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# Release 5.4.2

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1. Enhancements

1.1 Overview

This small release is designed primary to address both concerns and issues resulting from the most recent release of version 5.4.1.

1.2 Access Permission

A new Access Permission option has been added for Accounting. From Administration/Employee, Roles/User Roles, the Access Permission settings options found in the "Accounting" folder now allow for permission to be given or denied for viewing the new "Payment Search" screen in Accounting Reports:
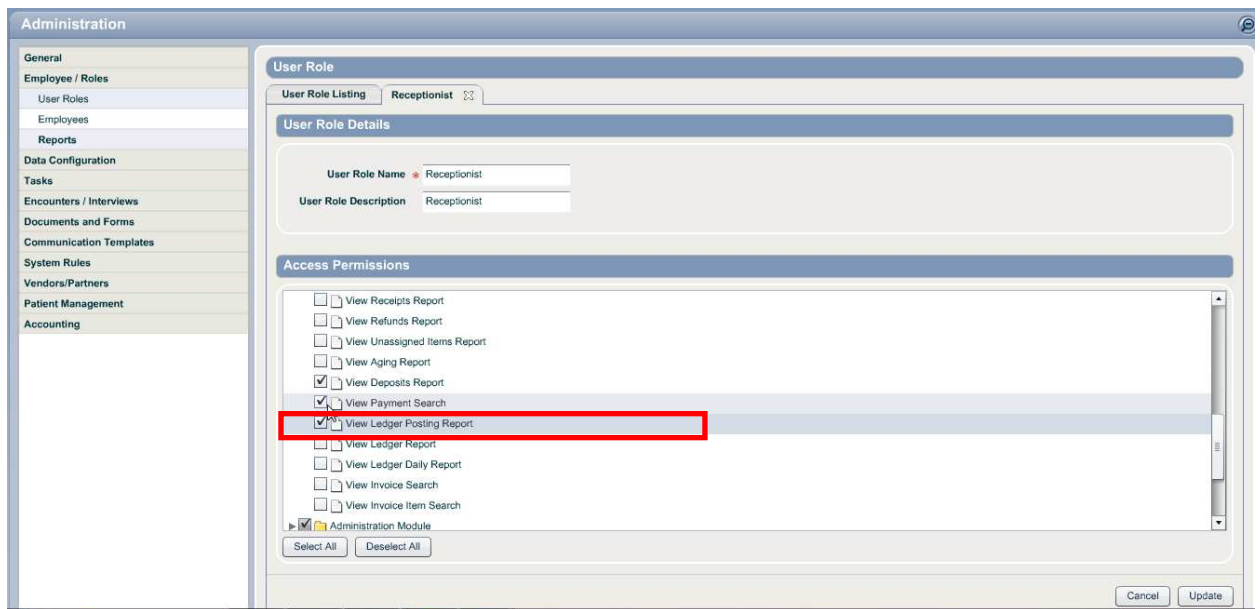
1.3 Inventory

