| Version: 17.2 | Revision: Approved 1.0 | |
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| Practice Velocity Practice Management (PVM) ® | | |

# Client Notes

PRACTICE VELOCITY®
Urgent Care Solutions®

# RELEASE NOTES

PVM, 17.2

PRACTICE VELOCITY



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## Contents

## New Release Update Related Dependencies

This section informs all Practice Velocity® (PV) Application Users and various information technology staff members within an organization with important information regarding system and/or software dependencies required as part of a PV product release update. Such information will include, but is not limited to, the required pre-release installation and/or update of third party system software – such as Microsoft operating system upgrades, Microsoft service packs, MS.NET platform related software, browser upgrades, etc. In many instances, such upgrades and/or dependencies are critical to a successful release update and must be addressed prior to performing an update.

At the time of this PV product release update, there are no known client-side system and/or software related dependencies required by users of this PV application. However, users should be cautioned that individual personal computers, workstations and PC-based tablets that interact with PV WEB Based Application Services can and do support various versions of third party software that may hinder the proper functioning of the PV application services and in some cases may impact client-side services. Please contact Practice Velocity Customer Support (866/995.9863 or support@practicevelocity.com) or your local IT personnel if you are experiencing problems due to a PV Release Update.

NOTE: It is highly recommended that all PV Application Users and company information technology staff members with a need to know review the New Release Update Related Dependencies section of this document.

The specifications and information regarding the features in this Release Notes are subject to change without notice. All statements, information, and recommendations in this Release Notes are believed to be accurate but are presented without warranty of any kind, express, or implied. Users must take full responsibility for their application of any products.

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Any Internet Protocol (IP) addresses and phone numbers used in this document are not intended to be actual addresses and phone numbers. Any examples, command display output, network topology diagrams, and other figures included in the document are shown for illustrative purposes only. Any use of actual IP addresses or phone numbers in illustrative content is unintentional and coincidental.

## Document Purpose

This document provides the "what's new" information for the 17.2 release of PVM. The new features are listed below.

1. New Log Book Page
2. Statuses/Thresholds Page
3. Provider Information Page: Provider Setup and Payor Override
4. Log Detail | Payments Received Section: Deleting a Co-Pay Taken from Pre-Auth Results in Pre-Auth Deletion
5. Scanned Document Order
6. Practice Setting: Uses Occupational Medicine Work Queue
7. Occupational Medicine Work Queue Page Updates
8. Occupational Medicine Work Flow Page Updates
9. Occupational Medicine Work Flow Page: Select & Send Documents for Visits with both EPS and WC Services
10. Company Change Updates Reflected

## 1. New Log Book Page

A modernized *Log Book* page in PVM provides practices and clinics with a refined user interface and enhanced performance. The classic version of the *Log Book* page is enabled by default. Please contact the *Practice Velocity Software Support Team* by telephone (*866-995-9863*) or by email (*customersupport@practicevelocity.com)* to activate your clinic with the new *Log Book* page.

The new *Log Book* page has larger font sizes and an updated color scheme. Two new columns have also been added as options to the new *Log Book* page, *Arrival Status* and *Timer (*Figure 1-1). Front desk users can use these columns to monitor and prepare for patients who have completed *online check-ins*.

