What's New in 9.5.09-9.5.24

December

2016

This document was developed by Genius Solutions to introduce users to the features/modifications that have been released in 9.5.09 - 9.5.24 of eTHOMAS. Click on the text or page numbers within the Contents page to be brought to that specific item within the document.

eTHOMAS

Contents

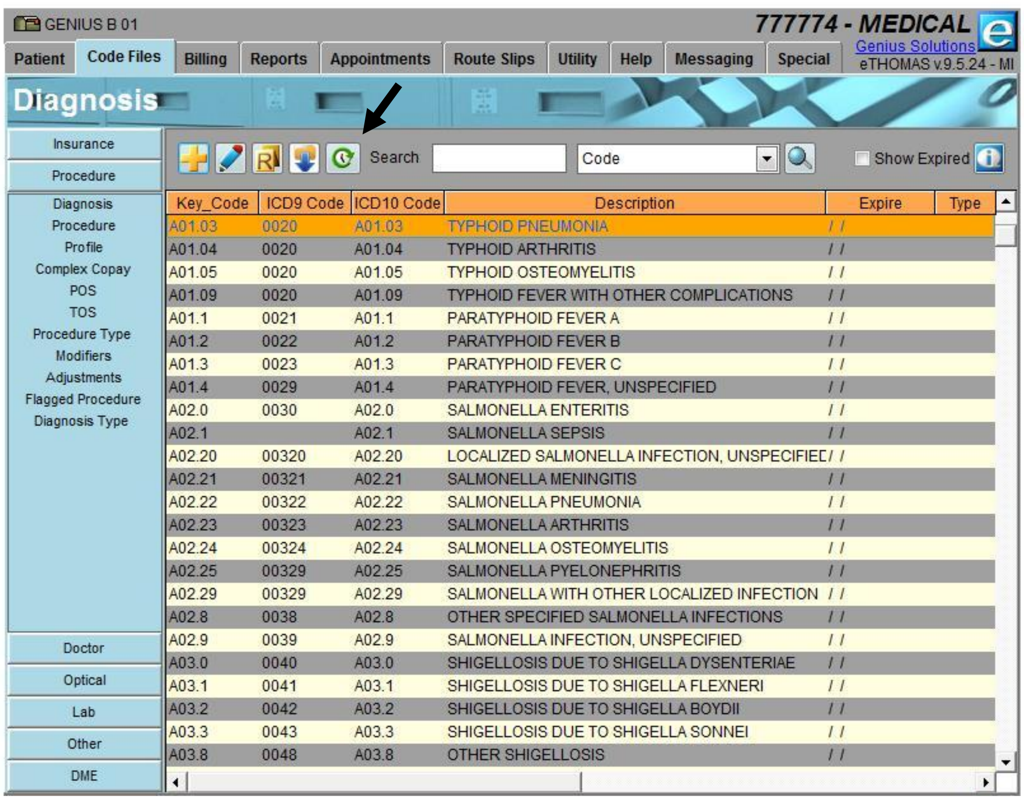
Release Introduction

Since our release of version 9.5.08 at the end of September 2015, we have made significant changes to eTHOMAS that we feel are of benefit to our users. Because of the number of modifications and the impact on our end-users, we have put together a document to outline these features. Our latest version, at the time of this publication, is version 9.5.24. In order to take full advantage of the features outlined within this document, eTHOMAS will need to be updated to that version. Verify your version number by looking in the right corner of eTHOMAS.

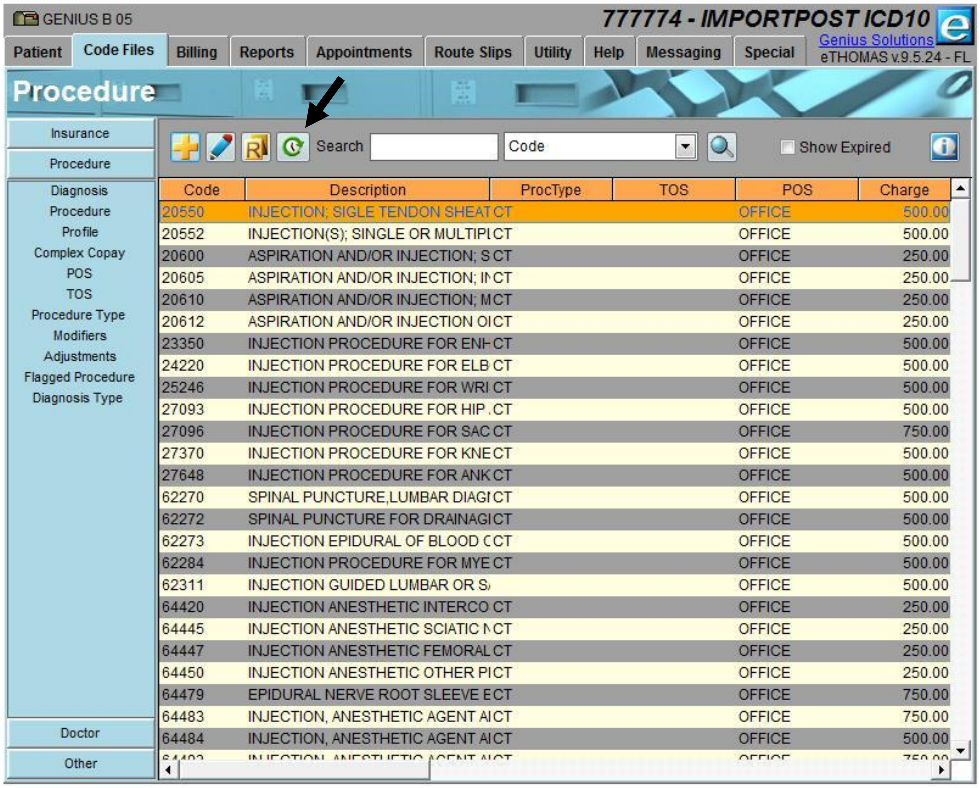
Code Files

Syncing Diagnosis and Procedure Codes (9.5.22)

The ability to sync diagnosis codes and procedure codes from eTHOMAS to ehrTHOMAS has been added to eTHOMAS. This feature is useful so that changes to these codes only have to be made in eTHOMAS and with the click of a button will also be made in ehrTHOMAS. This prevents the user from having to add/edit information in both systems. To Sync data from eTHOMAS to ehrTHOMAS, click the "Sync data with ehrTHOMAS" button. Procedure and Diagnosis codes must be synced individually.



Diagnosis Code File



Procedure Code File

If you are interested in learning more about purchasing ehrTHOMAS, please contact Genius Solutions at 586-751-9080 (out-of-Michigan: 800-645-0955) or email us at Sales2@geniussolutions.com.

Searching Diagnosis and Procedure Codes (9.5.11)

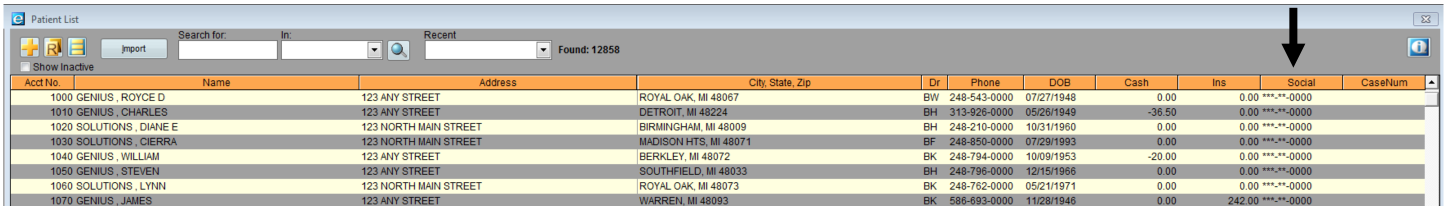
To enable easier look-up of Procedure and Diagnosis codes, a new System Setting called CodeListStart has been created. This setting will work in the search boxes of the Procedure Code and Diagnosis Code file list boxes. If the System Setting has a value of 1, the cursor will default to the search box. If the System Setting has a value of 2, the cursor will default to the list of codes.

Insurance Codes (9.5.14)

Insurance Codes may now be searched by Address in addition to Code and Name. Use the drop-down menu to select either Code, Name, or Address to begin a search.

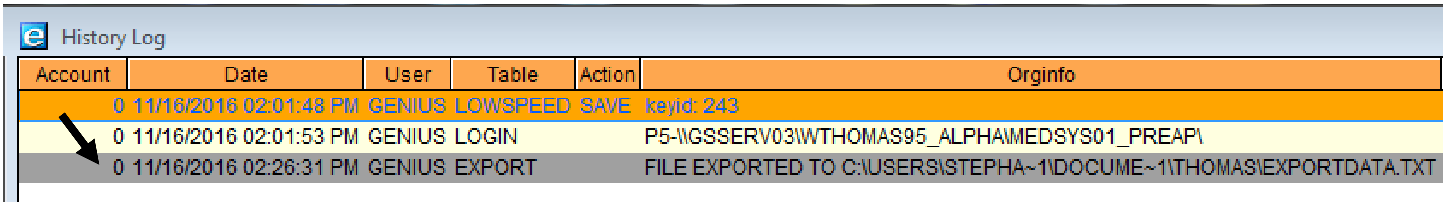
Security (9.5.14)

The security on the Patient List and Patient List printout has been improved to display only the last four digits of the Patient's Social Security Number in ***-**-XXXX format. The searching capabilities within the Patient List remain the same.



Acct No.	Name	Address	City, State, Zip	Dr	Phone	DOB	Cash	Ins	Social	CaseNum
1000	GENIUS , ROYCE D	123 ANY STREET	ROYAL OAK, MI 48067	BW	248-543-0000	07/27/1948	0.00	0.00	***-**-0000	
1010	GENIUS , CHARLES	123 ANY STREET	DETROIT, MI 48224	BH	313-926-0000	05/26/1949	-36.50	0.00	***-**-0000	
1020	SOLUTIONS , DIANE E	123 NORTH MAIN STREET	BIRMINGHAM, MI 48009	BH	248-210-0000	10/31/1960	0.00	0.00	***-**-0000	
1030	SOLUTIONS , CIERRA	123 NORTH MAIN STREET	MADISON HTS, MI 48071	BF	248-850-0000	07/29/1993	0.00	0.00	***-**-0000	
1040	GENIUS , WILLIAM	123 ANY STREET	BERKLEY, MI 48072	BK	248-794-0000	10/09/1953	-20.00	0.00	***-**-0000	
1050	GENIUS , STEVEN	123 ANY STREET	SOUTHFIELD, MI 48033	BH	248-796-0000	12/15/1966	0.00	0.00	***-**-0000	
1060	SOLUTIONS , LYNN	123 NORTH MAIN STREET	ROYAL OAK, MI 48073	BK	248-762-0000	05/21/1971	0.00	0.00	***-**-0000	
1070	GENIUS , JAMES	123 ANY STREET	WARREN, MI 48093	BK	586-693-0000	11/28/1946	0.00	242.00	***-**-0000	

In addition, an item will be logged in the History Log as "Export" and the path exported when Patients are exported from the Patient List. This information is useful to keep track of when patient identifiable information is exported out of eTHOMAS.