The filters used in Inventory have been enhanced to search for characters found anywhere in the name. Prior to this release the filter would only find matches as long as the service or product name began with the characters entered in the filter field. With this release, the search will now look for services or products that contain the characters in the filter *anywhere* in the name. In the example below "UV" was typed in the filter. The results are all products that contain "UV" anywhere in the name:
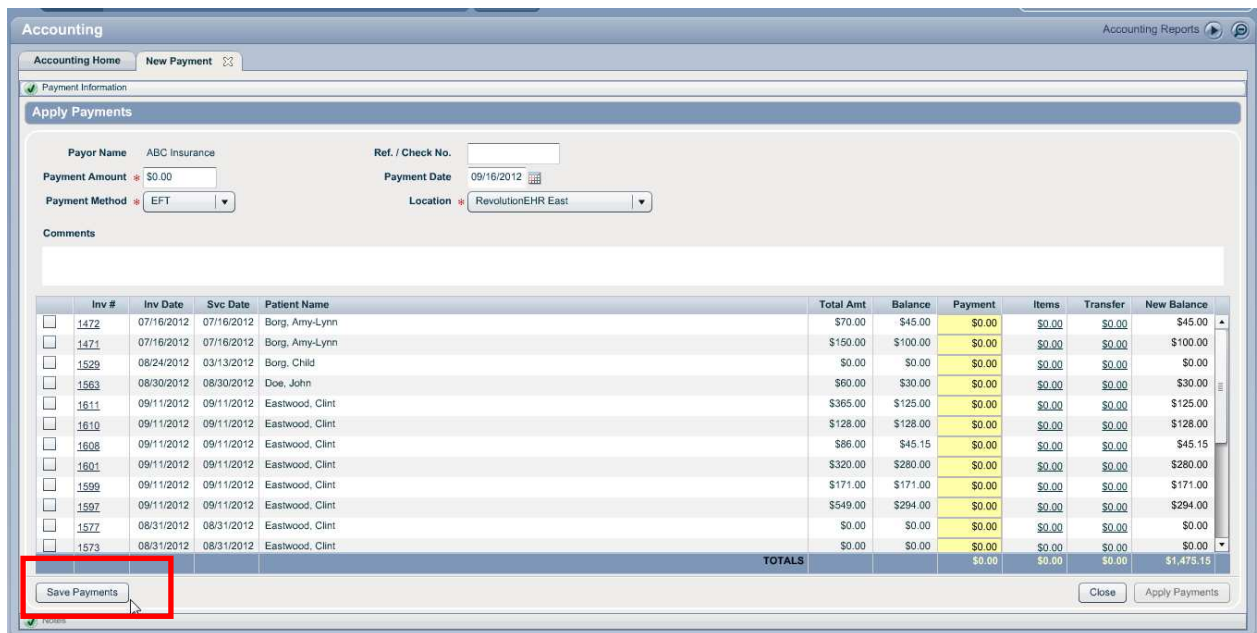
Note: Typing a single letter in the filter will still only show results starting with that letter. Filtering by the combination of letters anywhere in the name requires 2 or more letters.

1.4 Accounting

1.4.1. Save Payments

The new "Save Payments" button that was added in the last release has been moved to the far left of the Receive Payment screen:
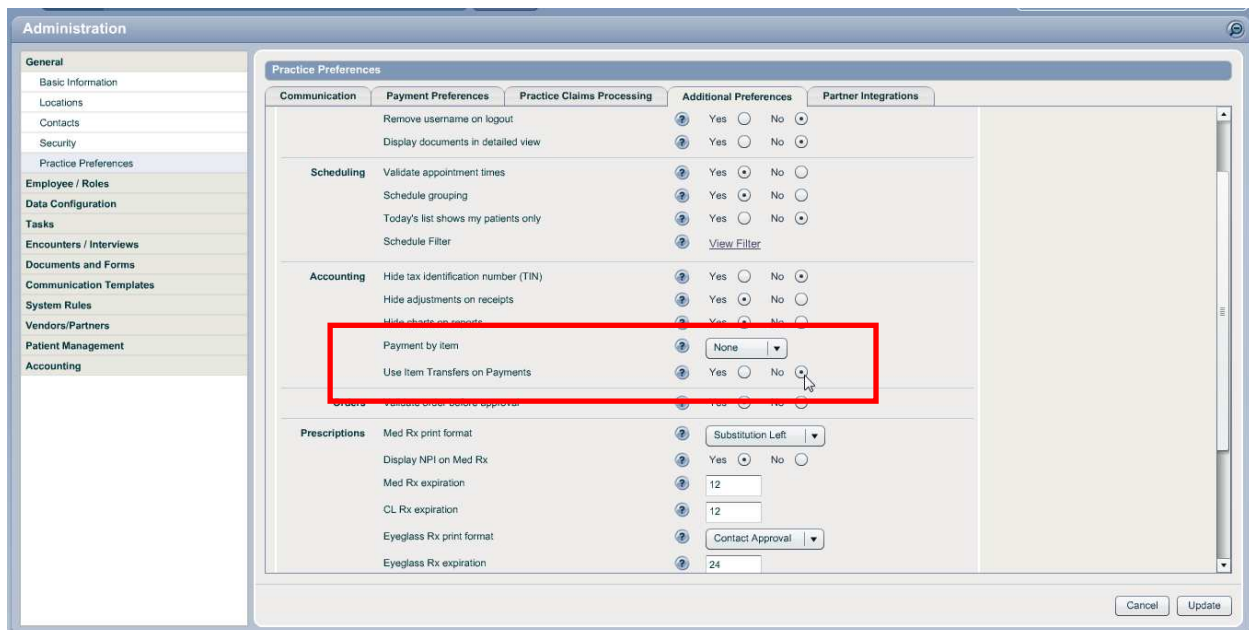
1.4.2. Disable Line Item Transfer