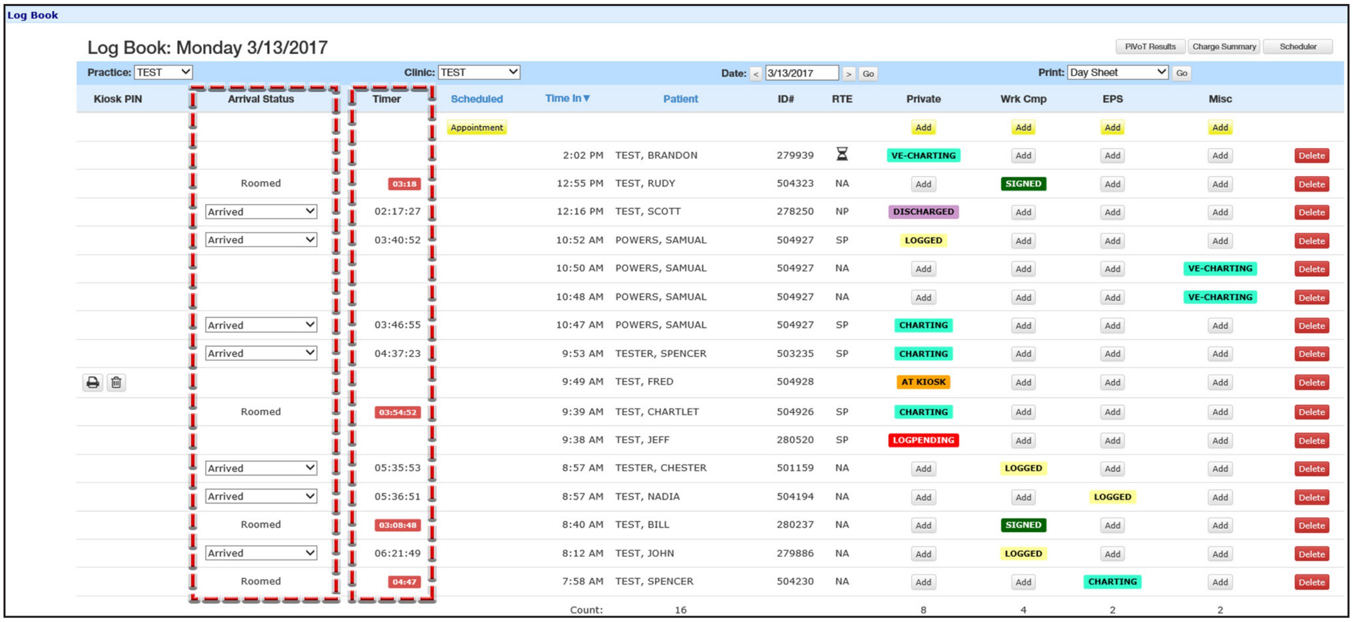


*Figure 1-1*

The *Arrival Status* column features a drop down menu of *Arrival Status* selections (Figure 1-2). A front desk user can use the arrival statuses to track a patient from the time the patient checks in online until the patient is *Roomed* in VelociDoc®

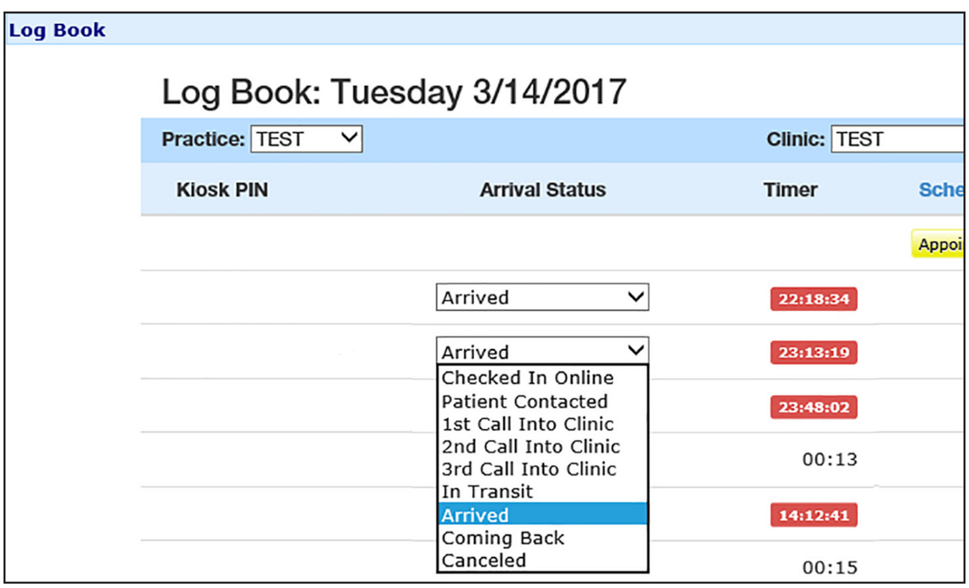


*Figure 1-2*

The *Arrival Status* drop down menu allows the user to select from the following statuses:

