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Enhancements

Deposit Report

There is now a report to display Pay/Adj Batches by Deposit Date. This can be useful in balancing the system to a bank statement or finding specific payments.

When the report is selected you will be prompted to enter a start and end date. The report will default to the current month.


When the search has completed the report will appear

By default, the report will be grouped by Deposit Date. The normal report functions are supported. You can remove or alter the grouping, select columns to display, their order and sorting, and you can activate filtering and limit the rows displayed. The report may also be exported to Excel or a text file.

Encounter Batch – Move Encounters to another Batch

Open Encounters can now be moved to another open Encounter Batch from the Encounter Batch form. After opening the Encounter Batch select one or more Encounters that you want to move. After selecting the Encounter(s) click the Change Batch button.
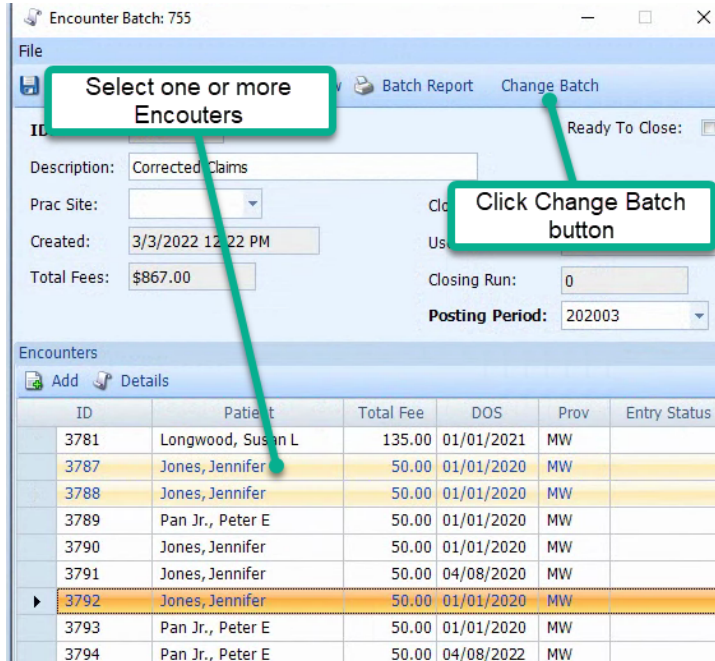
After clicking the Change Batch button you be prompted to select the batch to move then encounter(s) to. The drop down will show existing open Encounter Batches and "New" is you want to create a new batch for these Encounters.
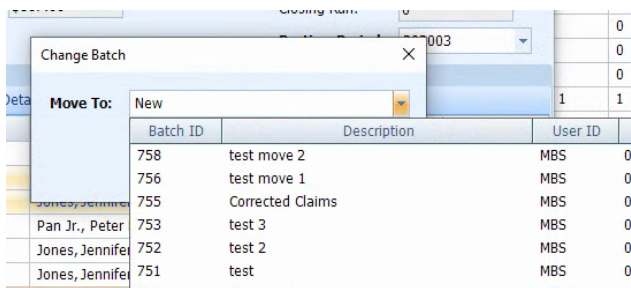
After selecting an existing batch or New click OK to continue or Cancel to cancel the move. If you selected an existing batch, clicking OK will move the Encounters and they will be removed from the Encounters listed on the batch. If you selected New, you will receive the new Encounter Batch form to create you batch. After saving the new batch clicking OK will move the Encounters to that new batch. The move is completed when you click OK on the move dialog but to update the list of Encounter Batches when you return to the Encounter Batch grid you will need to click Refresh. This will update the list of batches and the Encounter count and amount in each batch.

ERA – Improved Patient Matching

The logic used when processing ERA (X12 835) has been enhanced to help match patients to their payments when there are differences in spelling or truncation of a long name. If the ERA information matches both the WinPM Encounter ID and Patient ID that will count as a matched payment and no further checking for exact matches on first and last name will be performed.