The new transfer screen which is opened when applying a transfer from the Receive Payment screen can now be disabled. **Important Note:** *If you choose to disable this option you will not be able to apply payments by line item, and transferring multiple times to a single payer will create multiple invoices for that payer.*

- To disable the line item transfer option within Receive Payment, go to Administration/General/Practice Preferences/Additional Prefences.

- Set Payment by Item to "None"

- Set "Use Item Transfers on Payments" to "No"

The layout of the transfer screen when item transfers is disabled is still very similar to the new tranfer screen for line item transfers.

- To transfer to another payer begin by selecting the appropriate transfer reason

- Select "Patient" or "Insurance" . If Insurance is selected, click on the appropriate insurance company name from the drop down

- Enter the Tranfer amount

- Click "Add Transfer/Write Off"

- Continue this process for all additional transfers to payers and/or write offs

- When all tranfers have been added click "Apply"

1.4.3. Include all line items in transfer

A new option has been added to both the line item transfer screen from Receive Payment and also the "Transfer Items" screen from within the invoice that will transfer *all* line items on the invoice even if there is no transfer amount indicated. Prior to this release, only items with a transfer amount would be included on the new invoice.

To transfer all items check the box for "Included all items in transfer" prior to clicking the Add Transfer/Write Off button:

Note: If you have disabled the item tranfer feature, this option will not be available when transferring from the Receive Payment screen.

1.4.4. Total amount fields

Each payment and transfer column now includes a field for "Totals" at the bottom of the column

1.4.5. New tabbing options

To aid in the efficiency of data entry for payments and transfers, new tabbing options have been added. To accommodate the new tabbing order, the placement of some fields have been changed on the main Receive Payment screen.

After clicking the "Receive Payment" button the payment screen's first field will be "Payment Amount". This field is automatically highlighted so that the first data entered can be the total payment amount. Tabbing through the next fields will go in the following order:

- Payment Amount

- Payment Method – when the payment method drop down is highlighted clicking the up and down arrow keys on your keyboard will take you up and down through the options available in this drop down. Typing the first letter of the payment method will take you to the first option in the drop down beginning with that letter. For example, typing a "C" will take you to Cash, typing "C" again will take you to Check and so on.

- If Credit Card is the selected method, the next tab stop will be Credit Card type.

- If method is something other than Credit Card or Credit Card type is selected, the next tab stop will be Ref./Check No.

- Payment Date

- Location

- Invoice payment field

- Transfer hyperlink – when the transfer hyperlink is highlighted, clicking your space bar will open the transfer screen

- When applying line item payments and transfers, the new tab stops start at the "Transfer Reason" drop down. Using the up and down arrow keys on your keyboad will take you through the Transfer Reason drop down. You may also type the first letter of the Transfer Reason to select the appropriate reason using your keyboard. If multiple Transfer Reasons start with the same letter, clicking the same letter again will take you to the next matching reason and so on.