- **Checked In Online:** This is the default *Arrival Status* for patients using an integrated *online check-in* product such as *ZipPASS* or *eCheckIn*. When an online check-in occurs, the patient displays on the new *Log Book* page with this status set by default.
- **Patient Contacted:** This status can be used to indicate that a patient was contacted to confirm an *online check-in*.
- **1st Call Into Clinic (2nd, 3rd):** These *Arrival Statuses* can be used if a practice calls a patient to confirm the appointment time. When the first call needs to be completed, select ***1st call Into Clinic*** and the timer counts up until the user indicates the call was completed by updating the *Arrival Status*.
- **In Transit:** This status can be used if a practice notifies the patient that it is time to come into the clinic. Users can select this *Arrival Status* to track how much time has elapsed since confirming the patient is in transit.
- **Arrived:** The user can update the status to *Arrived* when a patient has checked-in online and arrives in the clinic. Additionally, the *Arrival Status* is set to *Arrived* automatically for all patients who have completed registration.
- **Coming Back:** This status can be selected if the patient needs to exit the clinic temporarily or would like to wait outside. The user can update the status back to *Arrived* when the patient returns.
- **Canceled:** This status can be used if a patient checked-in online and did not arrive at the clinic. The *Canceled* status can also be used for any patient who leaves the clinic after registration without being seen. The timer for the visit stops and the new *Log Book* page indicates that the online check-in is ***canceled.***
- **Roomed:** When a patient is roomed in VelociDoc, the system updates the *Arrival Status* to *Roomed*. The timer stops and the *Arrival Status* cannot be updated from the new *Log Book* page.

The *Timer* column provides the front desk staff visual management. This column can be configured with thresholds and highlights *yellow* or *red* when a patient has been in an *Arrival Status* for an extended period of time (Figure 1-3).

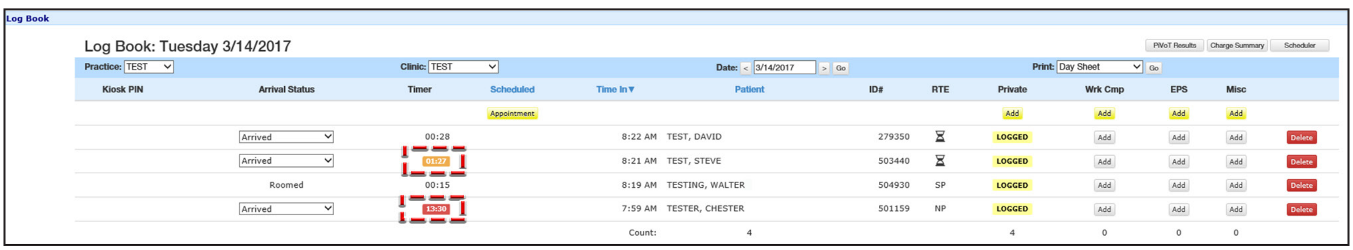


*Figure 1-3*

## 2. Statuses/Thresholds Page

Administrative users have access to a new *Status/Thresholds* page on the *Resource* drop down menu. The *Resources > Statuses/Thresholds* page has two sections (Figure 2-1). The left section, *Statuses with Thresholds (PVM and VLD),* is used to configure the *Arrival Status* column and *Timer* column on both the new *Log Book* page in PVM and modern *Tracking Board* page in VelociDoc. The right section, *VelociDoc Timer Thresholds,* supports configuration of new timer functionality for *List Groups* on the VelociDoc modern *Tracking Board* page.

These sections can be used independently. The user does not have to configure the *Statuses with Thresholds (PVM and VLD)* to use *VelociDoc Timer Thresholds* and vice versa.

**Important note:** The user must log out and log back in PVM and VelociDoc for any edits or changes to the *Statuses/Thresholds* page to take effect. The VelociDoc functionality will be discussed in the VelociDoc Release Notes.

