Click the phone number to dial or the email address to create an email in your email client. The emails will be complete but you will need to click the send button on your email client.

Insurance

- Decimal units have been added to meet the Medicare option of billing for partial units.
- Box 29 on the HCFA-1500 is automatically filled on the Secondary HCFA-1500 claim with the amount paid by the primary insurance.
- The GRP# (Box 33) on the HCFA-1500 can now be set independently for the provider and organization at the Orgns/Plans Screen. Clicking on the All Button will set this number the same for all providers as logically it should be.

Posting

- We confirm that Charity Adjustments made at Posting are included as income for the Office or the Provider that saw the patient.

Authorizations

- For code independent authorizations use “Multi”, which you will have to add to your list of CPT Codes at the **Customization | Codes etc Screen**.

Payments

- The Payments Screens have not changed this month but it is worth pointing out 3 features on the **Payments | Other/All Screen**.
  - Any Erroneous Payment should be voided using the right click popup **Void** menu item and not done at the **Accounts | Patient’s Bills Screen.** In this latter case the record can be removed but the payment would stand as an incorrect credit to your business all the linkages to other accounts for a split payment would be ignored.
  - The **Print Button** at the bottom of this screen prints all the payments made into the system, since the button was last clicked, onto a plain sheet of paper, or one or more deposit slips, ie this is your record and total of checks and cash for bank deposits.These will also show on the **Checking | Account Screen**. This print should be used prior to every trip to the bank.
  - The default set of records for this screen are today’s payments, ie your Day Sheet. This can be printed out by clicking the **Print Button** on the toolbar.

Prescriptions

- Remember that you can customize your own list of prescriptions. New ones with the regimen will be added every time that you write a prescription. Unwanted ones can be deleted by selecting the medication and clicking the Delete Button on the toolbar. In order to use the faxing capability for prescriptions you must have Winfax 10.03 installed on your computer with Windows XP.

DataAccess and XP SP2

- Not only does TheraManager work over your office LAN, but it will work over the internet to a remote database. Call for more information.
- If you have installed SP2 on a peer-to-peer network ‘Server’ running XP, TheraManager will no longer work on other than the Server. Do not panic or call us but go to the Support/System Page on our website and make the settings changes listed there or direct your IT professional to this screen.

TheraManagerPDA

- Our module for your Palm or PocketPC just got better. There is a new day-at-a-glance screen to make it easier to see where the vacancies are. The install is now as easy as installing the parent TheraManager.

August 2004

General

- TheraManager now has automatic sizing to fill your screen for all resolutions. The Screen can be sized but only before logging in. LCDs can and should be run at native resolution for maximum clarity.
- The Help files have been updated so for more information on some of the new features below, please see the Help, ie click on the Screen of interest and then click 'F1'.
- Backup & Restore are very quick and easy to use but as an alternative you might want to use a USB Flash memory stick. In fact if you buy a fast enough one (eg Apacer 20 Mbps), Main Data can be copied to it and run in situ, as long as you run **File | Database | Setpath** to reset the path.
- Check out TheraManagerPDA, it is about to receive a 'day view' screen just like TheraManager so that you can spot your vacant time slots outside the office.

Patient Screens

- Do you have patients with identical first and last names? We've added a **+DOB checkbox** to tag patients/clients year of birth in the **TitleBox**.
- If the town, state, zip autofill doesn't work for you, then turn it off at **Tools | User Settings**, but it has been made more user friendly. It is changed to make it less impetuous and you can enter either the town name or the zip. You can undo the scroll with Edit | Cancel (Ctrl+z) and delete the visible Town-State-ZIP record with the Eraser Button.
- Going to the **Bill Payers Screen** for a new patient now automatically copies the Patient/Clients information.
- At the **Family Screen**, you can create and assign categories for your patients, eg. Religion, ethnicity and affiliation. Patients can be sorted by these at the **Transactions | Patient Profiles Screen**.
- Remember that all your Pharmacies, Referrals etc can be entered at the **Contacts Screen** and then be listed.

Notes/Reports

- A powerful <u>search engine</u> was added a while ago to the **Notes/Reports Screen,** but not spotted by everyone (It is at the bottom left hand side, that lets you quickly locate words or logical combination of several words that appear in any of your notes or reports.
- The Insert Menu into a medical record at the **Notes/Reports Screen** was expanded to include not only diagnoses, treatment plans but current meds.