- If there are no "Existing" patient invoices the next tab stop will highlight the "Include all items in transfer" check box. If you wish to check this box hit the space bar on your keyboard to insert a check mark

- The next tab will highlight the "Add Transfer/Write Off" button. To add the new Transfer column click the space bar on your keyboard

- After clicking the space bar to add the new Transfer column tab will highlight the first payment field for data entry:

Note: If there will be multiple transfers, it is suggested that you go back up to the top of the screen and add each transfer column as needed before entering your payment and transfer amounts to maximize your data entry efficiences.

- As you begin entering payment and transfer amounts, the tabs will take you left to right and then down to the next line and repeat

Unit Price	Sub-Total	Discounts	Tax	Ext. Price	Payment	Transfer #1	Transfer #2	Adjustments
$16.00	$16.00	$0.00	$0.00	$16.00	1 $0.00	2 $0.00	3 $0.00	$0.00
$80.00	$80.00	$0.00	$0.00	$80.00	4 $0.00	5 $0.00	6 $0.00	$0.00
				TOTALS	$0.00	$0.00	$0.00	$0.00

	All Items			Current Balance:
	Yes	⊖		Invoice Paid:
	No	⊖		Items Paid:

- After all payments and transfers have been tabbed through, the next tab will highlight the "Cancel" button

- Tabbing again will highlight the "Apply" button

- Click the space bar on your keyboard to activate the highlighted button

$0.00	$0.00	$16.00	$16.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$80.00	$20.00	$30.00	$30.00	-$60.00	$0.00
		TOTALS	$36.00	$30.00	$30.00	($60.00)	$0.00

	All Items				
	Yes	⊖		Current Balance:	$96.00
	No	⊖		Invoice Paid:	$0.00
				Items Paid:	$36.00
				Amount Transferred:	$60.00
				After Payments and Transfers:	$0.00

1 Cancel 2 Apply

1.4.6. Remove the option to "Split" items

The "Split" button found on invoices allows the ability to literally "split" the charges on a single item between two payers. This is not an ideal option in

accounting as it is most common that one payer is charged and a portion of that charge is then "transferred" to another payer. Transferring shows more information related to that item in both payer's invoices and generates better accounting reports.

However, there are 3 known states where the office is required to only bill tax to the patient on the amount of a charge that is not covered by insurance, but cannot bill tax on the amount that is covered by insurance. For those exceptions, "Split" is the only option to bill tax on only a portion of the total charge for a specific item.

Due to the issue related to write offs on split items, which is explained in the "Fixes" section below, we found several offices that were using the split button when no unusual tax requirements applied to their office. It appeared that the use of the split button was random in these offices.

For this reason we have added preference setting that would allow the practice to remove the split button from the invoice so that mistakes in selecting that button cannot occur.

If your practice has no requirements related to the billing of tax on only a portion of the total charge for an item, it is recommended that you remove the split button.

- To remove "Split" go to Accounting/General/Practice Preferences

- Click on the "Additional Preferences" tab

- Edit in the bottom right

- In the section for Accounting a new option for "Allow Split Button" has been added, to remove the split button select "No" for this option