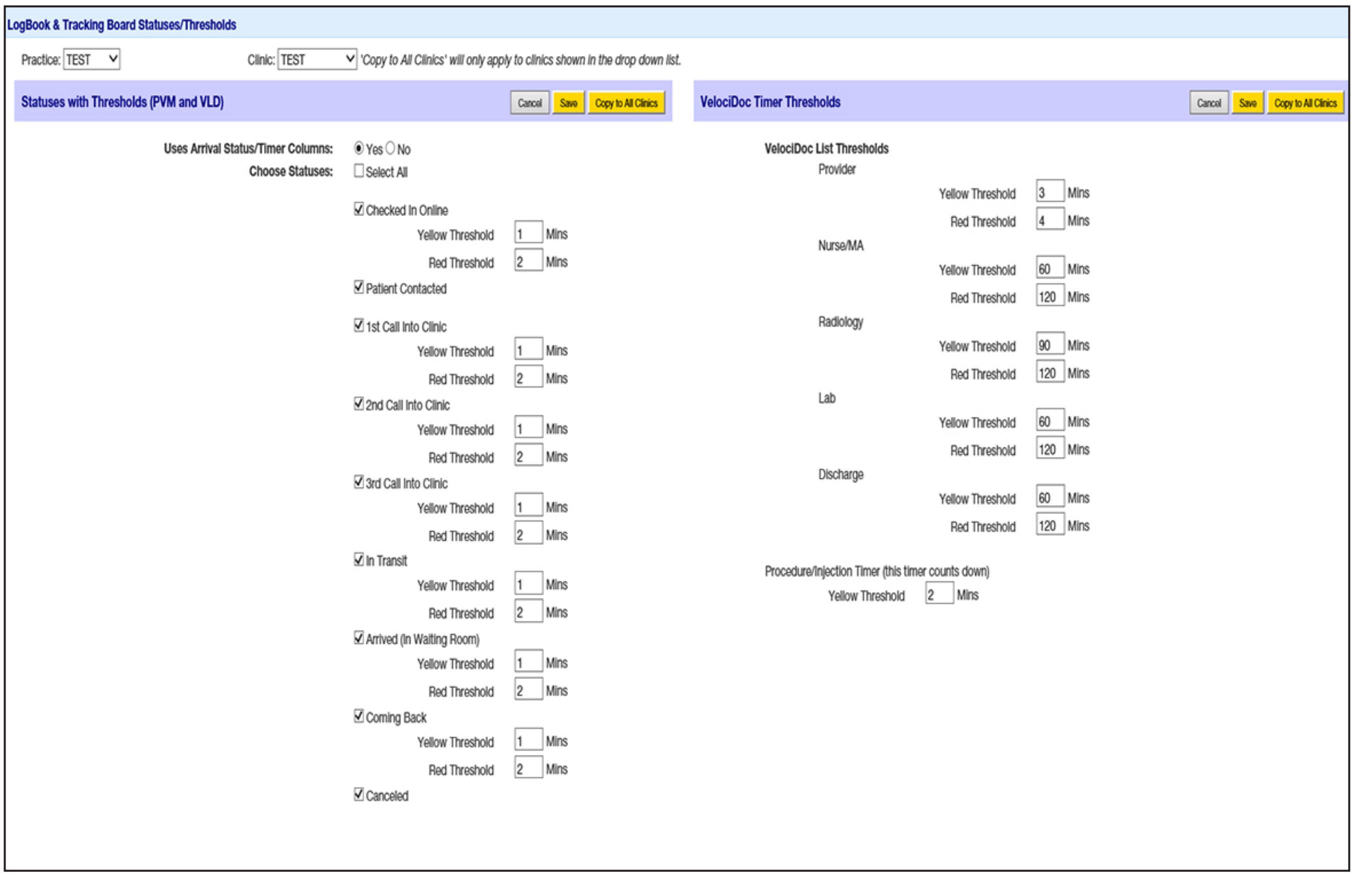


*Figure 2-1*

### Statuses/Thresholds Page: Patient Arrival Status Threshold Configuration

The *Statuses and Thresholds (PVM and VLD)* section of the *Statuses/Thresholds* page is used to turn on and off the *Arrival Status* and *Timer* columns on the new *Log Book* page. An administrative user selects ***Yes*** to display the columns and ***No*** to remove the columns from the new *Log Book* page. The default setting is ***No*** (Figure 2-2).