Account	Date	User	Table	Action	Orginfo
0	11/16/2016 02:01:48 PM	GENIUS	LOWSPEED	SAVE	keyid: 243
0	11/16/2016 02:01:53 PM	GENIUS	LOGIN		P5-\\GSSERV03\WTHOMAS95_ALPHA\MEDSYS01_PREAP\
0	11/16/2016 02:26:31 PM	GENIUS	EXPORT		FILE EXPORTED TO C:\USERS\STEPHA~1\DOCUME~1\THOMAS\EXPORTDATA.TXT

ICD10

Patient Receipts (9.5.10)

The ICD-10 diagnosis code(s) will now print for all receipt types.

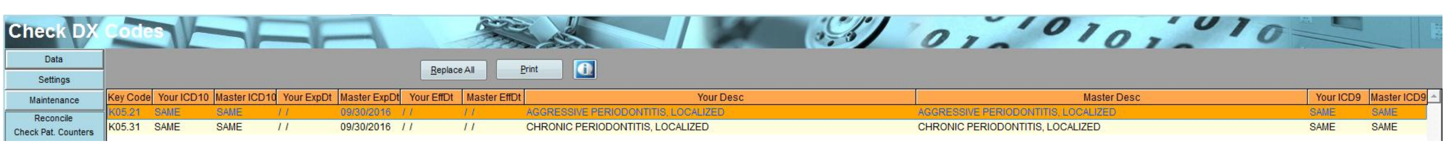
Guarantor:
JOHN SMITH
123 MY PLACE
DETROIT, MI 48221

Patient:
CLAUDE GENIUS
123 ANY STREET
DETROIT, MI 48221-1659

DOS	Name	Proc	Description	DX	Qty	Charge	Account Activity Insurance	Patient
11/15/2016	CLAUDE	99213	OFFICE VISIT EXPANDED	N30.41	1.00	92.00	82.00	10.00
11/15/2016	CLAUDE	PATPAY	PATIENT PAYMENT-THANK Cash-		1.00	0.00	0.00	-5.00
					Total Charges	92.00	82.00	10.00
					Previous Balance		0.00	44.37
					Today's Total Payments			5.00
					New Balance		82.00	49.37

Check DX Codes (9.5.21)

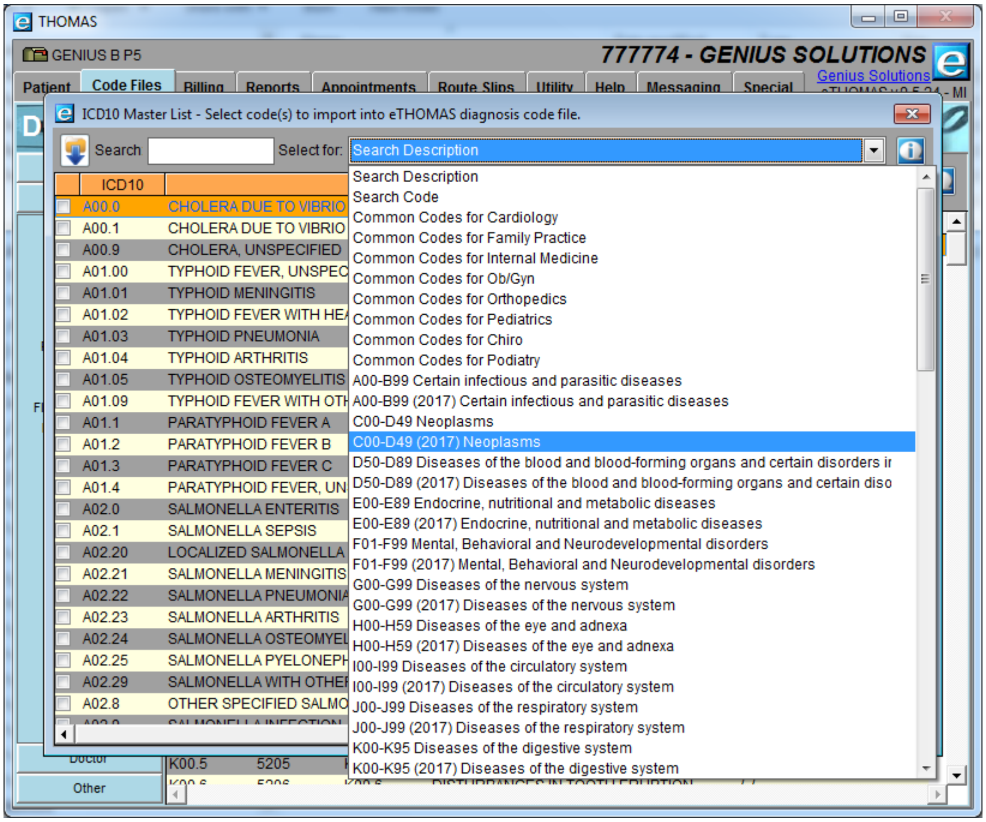
Under Utility | Maintenance | Check DX Codes, when a code is expired we will now display the code description. This allows users to easily identify the code that has expired.



Key Code	Your ICD10	Master ICD10	Your ExpDt	Master ExpDt	Your EffDt	Master EffDt	Your Desc	Master Desc	Your ICD9	Master ICD9
K05.21	SAME	SAME	/ /	09/30/2016	/ /	/ /	AGGRESSIVE PERIODONTITIS, LOCALIZED	AGGRESSIVE PERIODONTITIS, LOCALIZED	SAME	SAME
K05.31	SAME	SAME	/ /	09/30/2016	/ /	/ /	CHRONIC PERIODONTITIS, LOCALIZED	CHRONIC PERIODONTITIS, LOCALIZED	SAME	SAME

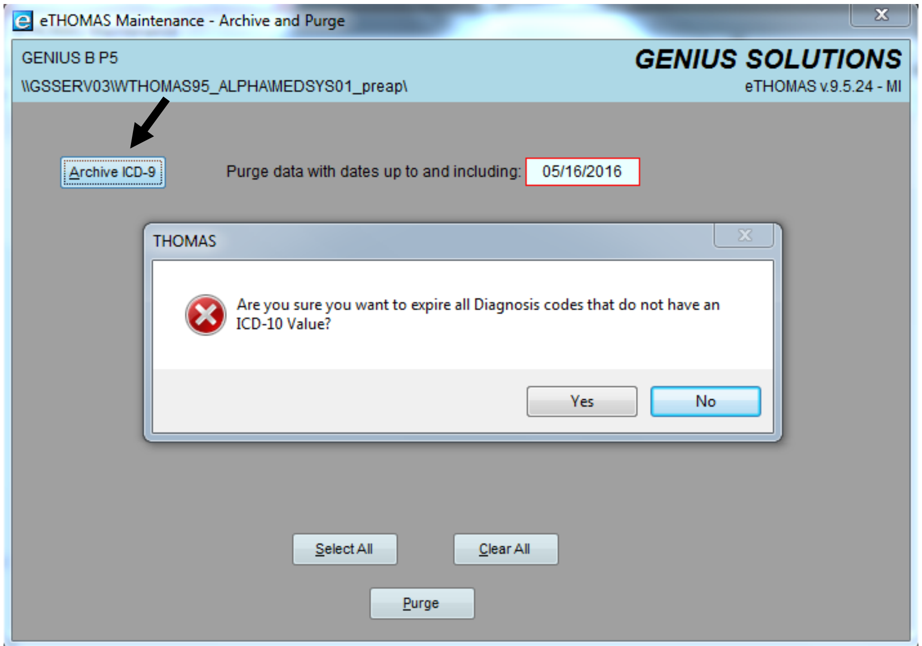
New ICD10 Codes (9.5.21)

The program has been updated to include ICD10 diagnosis code list for fiscal year 2017. From the ICD10 Master List, accessed through Code Files | Procedure | Diagnosis, users select new codes by using the “Select for” drop-down menu. By default, the Select for is Search Description. From the drop-down, choose the category without “2017” next to it will include all codes in that category, including new codes for 2017. Choose the category with “2017” next to it to see get a list of just the new codes for 2017. Improvements were made to the ICD10 master list to include the expiration date and effective date that are contained in this file.

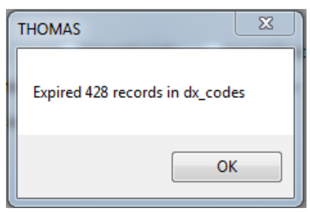


Purge and Archive (9.5.11)

An "Archive ICD-9" button has been added to the eTHOMAS Maintenance utility in the Purge and Archive area. When this button is selected, diagnosis codes that do not have a value in the "ICD-10 Code" and do not have an Expiration date will add an Expiration of 10/01/2015. Click Yes to expire the codes. Click No to quit the expiration process.



Once the program has finished, a message will appear with how many codes were expired.



These expired codes may still be accessed by using the "Show Expired" checkbox from within the Diagnosis Code file.

The Maintenance Program is typically accessed by the manager of the office. No one can be in the medsys directory of eTHOMAS when you are accessing the Maintenance Program. There is typically a shortcut to the Maintenance Program on the eTHOMAS Server (main computer). Genius Solutions recommends that you backup your eTHOMAS system prior to using the Maintenance Program.

HealthCare Referral Forms (9.5.11)

The HealthCare Referral Form (Patient | Utility | Patient Referrals) has been modified to accommodate the ICD-10 diagnosis code.

HealthCare Referral Form

GENIUS SOLUTIONS - REQUEST FOR REFERRAL

Date Written 11/15/2016 **Revised Referral** ☐ Printed on 11/15/2016 Tuesday 15:22:42

Patient Name GENIUS, CLAUDE **Birthdate** 02/05/2010
Member Id# XYL900001536
Plan Name MEDICARE PLUS BLUE

Check if Applicable ☐ **Worker's Comp** ☐ **Auto Accident**

To: REFERRAL COORDINATOR	FROM:
PCP Name: DONALD DUCK	**Provider Name:** MICKEY MOUSE
Tax Id:	**Tax Id:** 333223333
Plan Assigned Id:	**Plan Assigned Id:**
Phone Number: 586-751-9080	**Address:** 7177 MILLER DRIVE WARREN MI 48092
Fax Number:	**Phone Number:** 586-751-9080
	Fax Number:

Dx Code: A12.345 **Start Date:** / / **End Date:** / /

Location: ☒ **Provider's Office** ☐ **Outpatient Hospital** ☐ **ER/UCC**
Facility No#: **Facility Name:**
Date of Service: ______________

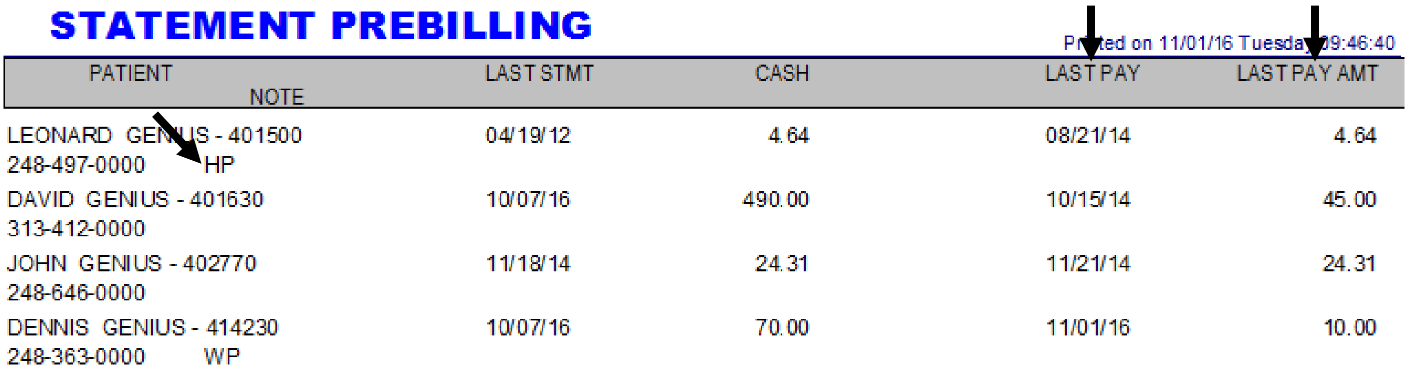
Statements

Several changes have been made to patient statements. They are outlined below.