- Update in the bottom right
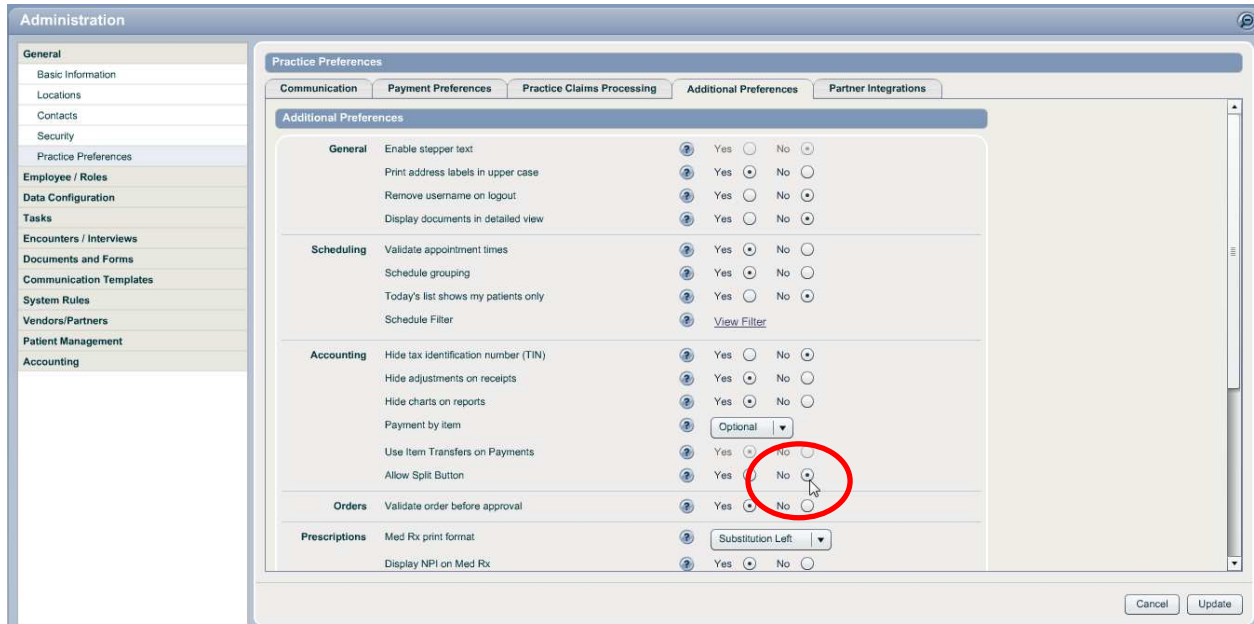
1.5 Change Practice Preference

1.5.1. Location drop down

A tool tip has been added to the options in the location drop down in the Demographics component to assist practices with long location names
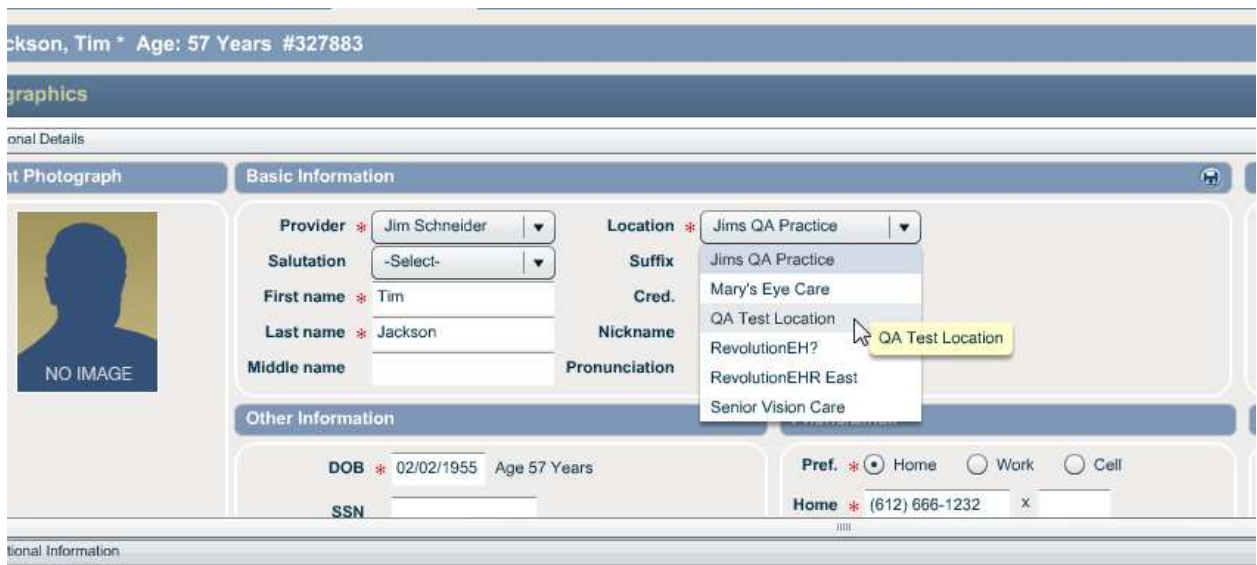
2. Fixes