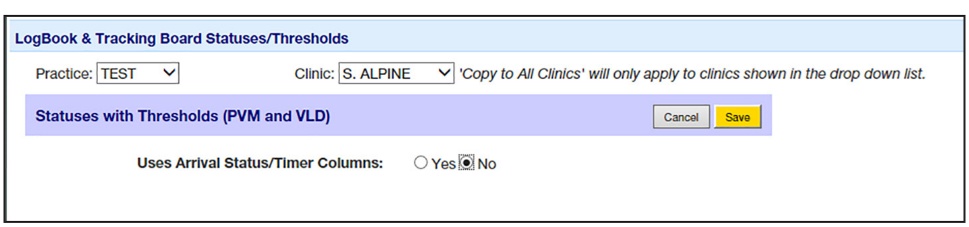


*Figure 2-2*

When the *Uses Arrival Status/Timer Columns* setting is set to ***Yes***, the *Choose Statuses* options display. Statuses that are selected display within the drop down menu in the *Arrival Status* column on the new *Log Book* page in PVM and within VelociDoc modern *Tracking Board* page. An administrative user can activate all statuses by clicking the ***Select All*** check box or select only the ***statuses*** of use to the clinic (see Figure 2-3*)*.

Most of the *Arrival Statuses* can be configured with *Thresholds*. Two threshold options are available, *Yellow Threshold* and *Red Threshold*. Thresholds indicate to front desk users that a patient has been in an arrival status for a specified period of time. When the threshold is met, the *Timer* column in PVM and VelociDoc highlights ***yellow*** or ***red.*** The *Yellow Threshold* is a warning to indicate to users that a patient is about to exceed the maximum amount of time that is setup for that *Arrival Status*. The *Red Threshold* indicates that the maximum amount of time setup for that *Arrival Status* has been met or exceeded.