Statement Prebilling Report (9.5.24)

Changes have been made to the Statement Prebilling report. These changes include:

- The system setting STMTPREBILLPHONE has been updated. If it is active with a value of 1, the patient's preferred method of contact, as well as the corresponding contact information will be on the statement prebilling report. The Preferred Method of Contact will display as follows:
  - HP = Home Phone
  - WP = Work Phone
  - CP = Cell Phone
  - OP = Other Phone
  - EM = Email
  - TX = Text/SMS
  - PM = Post Mail (patient's post mail address will not print on the report)
- The prebilling report will no longer separate by doctor.
- The prebilling report will now print out in the same order you choose to prepare statements.
- The last patient payment date and last patient payment amount are now included on the prebilling report.



STATEMENT PREBILLING

Printed on 11/01/16 Tuesday 09:46:40

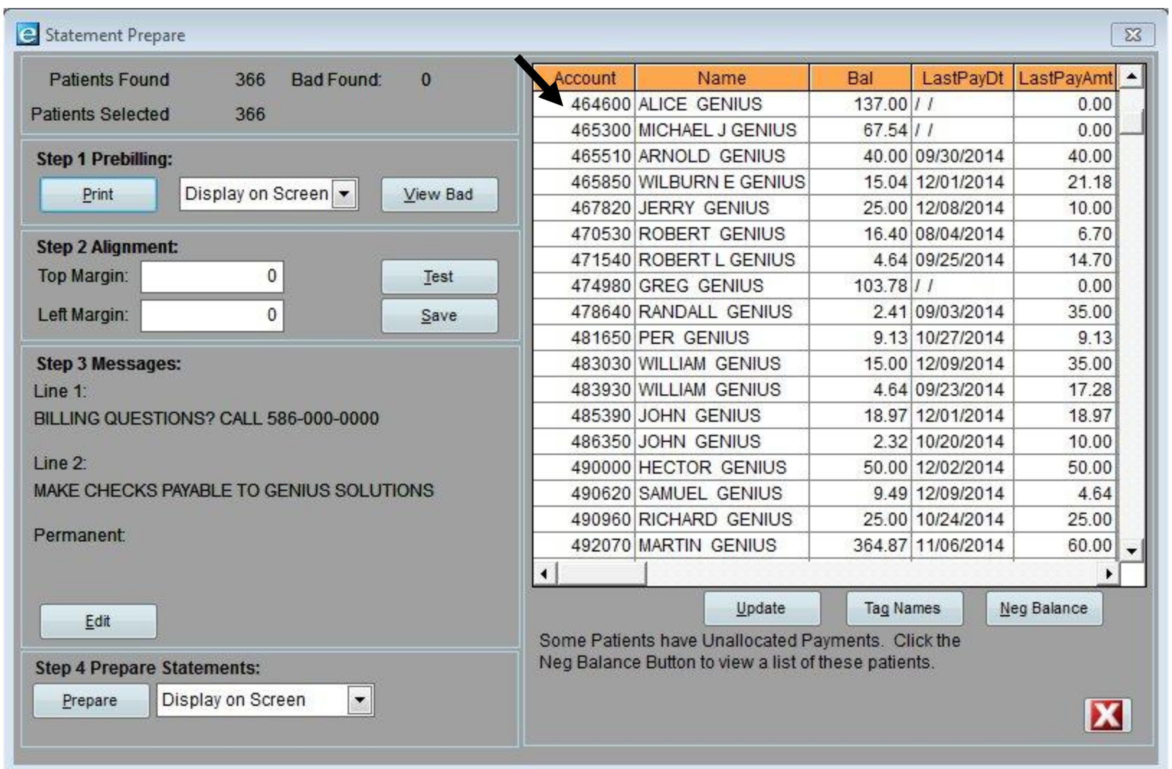
PATIENT	NOTE	LAST STMT	CASH	LAST PAY	LAST PAY AMT
LEONARD GENIUS - 401500 248-497-0000	HP	04/19/12	4.64	08/21/14	4.64
DAVID GENIUS - 401630 313-412-0000		10/07/16	490.00	10/15/14	45.00
JOHN GENIUS - 402770 248-646-0000		11/18/14	24.31	11/21/14	24.31
DENNIS GENIUS - 414230 248-363-0000	WP	10/07/16	70.00	11/01/16	10.00

Cycle Statements (9.5.24)

Cycle statements allow you to prepare statements for patients that have had new activity posted to their account since their last statement. This includes charges, payments, transfer balances, debits and credits. This can be used in conjunction with Min Days Since Last Stmt. Enter the number of days since the patient has received their last statement. This will pull any patients who have not received a statement in the designated number of days.

EXAMPLE

The following patient statements were generated on November 1st.



Statement Prepare

Patients Found 366 Bad Found: 0

Patients Selected 366

Step 1 Prebilling:

Print | Display on Screen | View Bad

Step 2 Alignment:

Top Margin: 0 | Test

Left Margin: 0 | Save

Step 3 Messages:

Line 1:

BILLING QUESTIONS? CALL 586-000-0000

Line 2:

MAKE CHECKS PAYABLE TO GENIUS SOLUTIONS

Permanent:

Edit

Step 4 Prepare Statements:

Prepare | Display on Screen

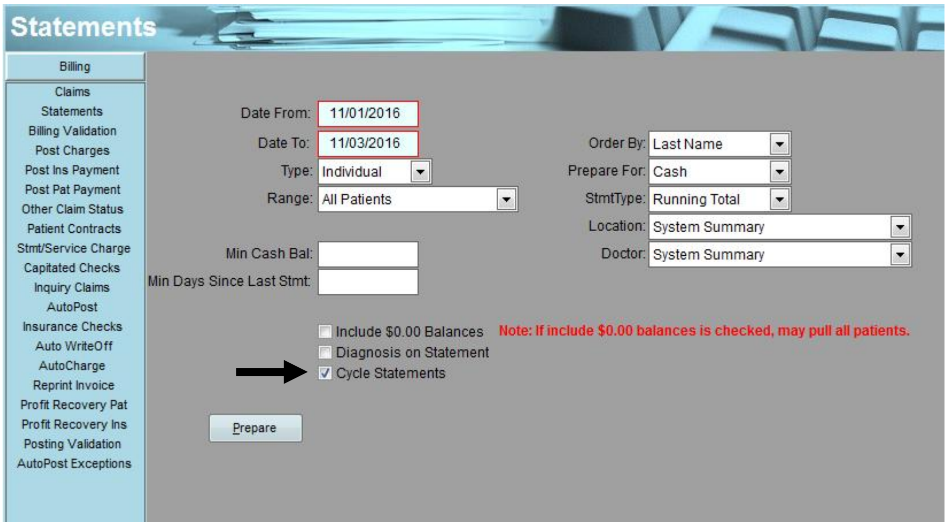
Account	Name	Bal	LastPayDt	LastPayAmt
464600	ALICE GENIUS	137.00	/ /	0.00
465300	MICHAEL J GENIUS	67.54	/ /	0.00
465510	ARNOLD GENIUS	40.00	09/30/2014	40.00
465850	WILBURN E GENIUS	15.04	12/01/2014	21.18
467820	JERRY GENIUS	25.00	12/08/2014	10.00
470530	ROBERT GENIUS	16.40	08/04/2014	6.70
471540	ROBERT L GENIUS	4.64	09/25/2014	14.70
474980	GREG GENIUS	103.78	/ /	0.00
478640	RANDALL GENIUS	2.41	09/03/2014	35.00
481650	PER GENIUS	9.13	10/27/2014	9.13
483030	WILLIAM GENIUS	15.00	12/09/2014	35.00
483930	WILLIAM GENIUS	4.64	09/23/2014	17.28
485390	JOHN GENIUS	18.97	12/01/2014	18.97
486350	JOHN GENIUS	2.32	10/20/2014	10.00
490000	HECTOR GENIUS	50.00	12/02/2014	50.00
490620	SAMUEL GENIUS	9.49	12/09/2014	4.64
490960	RICHARD GENIUS	25.00	10/24/2014	25.00
492070	MARTIN GENIUS	364.87	11/06/2014	60.00

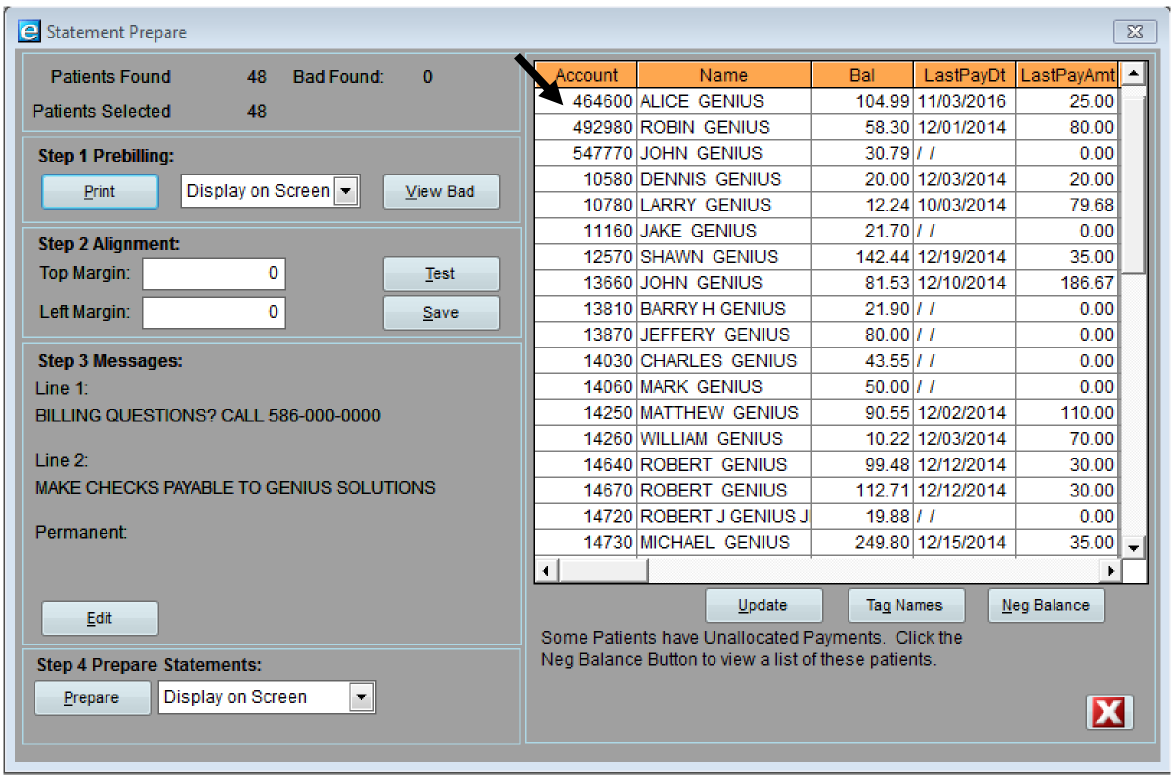
Update | Tag Names | Neg Balance

Some Patients have Unallocated Payments. Click the Neg Balance Button to view a list of these patients.