Insurance

- Upon entering the **Insurance Screen** for a new patient, the bill-payers data is now automatically copied. The **New Button** will still do the same job.
- An Insurance Plan **By Patient** option has been added to handle one of a kind plans. Create the Plan under an Organization at the **Orgns/Plans Screen** in the normal way and designate it as a By Patient type of plan before giving it to one or more patients. You can then set up different copays, deductibles etc for different patients with this same plan.
- To distinguish among multiple plans we've <u>added a Plan Nickname field</u> to the **Orgns/Plans | Plans Screen**. Examples of use might be 'Tricare $ 20 copay Plan' or 'BCBS of NJ By Patient Plan'.

Printing

- After previewing a bill, statement of service or HCFA, the program will now ask if the paper was printed rather than assuming so as in earlier versions. If **Printing | Preview** is

not checked, the program will assume that the printing was completed to avoid having yet another Yes/No dialog box.

- If your paper HCFAs are misaligned in your printer you can now adjust the line height from +/-0.2", by increments of 0.1" under **Printing | Margin** on the system menu.
- At **Print batch Screen** you can now sort the Bills and Statements of Service by either Provider or Patient.

Prescriptions

- We have done a little bit of clean-up to prevent accidental duplicate prescriptions and to make it easier to add and delete meds. To create your own customized list.
- New built-in fax driver now lets you fax prescriptions to pharmacies. You will be able to add your scanned signature to your faxes following our next database update.

Authorizations

- Enter 'Multi' as a CPT code at the **Customization Screen** and then select it at Authorizations Screen to have the authorization be applicable to any CPT code.

Posting

- We added a feature that allows you to predate postings, which can be selected in the **Binocular Button Dialog Box**. Note that once selected that date will be used for all postings until you reset it or log out. If you want to predate payments make sure that you use the August 19 Update to update the program for this.
- Non-profit offices commonly use 'Adjustments' from Funds to reimburse patients. A feature was added to allow you to do this at the **Posting Screen** or at the **Accounts | Patient's Bills Screen**. Use **View | Adjustments** on the popup menu over the **Appointments Calendar** to set this up for selected patients so that it will be automatic when posting visits.

June 2004

Appointments

- With the Binocular button, auto-book appointments with one click!
- New button **Full** above Appointments grid -- expand grid to full screen with one touch! Great for "at a glance" views of daily activity in a large office. (Click **Full** again to resume the normal grid size)
- Not accepting new clients ... but want to retain data on potential new ones? Create a waiting list. Complete the **Patients** [**Clients**] screen as always, then on the Appointments grid right-click anywhere and select **Wait List - View** to bring up the Waiting for Appointments popup grid. Then drag the patient name from the blue dropdown and drop it into the grid. When you're ready to accept the new patient, bring up the Waiting for Appointments grid, select the name and right-click **Delete**.
- Memorialize follow-up appointments on the Notelet.
- Want to prepare statements of service for a group of patients? Now you can print SoSs in advance. For each patient, select the appointment, right-click, then select **Preprint SoSs/Superbills**. Right-click **& Autopost** lets you print the SoS and immediately post the appointment. **Print Only** prints the SoS and lets you post the appointment later.

Prescriptions

- Want to add comments on prescriptions? On the **Prescriptions** screen select the patient and the prescription. Enter comments on the **Comments and Lab Requests** box beneath the Prescriptions grid. To the right of this box click **Print** or **Record** for the comment either to appear on the prescription itself, or to be recorded on the grid. To comment on a previously written prescription, select that prescription on the grid, enter comment/request in the **Comments and Lab Requests** box, then click **Record**. To view all comments, right-click anywhere on the grid **Comments ... View**.
- We can add script formats and templates specific to your state. See the **Formats** dropdown -- if you don't see what you need, fax us the script and we'll add it!

Notes/Reports

- A search engine lets you quickly locate words or logical combination of several words.

- Insert diagnoses, treatment plans and current meds (with comments!) directly into a medical record.

Insurance

- You can now designate insurance plans at the individual patient/client level. On the **Orgns/Plans** screen, click the **Plans** tab. The new radio button **By Patient** moves the benefit details from this screen to a new tab **By Patient** on the **Insurance** screen. Now you don't have to make up a plan name which serves only single patients.

Transactions

- Need to correlate diagnoses with demographics? Click **Transactions ... Patient Profiles** to generate and customize tables.
- We've enhanced the **Transactions** screen to permit other analyses. In addition to the familiar Accounts profile and Patient Profiles mentioned above, **Releases** tracks health information releases requested and/or granted by date. And **User Access** identifies TheraManager sessions by user (important for HIPAA). Want additional analysis tools? Contact us!

General

- Taking work out of the office? Now you can restore your backed-up files without resorting to WinZip. From the main screen, click **File ... Restore Database**. Specify the target data folder (where you want the database to go), then specify the source of the zipped data backup, then click **Restore**.