Logon – Program version is now displayed

The version or WinPM you are running will now be shown on the logon form. This may be requested by support when working to resolve an issue with you.
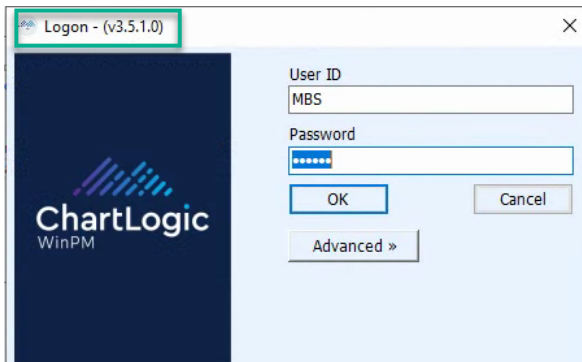
Small Balance Write-Off – View Ledger from Results Grid

Double clicking a row on the Small Balance Write-Off detail grid now has the same functionality as clicking the Ledger button. The ledger for that Guarantor will be displayed and if a service row was selected on the report that service will be selected on the ledger.
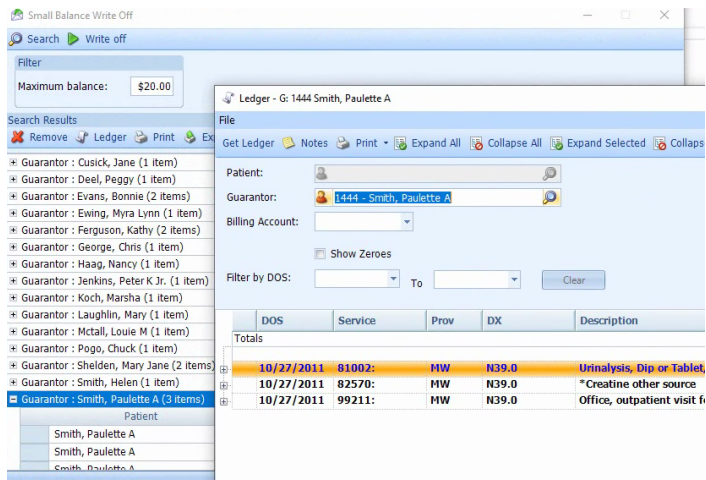
Charge Entry Status Report – View Encounter and other Improvements

There have been several enhancements to the Charge Entry Status Report. Double clicking a row in the Charge Entry Status Report will now open the referenced Encounter. A filter option has been added to the tool bar to enable filtering of results. The colors used for selected rows have been changed to make the text more legible.

EDI Receivers – URL and SSH Fingerprint Configuration

EDI Receivers now support configurable URL and SSH Fingerprints. As our EDI partners continue to enhance their security there may be a need to use these fields to configure settings different from the current defaults. Do not enter or edit any information on EDI Receivers unless instructed to by our Implementation or Support Teams. Incorrect information may prevent the system from successfully transmitting and receiving claims, ERA, eligibility and statements.

Recall Report – Mail Merge Address Fields

The patient's mailing address has been added to the merge file created in the Recall Report mail merge function.

Anesthesia Billing

WinPM now supports anesthesia billing using ASA codes and units based billing. If you require the anesthesia billing feature, contact support to discuss implementing it in your system.

Invoicing

It is now possible to create special payer accounts that will receive periodic invoices instead of claims. If you think this feature is appropriate to your practice, contact support to discuss implementing it in your system.

Bugs Fixed

- Diagnoses ICD search returns multiple rows for each code
  - A single row for each ICD code will be displayed and ICD9 Codes have been removed from the search results.
- Ledger is not sorting by descending DOS, TXs are not sorting by Entry Date
  - Services are once again sorted by descending Date of Service and Pay/Adj Transactions below each service are sorted by ascending entry date.
- Transaction Detail Report is not allowing TX Type selection
  - The + icon to expand the TX Codes has been restored and TX Codes can be selected.
- Update Billing Account Types, Collection Letter 1st Notice has balance in the middle of a text line
  - The text has been corrected to remove the balance from the middle of the sentence.
- Duplicate CAR Code selection on Claim Adjustment Report
  - Any individual CAR Code will only be added once to the selected list.