Statements Prepared on Nov. 1st

By November 3rd there are many patients with new charges, payments or transfer balances (TRABAL) that have been added to their accounts. Instead of waiting until the next month to send a statement to this patient, you can run Cycle Statements. This feature will generate statement only for patients who have had new activity since their last statement.





Statements Prepared on Nov. 3rd

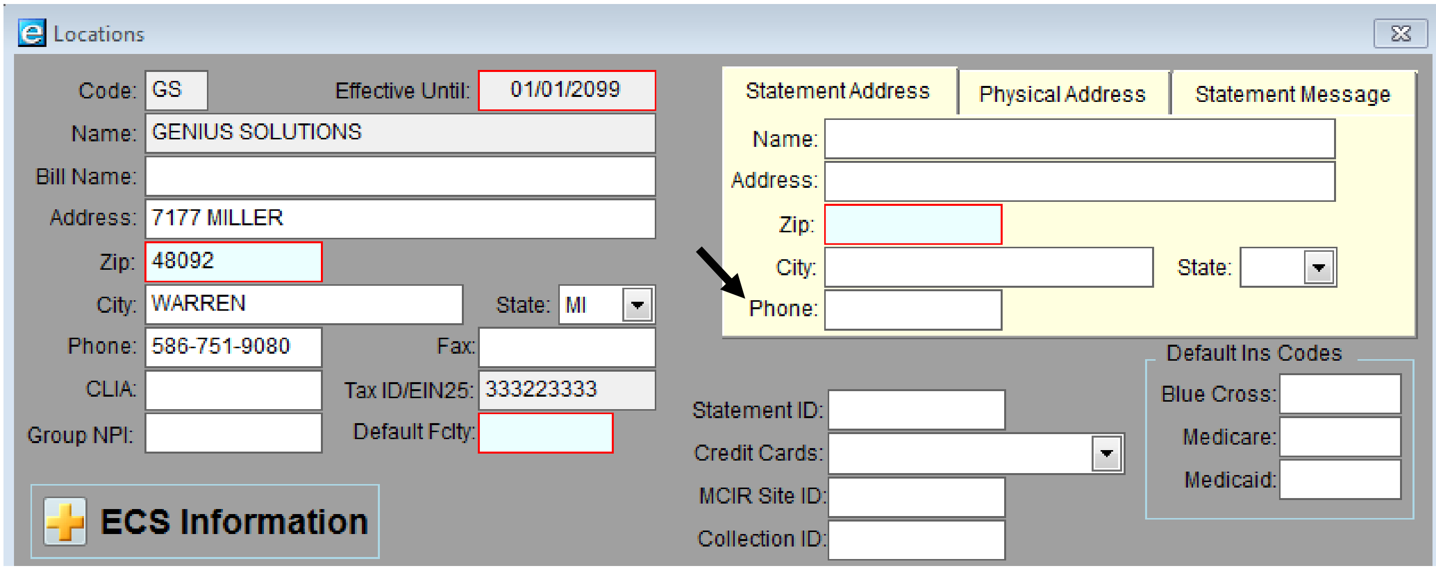
For Running Totals, the patient must have new activity within the To and From date range, as well as activity since their last statement. This does not apply to other statement types, as they will gather data based only on the last statement date.

EXAMPLE

If the patient's last statement was on November 1st and there was new activity on November 2nd, then November 2nd must be included in the "Date From" field when running statements. If it is run from November 3rd, it will not find that patient because there is no new activity within the date range.

Alternate Phone Number (9.5.24)

Users may now enter an alternate phone number in the Statement Address from the Location (Utility | Data | Locations) to appear on patient statements. If the Statement Address and phone number are filled in the alternate phone number will appear on Patient Statements. If the Phone Number is not filled in the system uses the Phone Number from the Location. **The Phone Number is used in conjunction with the Statement Address and not by itself.**



Payment Methods (9.5.24)

Patient statements will now display the payment method attached to each payment.

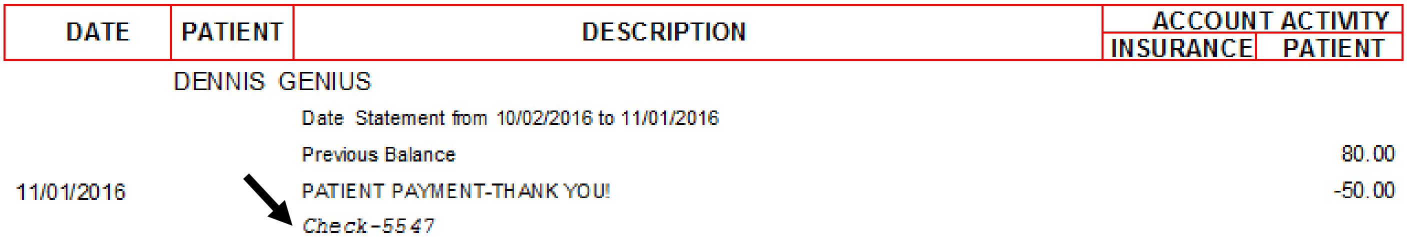
Insurance Payments

Insurance payments will now display name of the insurance company that made the payment. The insurance name will display whatever is in the Name field in the insurance code. The insurance name is displayed just before the check number. To display insurance payments, you must run statements by Cash/Insurance.

DATE	PATIENT	DESCRIPTION	ACCOUNT ACTIVITY INSURANCE	ACCOUNT ACTIVITY PATIENT
	MARY D SOLUTIONS			
		Date Statement from 10/02/2016 to 11/01/2016		
		Previous Balance		3.29
10/15/2016		99212 EP PROBLEM FOCUSED	65.00	
11/01/2016		INSURANCE PAYMENT *MEDICARE PLUS BLUE-CHECK#1234*	-44.92	
11/01/2016		PARTICIPATING ADJUSTMENT	-20.08	

Patient Payments

Patient payments will now display the payment type, along with any reference information (check number, for example).

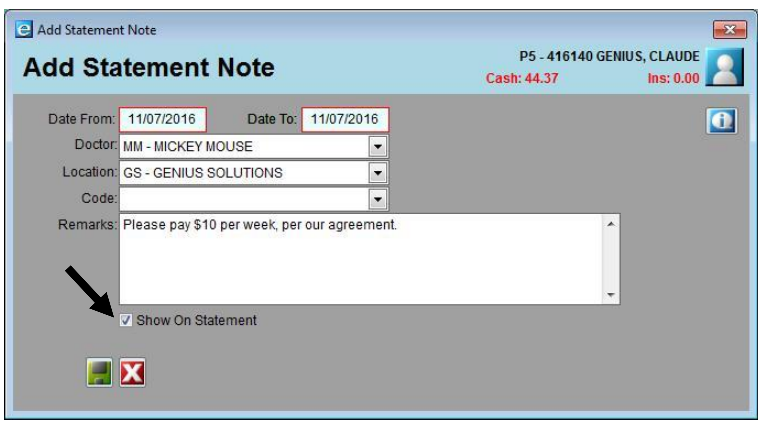


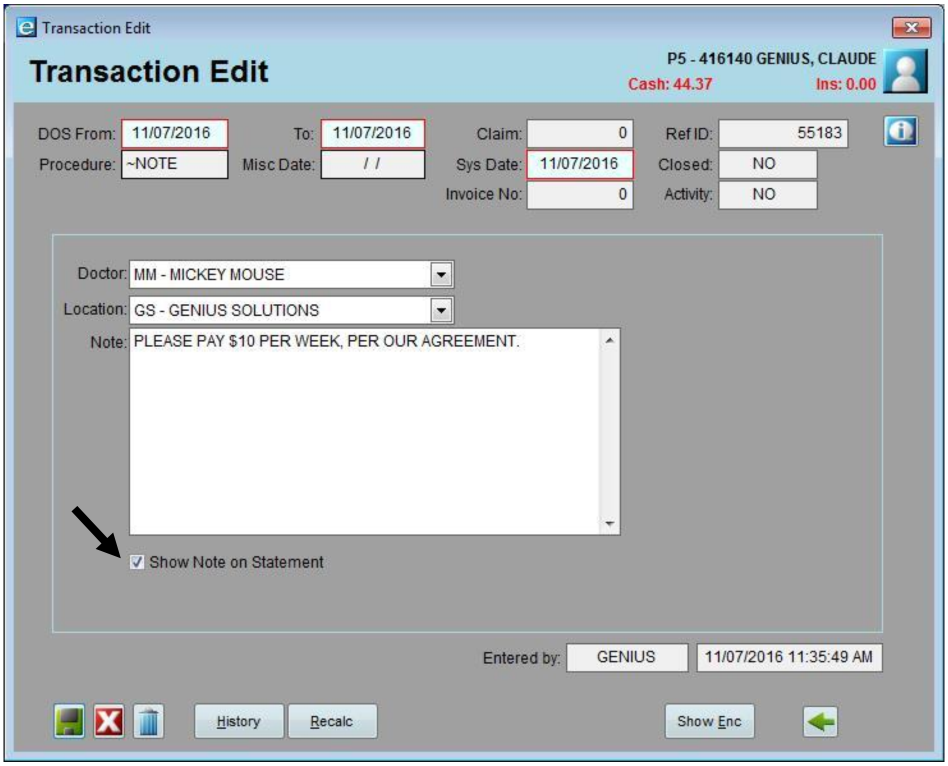
DATE	PATIENT	DESCRIPTION	ACCOUNT ACTIVITY INSURANCE	ACCOUNT ACTIVITY PATIENT
	DENNIS GENIUS			
		Date Statement from 10/02/2016 to 11/01/2016		
		Previous Balance		80.00
11/01/2016		PATIENT PAYMENT-THANK YOU!		-50.00
		Check-5547		

Statement Notes (9.5.13)

The Stmt Note button has been added to the Post Insurance Payment screen. The Statement Note will add an additional line on the Transaction Ledger and on the Statement (if Show on Statement is checked). If the Date From on the stmt note falls within the Date From and Date To of the Statement then the note will be put on the statement. The Stmt Note will use the Procedure Code ~NOTE. Add the Procedure Code ~NOTE if it is not in the Procedure Codes (Code Files | Procedure | Procedure).

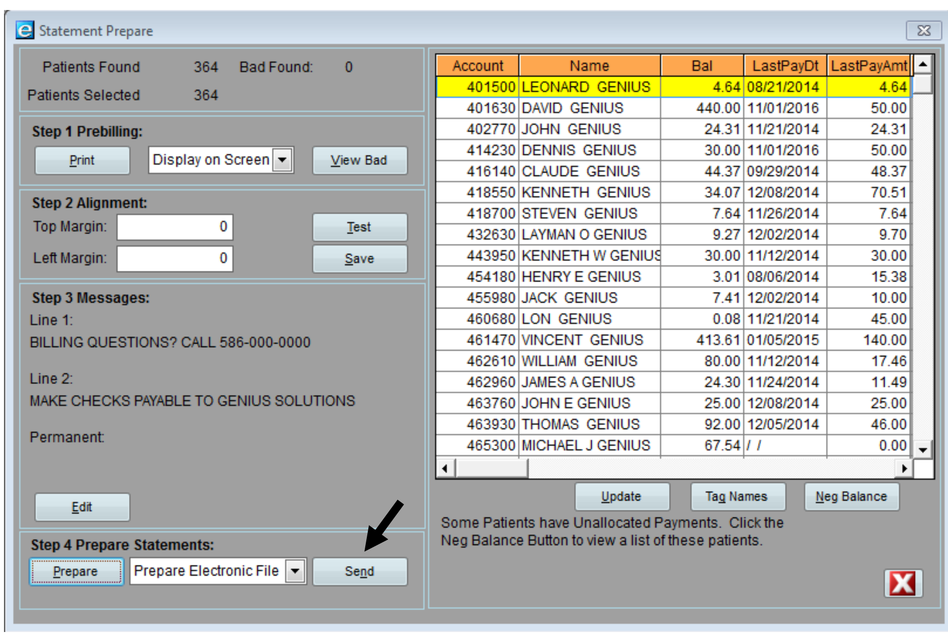
Statement notes will now print on Running Total, Open Items and Collection statement types. The system setting StmtShowReference must be activated with a value of 1. This will only display statement notes that have "Show Note on Statement" checked.