2.1 Accounting

2.1.1 Applying a $0.00 payment

When apply transfers only with no payment from the Receive Payment screen a $0.00 "Pending" payment would be displayed in the Payment History slider of the invoice. This issue has been resolved and applying transfers only with no payment will no longer produce a $0.00 pending payment.

2.1.2 Write offs to "Split" items

There was an issue related to write offs being applied to items that had been "Split". The new transfer screen from the Receive Payment screen would allow the user to enter a write off amount to a Split item. However, when the action was applied it would be captured as an adjustment to the line item and would show in the Sales reports, but the invoice/item balance would not reflect the write off and the write off amount was not shown in the "Adjustments" column in the invoice. If the line item with the write off was double clicked the write off would show in the Invoice Item Detail pop up window. Instances were found in the database where users tried adding these write offs multiple times. Each attempt would add an adjustment in the Invoice Item Details pop up and show in the Sales reports but would not affect the invoice balance.

This issue has been resolved, and all write offs previously attempted will be removed. All offices affected by this issue received a separate email from Revolution regarding the changes being made.

2.1.3 Payment error message

If a users sets up a payment wher an invoice has multiple transfers going to the same payr that ar destined for a new invoice and the first transfer in the list for that payer has all $0.00 amounts for the items, an error message will occur when attempting to apply the payments. This issue has been resolved

2.1.4 Pending payments on printed receipts

Pending payments were included in the printed patient receipt. Because these are not applied payments it is not appropriate to display them as a completed payment on the patient invoice. This had been fixed and only applied payments will be included in the printed patient receipt.

2.1.5 Deposits by Method and Credit Card Type

In the last release the deposit report type option for Deposits by Method and Credit Card Type had been removed. This option has been added back.

2.1.6 Secondary claims

Following the last release, secondary claims were no longer showing the payment from the primary insurance. This has been resolved and will again display the primary payment amount on the secondary claim when a balance is transferred from primary to secondary to creat the secondary invoice.

2.1.7 Viewing "Applied" payments

In the new payment search screen it is now possible to search for and view payments that have already been applied. From this screen it appeared as though the transfer amounts were editable, but they are not. This has been resolved so that the transfers for applied payents will not apper to be editable to eliminate confusion.

2.1.8 Invoice display

In the last release a new slider for "Statement History" was added to the invoice. This occupied some extra space on the invoice and viewing the invoice from a smaller monitor or monitor with lower resolution caused the grid displaying the line items to become too small to see the scroll bar. This has been resolved with some minor changes to the invoice to gain back some of that space.

2.2 Insurance

2.2.1 Tab stops for new patient insurance coverage

When adding new coverage for a patient the tabbing has been fixed so that tab takes you through each field in the coverage screen in the order in which those fields are listed.

2.3 EHR

2.3.1 HPI Screen

When the cursor is floated over an HPI entry in the HPI screen of an encouner it will display all details related to the HPI. However, if too much data existed in the HPI, the tool tip would display scroll bars that did not scroll. This has been resolved by wrapping the text and eliminating the need for the scroll bars in this screen.

2.4 Administration

2.4.1 Exam Test Library

The Exam Test Library found in the Administration Module was allowing the user to drag the test names up and down but would create a duplicate test when this was done. This has been resolved.