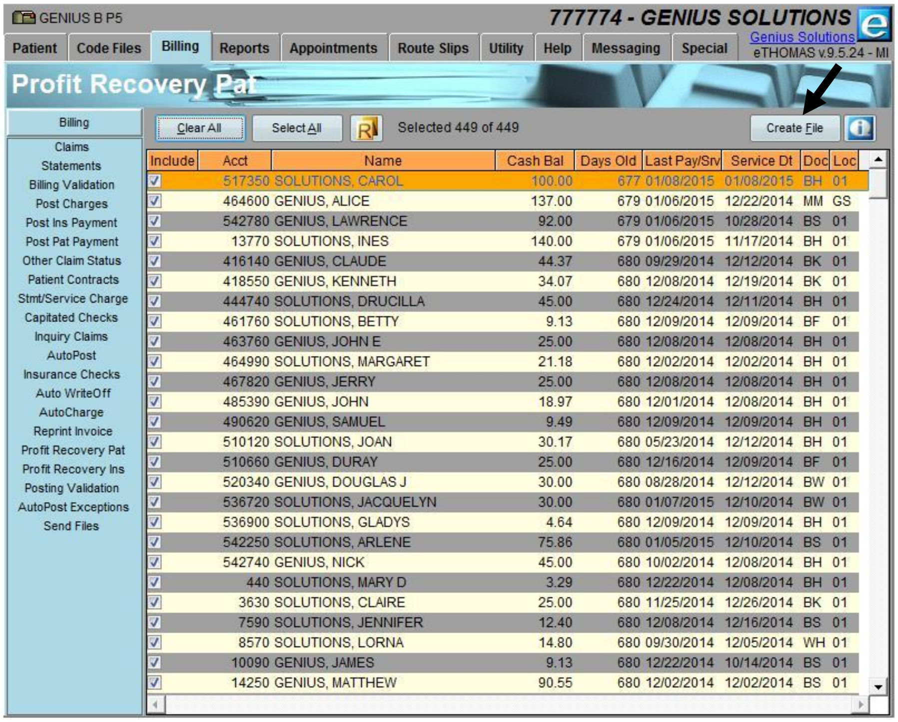


Electronic Statements via gsTransport (9.5.24)

Electronic Statements and Profit Recovery files can now be sent through GS Transport. When you click on the Send button within the Statement Prepare screen or the Create File button within the Profit Recovery screen, the program will no longer open the Data Sender program, but instead the file will automatically be sent through GS Transport.



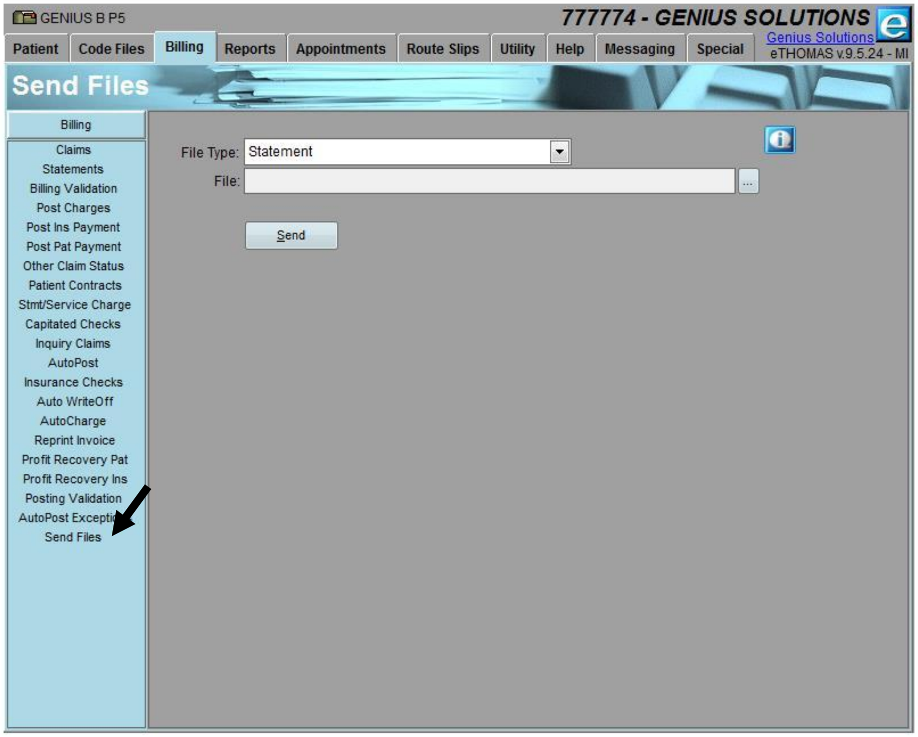
Prepare Statements Screen



Profit Recovery Screen

Send Files (9.5.24)

Send Files also allows users to send electronic files such as electronic statements or Profit Recovery files to Genius Solutions. This feature can be used if a file was unable to be sent to Genius Solutions at the time it was prepared. From the Billing tab, click on Send Files from the left menu. Under File Type, select the type of file to be sent. Next to File, click the browse button to select a file to send. Click the Send button to send the file to Genius Solutions.



Claim Detail Statements (9.5.24)

Changes have been made to the Claim Detail statements to provide greater readability. The changes have been outlined below:

- Claim Detail statements will now only print claims that have an outstanding cash balance on them.
- The claim number has been added to the statement for easy identification of each claim.
- Claim Detail can only be run by Location Summary and Doctor Summary. Additionally, you must run Claim Detail statements for Cash and Insurance balances.
- Items without a claim number will be displayed at the top of the statement. This includes patient debits (PATDEB) and statement service charges.
- Users will receive a prebilling message that says "Balance Discrepancy" on patients who have unallocated or invalid information in their ledger. It is recommended that you run system Reconcile and Find Unapplied prior to running Claim Detail statements. These options can be found under Utility | Maintenance.
- Patient payments and credits can be allocated to multiple claims. In this instance, the payment line will state that a "partial payment" with the amount that was applied to that claim.

DATE	PATIENT	DESCRIPTION		ACCOUNT ACTIVITY	
				INSURANCE	PATIENT
	DAVID GENIUS				
11/07/2014		PATIENT ACCOUNT DEBIT			100.00
04/02/2014		99213 OFFICE VISIT EXPANDED	ClaimNo: 3504		45.00
10/15/2014		PARTIAL PATIENT PAYMENT-THANK YOU!			-15.00
		Credit Card-502798			
04/23/2014		99212 OFFICE VISIT PROBLEM FOCUSED	ClaimNo: 4245		45.00

Billing

Quantity Decimals (9.5.12)

Changes have been made to the Quantity within eTHOMAS to accommodate different billing needs. Quantities greater than 999 but less than 10,000 may now be billed in eTHOMAS. Quantities including decimals can be used when using one of the following special indicators within the procedure code: ID-Include Decimal, N4-NDC in 5-4-2 format, and NR-NDC/Hemoglobin/Hematocrit/Creatin. If you try to enter a decimal on a procedure code that does not have one of these special indicators, you will receive a message that says "The Quantity cannot include a decimal". **You may only bill quantities greater than 999 and quantities with decimals electronically.** If the Quantity is over 999 and a paper claim is trying to be generated, users will receive a prebilling error message that says "Paper billing with large QTY".

The following reports have been adjusted to include the larger quantity:

- Daily Activities Report
- Procedure Summary Report
- Referral Procedure Summary Report
- Service History Report
- Sales Tax Report (2)
- Transaction Billing/Payment Report
- Service Analysis Report

Anesthesia Billing (9.5.14)

There have been some improvements to the Anesthesia Billing Module. View the Anesthesia Billing Module for more information http://www.media.geniussolutions.com/95/Anesthesia.pdf or access this information by clicking the "GS Documentation" link; select the "Anesthesia Billing Module" document.

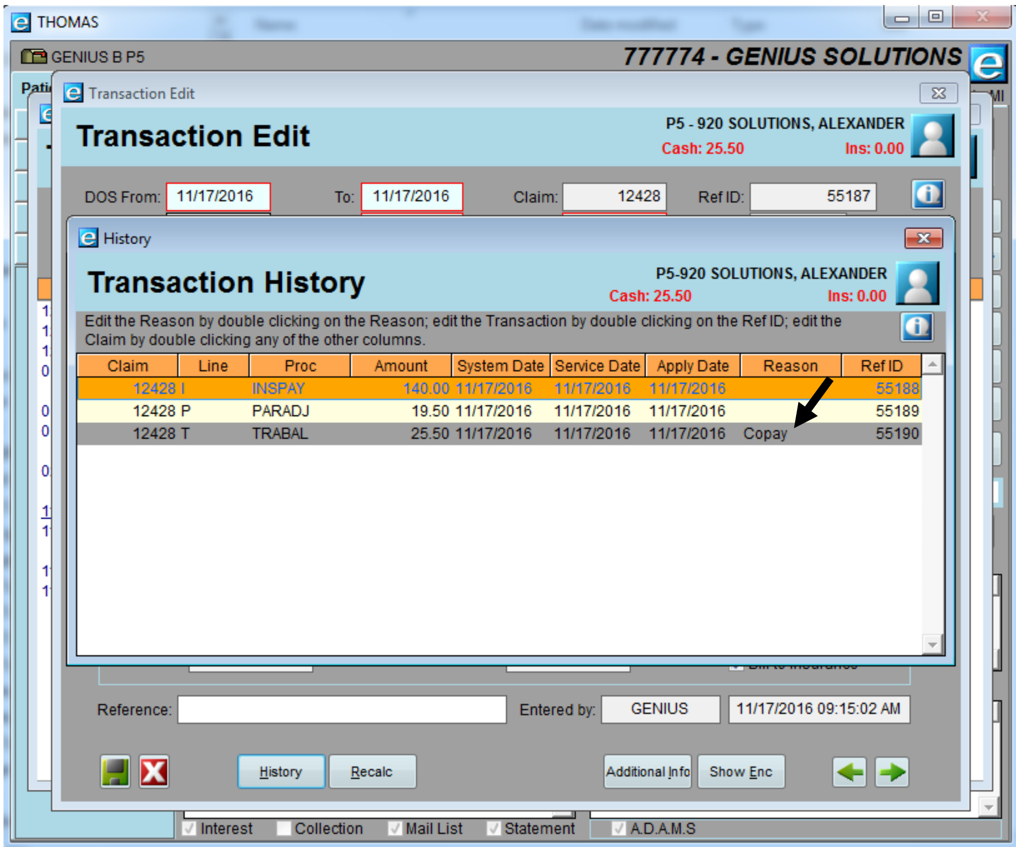
Claim Date (9.5.23)

A modification has been made to the Transaction and Claim Edit screens so that it cannot be saved if there is not a System Date. This is information is crucial for many reports within eTHOMAS to calculate properly.

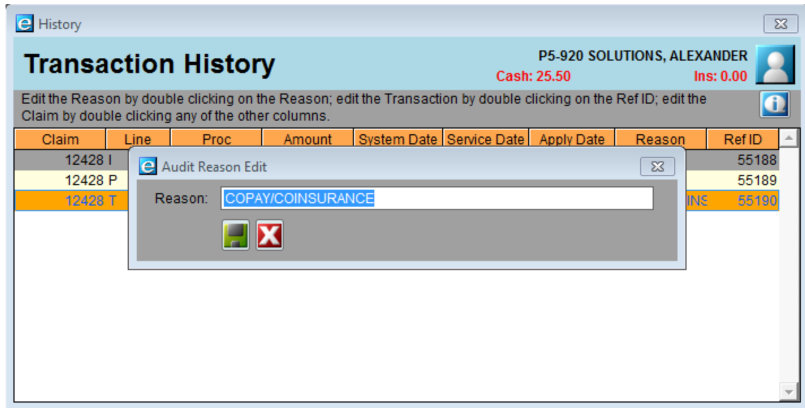
Editing Reason Codes (9.5.14)

The Audit Reason from the Post Insurance Payment may now be edited through the History of the Transaction Edit. Within the Audit Reason Edit, users may edit/modify/add up to 30 characters. This feature is useful if the incorrect reason is chosen at the time of posting, or if additional information needs to be added afterward.

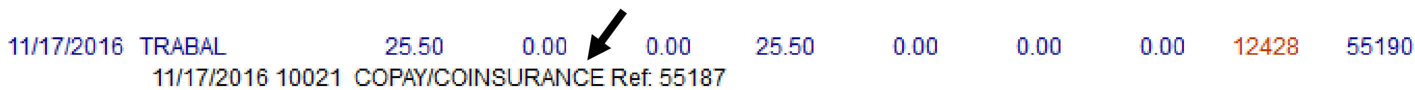
To access this information double click on the Reason column from Patient | Ledger > open the date of service > History button.



Edit the Reason and click Save to save the changes.

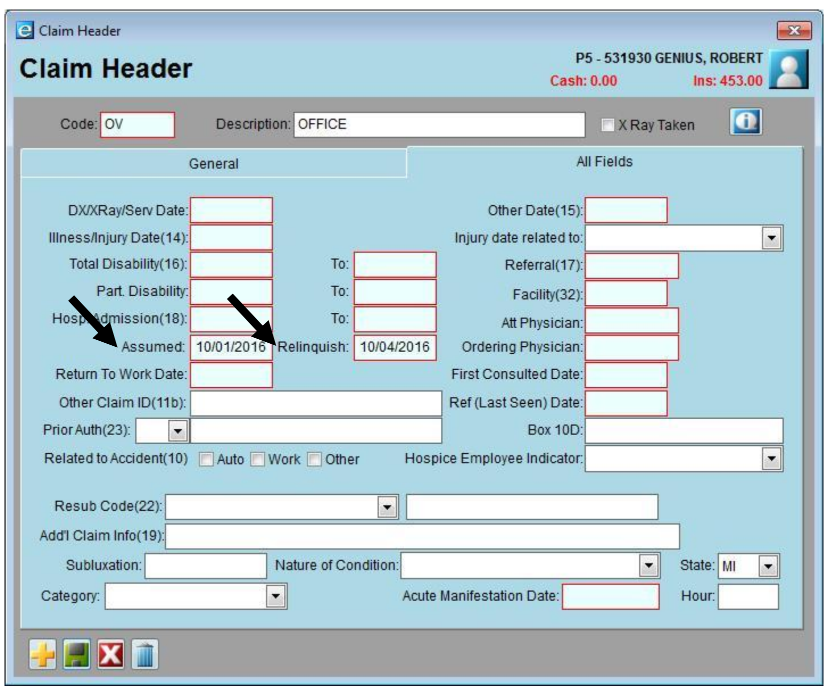


The ledger will reflect the updated information.



Assumed and Relinquish Dates (9.5.19)

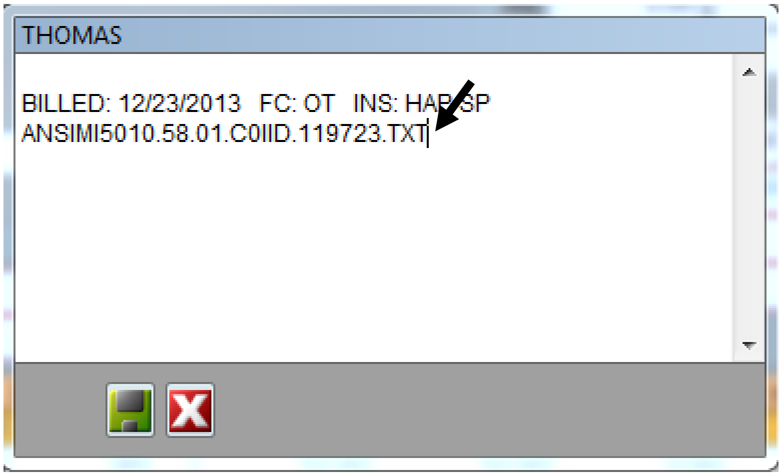
Two new date fields have been added to the claim header; Assumed and Relinquish dates. If used, will report in Loop 2300 DTP*090 (Assumed Date) and DTP*091 (Relinquish Date) of the 5010 electronic claim file. Enter the dates that the physician assumed and relinquished care for the patient. This is generally used for patients who are receiving post-operative care.



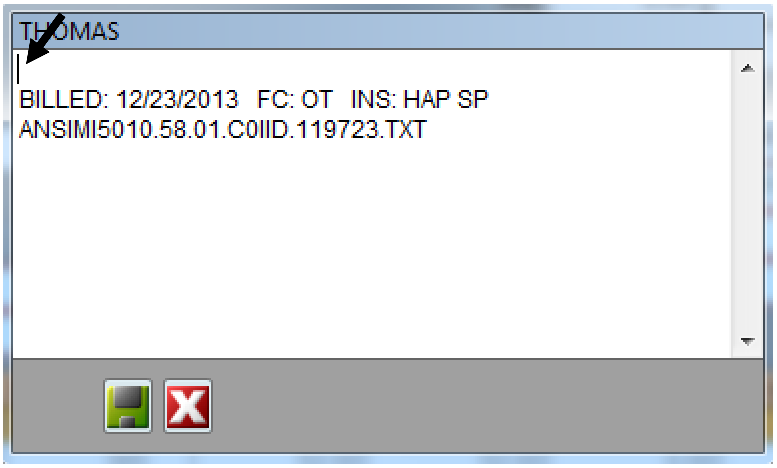
Claim Notes (9.5.24)

A new system setting has been created called NoteCursor. This setting will determine where the cursor will default in the Rpt Note, Claim Note and Ins Remark buttons within the Claim Information screen.

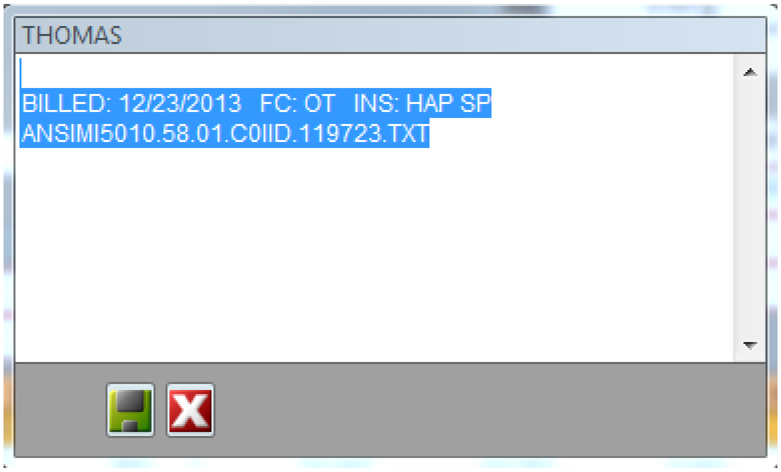
By default, the cursor will reside at the end of the note. With a value of 1, the cursor will default at the beginning of the note. With a value of 2, the note is highlighted upon entry.



Default



NoteCursor with a value of 1



NoteCursor with a value of 2

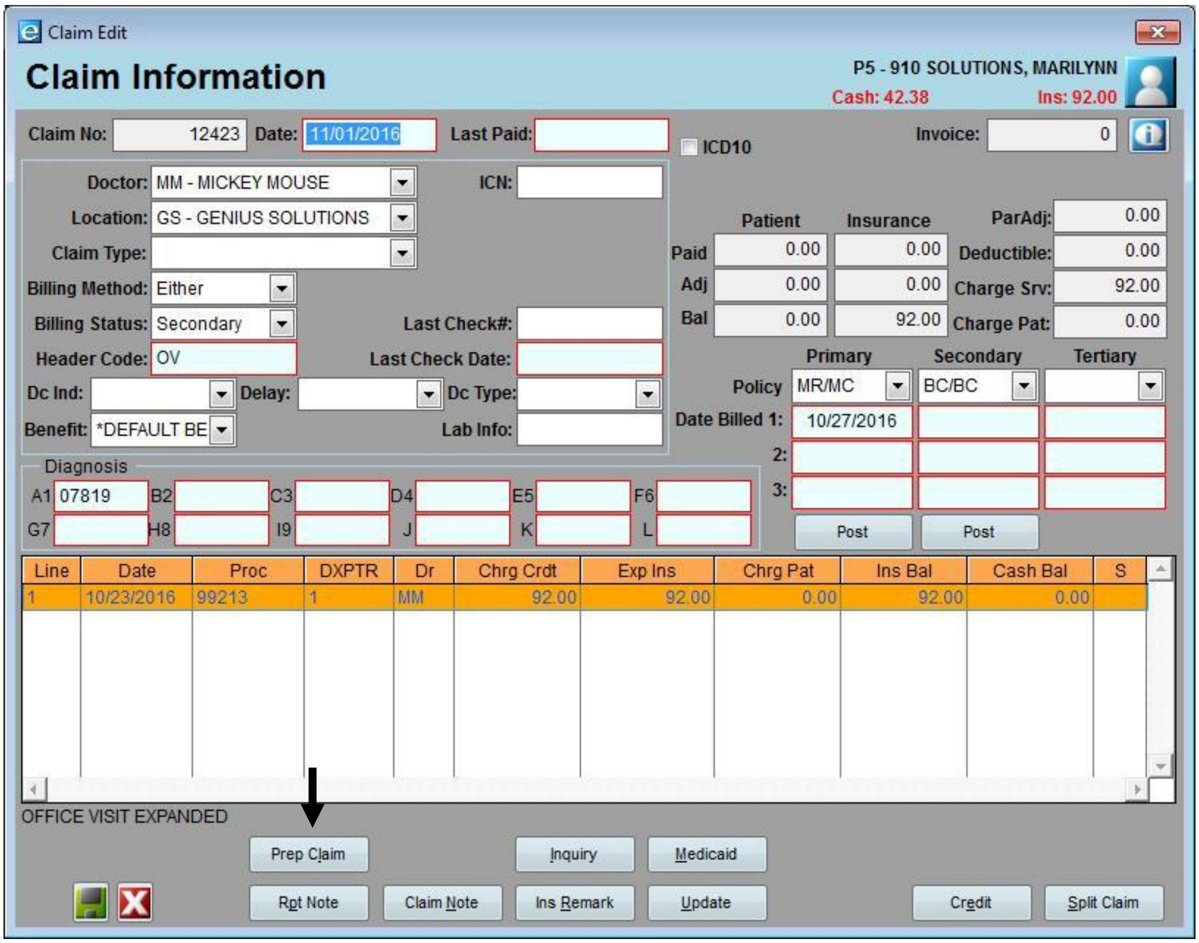
Expired Insurance Codes (9.5.20)

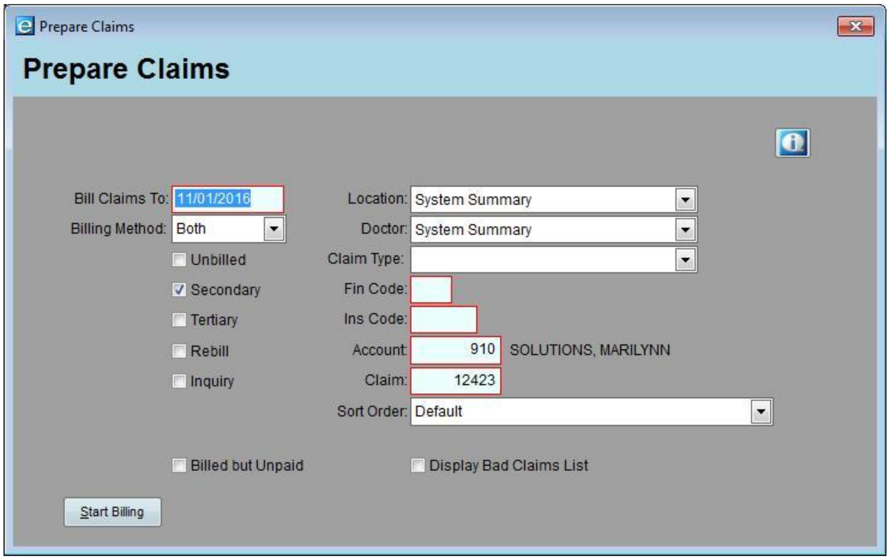
A modification has been made when an Insurance Code (Code Files | Insurance | Insurance) has been expired, the user will receive a Prebilling Warning that the Insurance Code is expired.

Name / Acct No	Claim#	From	To	Policy	Dr	Charge DX1	DX2
GENIUS, CALVIN P - 405270	12426	11/15/2016	11/15/2016	BC/BC	BS	92.00 1101	
WARN Insurance Code expired							

Prepare Claim from Claim Information (9.5.24)

You can now prepare a claim from the Claim Information screen. Clicking on the Prep Claim button will bring you to the Prepare Claims screen where a paper claim or electronic file can be generated for this claim. eTHOMAS will automatically enter in the patient's account number and claim number into the Prepare Claims screen for ease of use. The Prep Claim button will not be available if the claim is in one of the following statuses: Open, Complete, or Hold.

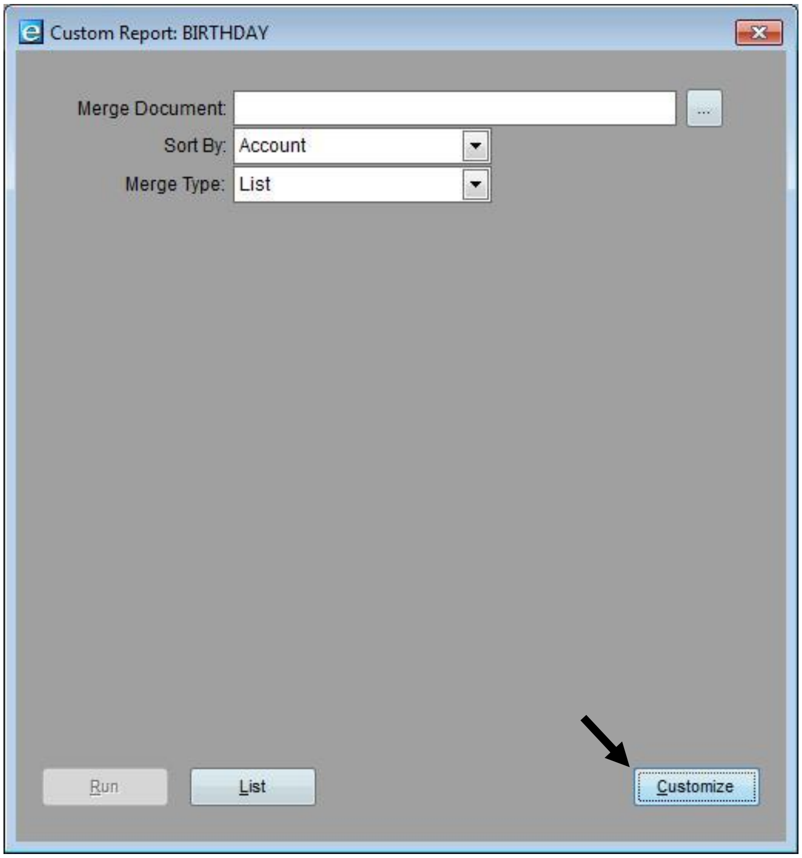


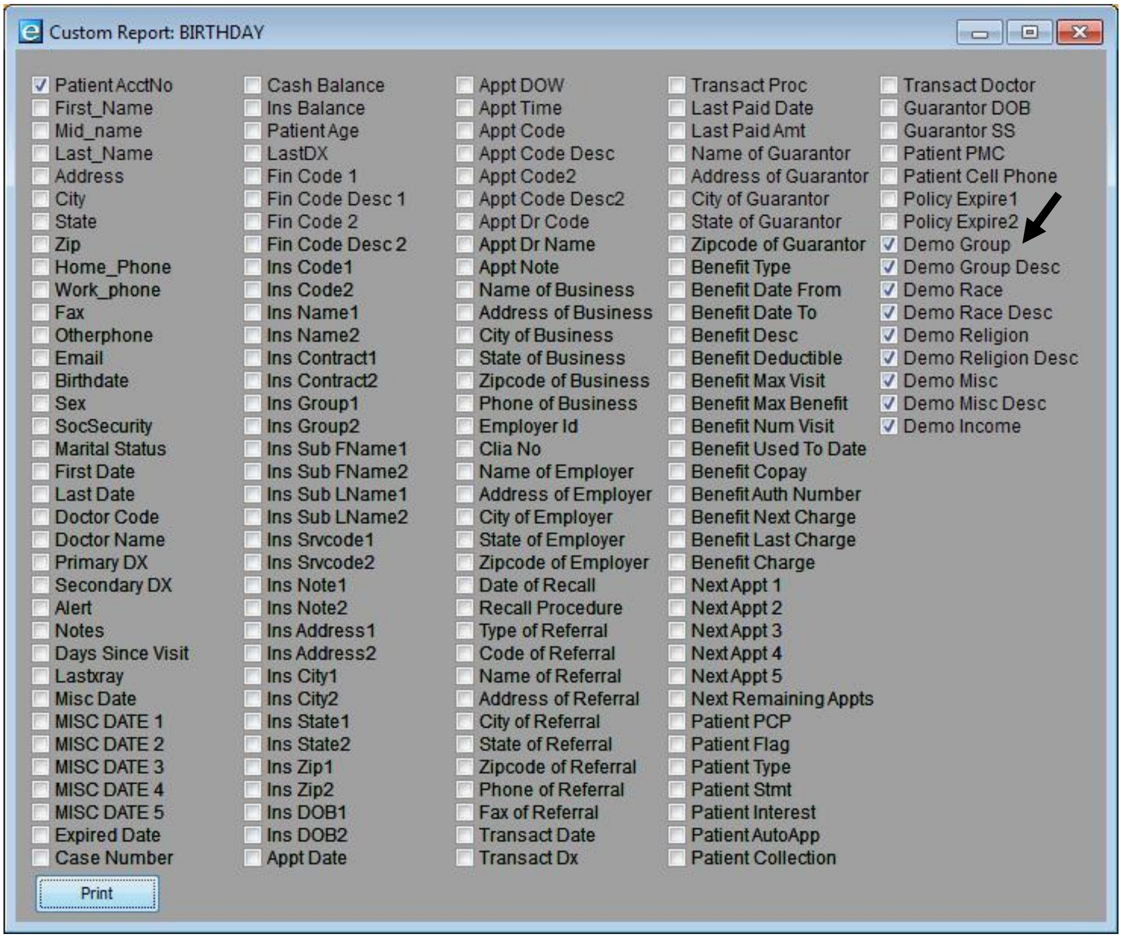


Reports

Custom Reports (Customize Button) (9.5.24)

The following fields have been added to the Customize option under Custom Reports: Demo Group, Demo Group Desc, Demo Race, Demo Race Desc, Demo Religion, Demo Religion Desc, Demo Misc, Demo Misc Desc, and Demo Income. These fields are pulled from the patient demographic information located in Patient | Utility | Demographics. This feature is found after running a custom report then choosing Customize.





Aging By Patient Report (9.5.24)

Changes have been made to include a statement indicator on all four Aging by Patient Reports. If the Patient has the Statement check-box unchecked in the Patient information screen then an indicator of *N or N will be reported on all four reports. This indicator is closely related to the collection indicator. If the Patient has the Collection check-box checked in the Patient information screen then an indicator of *C or Y is report on all four of these reports as well. The four financial reports affected are: Aging by Patient, Aging by Patient (2), Aging by Patient (Cash Only), and Aging by Patient (Fixed End).

AGING BY PATIENT Printed on 11/04/2016 Friday 10:04:09

Location System Summary Doctor MICKEY MOUSE Aging To Date 11/04/2016 Use Service Date

Name / AcctNo		Cash Balance						Insurance Balance						Balance Total
		00-30	31-60	61-90	91-120	Over120	Total	00-30	31-60	61-90	91-120	Over120	Total	
GENIUS,ALICE - 464600	*N	25.00	20.00				45.00		82.00				82.00	127.00
SOLUTIONS,MARILYNN - 910								92.00					92.00	92.00
Grand Totals:		25.00	20.00	0.00	0.00	0.00	45.00	92.00	82.00	0.00	0.00	0.00	174.00	219.00

Delinquent Claims Report (9.5.14)

The Delinquent Claims Report now has the ability to generate claims by Place of Service (POS) in addition to Procedure Code. Within the report parameters, select "Detail" to view the POS for each line of service within the claim. To view claims for a specific Procedure Code and/or POS, select the desired code.

- If you use Procedure code - any claim that has a line of service with that Procedure Code is included.
- If you use Place of Service - any claim that has a line of service with that Place of Service is included.
- If you use Procedure Code and Place of Service - any claim that has a line of service with that Procedure Code and Place of Service is included.

Name/AcctNo	DOB	Claim#	FirstBill	LastBill	Amount	Balance	Days	CN/*SSN	Type
GENIUS, ROBERT - 531930	12/16/1944	4522	05/02/2014	05/18/2014	165.00	100.00	912	03520000511	

ServiceDate	Proc	Cpt	POS	Charge	Expected	Paid	Balance
04/24/2014	11056	11056	3	100.00	100.00	0.00	100.00
04/24/2014	11721	11721	3	65.00	65.00	46.37	0.00
GENIUS, ROBERT				165.00	165.00	46.37	100.00

Print All Notes (9.5.18)

The ability to capture Other Notes and Clinical Notes on all patients during a specific time frame has been added to the left-side menu of Reports. To access this feature click the Reports tab and then select Print All Notes from the left-side menu. Enter the date range desired and then choose to include Other Notes and/or Clinical Notes. The report will list any note added in the Notes selected for the date range specified. Generate the report to the screen or to Microsoft Excel. Please reference the help file for definition to the fields printed and exported to Excel.

All Patient Notes Printed on 11/15/2016 Tuesday 09:30:16

Name: 531930 GENIUS ROBERT 248-399-0000

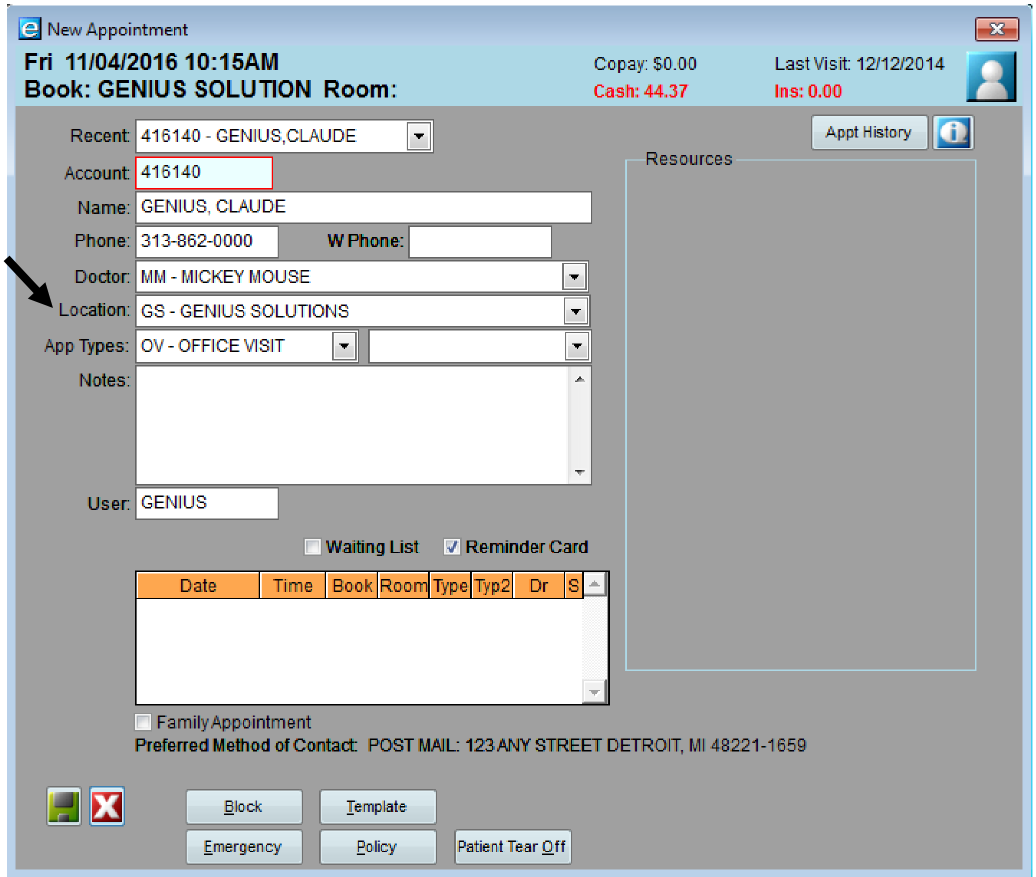
Date	Type	Subject
11/12/2016	OTHER Note: THESE ARE OTHER NOTES.	
11/15/2016	CLINICAL Note: THESE ARE CLINICAL NOTES.	CLINICAL NOTES

Users will need to assign access to this report as with all new reports in eTHOMAS. From Utility | Settings | Groups, edit the desired group, scroll to the Reports category and set the PrintAllNotes report to Full Access.

Appointments

Location on Appointments (9.5.24)

There is now a location drop-down in the appointment edit screen that will allow users to choose the location that the patient's appointment will be. This information has been designed to work in conjunction with ehrTHOMAS. When a new encounter is created in ehrTHOMAS, the provider and location will default to the provider and location information that is provided on the appointment rather than defaulting to the previous encounter information.



Tagged Appointments (9.5.18)

The Tagged Appointments List contains appointments that have been imported and scheduled into eTHOMAS, appointments that have been moved to the Rescheduled List, and appointments on the Waiting List. These three types of appointments are considered "Tagged".

Type Reschedule

Any appointment rescheduled through a time block will be placed on the Tagged Appointments with a Type of Reschedule.

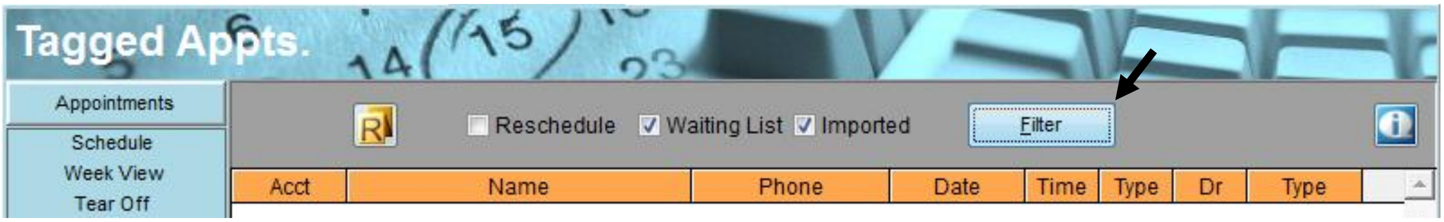
Type WaitingList

Any appointment that was placed on the Waiting List when scheduling an appointment and the Waiting List check box was checked will be placed on the Tagged Appointments with a Type of WaitingList.

Type Imported

Any appointment imported and scheduled into the Appointment Book will be placed on the Tagged Appointments List with the patients Account, Name, Phone, Date of appointment, Time of appointment, Type of appointment, Dr assigned, and a Type of Imported. Appointments are imported and scheduled through the Portal Appts.

Appointments can be filtered to only display certain statuses by selecting or deselecting the check boxes at the top of the screen and clicking the Filter button.



Portal Appointments (9.5.18)

Appointments may be imported and scheduled through a third-party software using GS Interface. Appointments imported into eTHOMAS will first be listed in the Portal Appts. Once the appointment(s) is scheduled, it will be removed from the Portal Appts list and placed on the Tagged Appts list with a Type of Imported. Any appointment with a message will not be scheduled until the error is corrected.

Messages for appointments that need attention include:

- **Acct does not match** - The patient's account number does not appear to be correct. Please edit the appointment and select the correct patient account.
- **Acct not found** - The patient's account cannot be found. Please edit the appointment and select the correct patient account.
- **Acct zero** - The patient's account cannot be found. Please edit the appointment and select the correct patient account.
- **Appt in past** - This appointment time is in the past and cannot be scheduled.
- **Book not found** - The appointment book cannot be found. Please edit the appointment and select the correct Book from the drop down menu.
- **No Appt Doctor** - The appointment doctor cannot be found. Please edit the appointment and select the correct doctor from the drop down menu.
- **No Appt Type** - The appointment type cannot be found. Please edit the appointment and select the correct type from the drop down menu.
- **Outside Book Time** - The appointment cannot be scheduled for the current time. Please edit the appointment and change the appointment time.
- **Room not Found** - The appointment room cannot be found. Please edit the appointment and select the correct room.
- **Time Slot Taken** - The appointment cannot be scheduled for the current time. Please edit the appointment and change the appointment time.

Utilities/Messaging

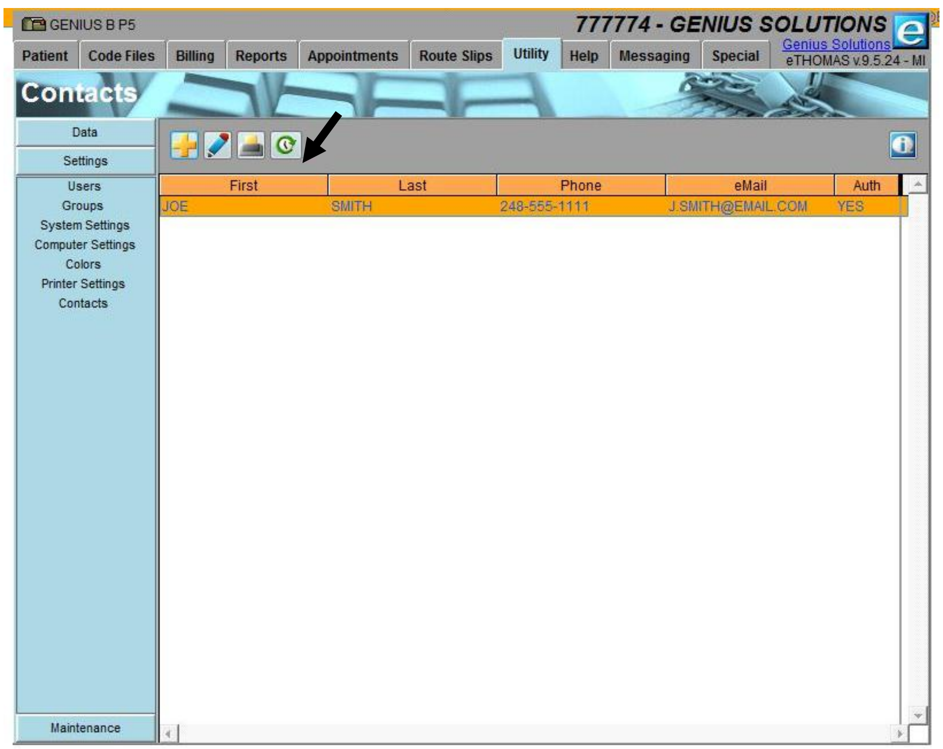
Connecting to Genius Solutions (9.5.14)

We have created a link within eTHOMAS to help make connecting with Genius Solutions easier. When our Support Department asks to connect to your computer, you will now be able to launch our connection tool from within eTHOMAS through Messaging | Connect to GS Support. Use the connection tool only when asked to connect by a Genius Solutions' representative.

Authorized Callers (9.5.18)

An area to assign and supply Authorized Callers to Genius Solutions has been added to eTHOMAS called Contacts. Contacts may be accessed through Utility | Settings | Contacts. An Authorized Caller is an individual approved by the Licensee of Genius Solutions software to represent the Licensee in the use and maintenance of the software and any data contained therein. This individual should be trained on how to use the software. Maintaining a list of Authorized Callers will assist Genius Solutions staff in identification of individuals who should be contacting Genius Solutions regarding the computer system and data as it relates to Genius Solutions software. Once all contact information is complete, click the Sync button to send the information to Genius Solutions. The Contacts feature works per account number. Offices with more than one data directory (medsys) will share contacts throughout all directories.

All Authorized Callers should be added to the Contact List. When the information is Synced with Genius Solutions, only the Contacts listed will be considered Authorized to speak to Genius Solutions.



Users will need to assign access to this area as with all new features in eTHOMAS. From Utility | Settings | Groups, edit the desired group, scroll to the Utility category and set the Contact to the desired access level.

System Settings (9.5.11)

An improvement has been made to the system settings giving users the ability to search for a new system setting by description. To Search for a description, use the drop-down and select "Description". In the Search area you can type in a word to search. This will search any description that starts with that word. If you include an "*" before the work it will search any description that contains that word.