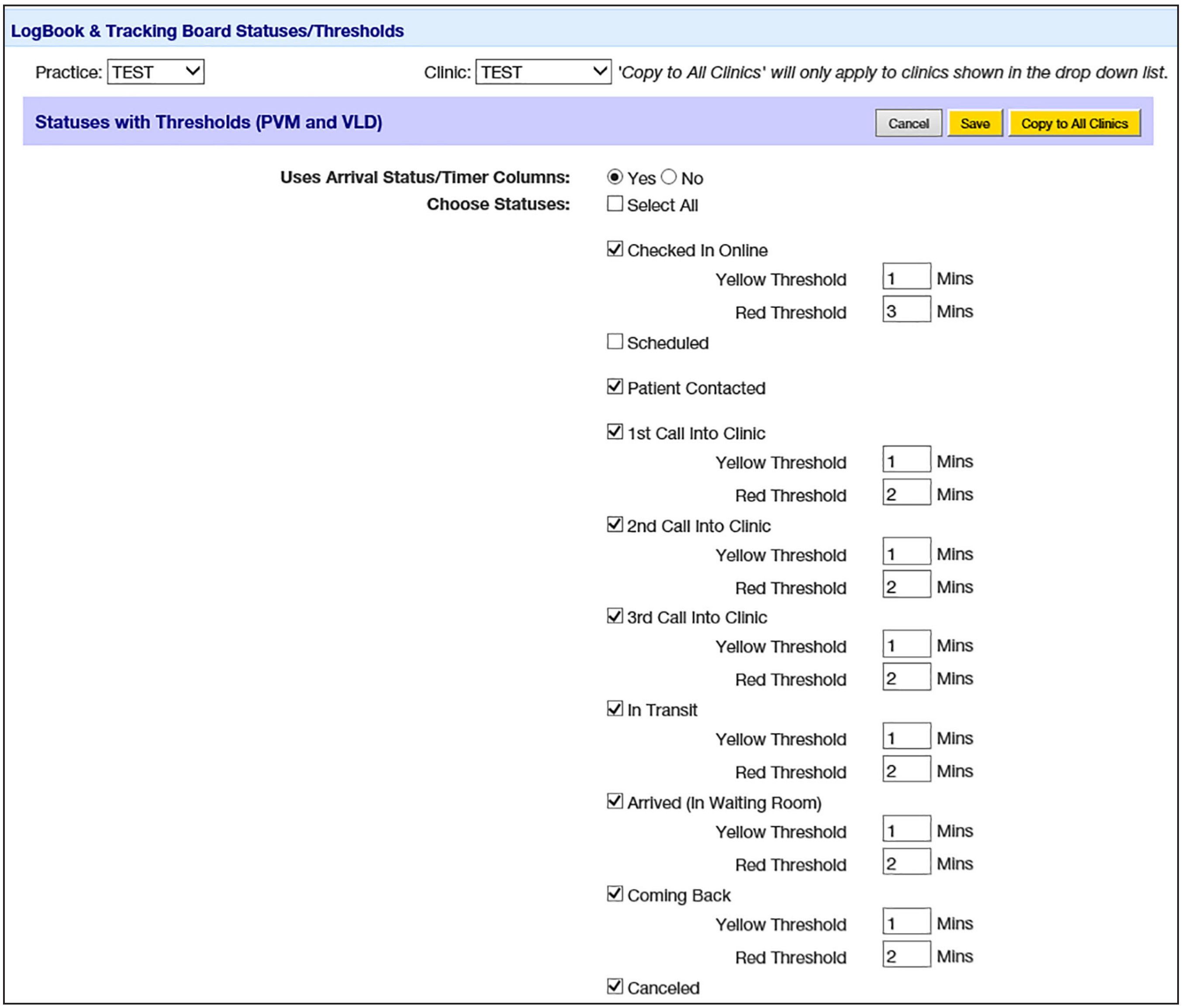


*Figure 2-3*

**Important Note:** A threshold is set in whole minutes up to 9999 minutes. The *Red Threshold* value must be greater than the *Yellow Threshold* value in order for the threshold values to be saved. The *Threshold* fields are not required and the *Arrival Statuses* can be used in PVM and VelociDoc even if Thresholds are not used. Furthermore, if the *Uses Arrival Status/Timer Columns* is set to ***No***, the *Choose Statuses* options will not display on the page.

### Statuses/Thresholds Page: VelociDoc List Threshold Configuration

VelociDoc offers a new *List Groups* setting that automatically assigns a chart to a group to maximize awareness of charts pending completion. For more details about the functionality of *List Groups*, see the VelociDoc Release Notes. To enable the *Roomed Patient List* setting, please contact the *Practice Velocity Software Support Team* by telephone (*866-995-9863*) or by email (*customersupport@practicevelocity.com).*

Once a practice/clinic enables modern *Tracking Board* and *Roomed Patient Lists*, an administrative user can navigate in PVM to the *Resources* > *Statuses/Thresholds* > *VelociDoc Timer Thresholds* section to setup *Yellow* and *Red* Thresholds for VelociDoc *List Groups*.

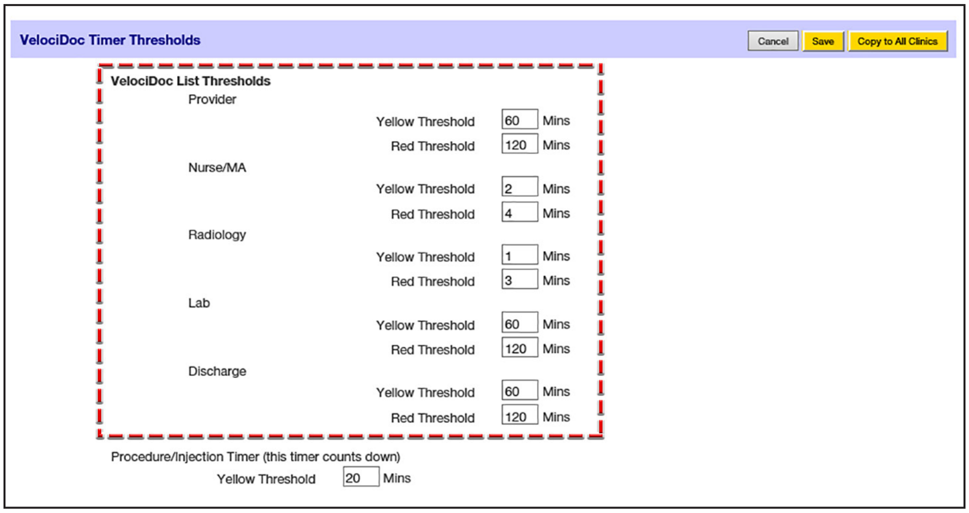


*Figure 2-4*

Each *List Group* can be configured with *Thresholds*. Two threshold options are available, *Yellow Threshold* and *Red Threshold* (Figure 2-4). When the threshold is met, the *List Timer* column, located in the VelociDoc > modern *Tracking Board* > *Roomed Patients* panel, highlights ***yellow*** or ***red.*** The *Yellow Threshold* is a warning to indicate to users that a patient is about to exceed the maximum amount of time setup for that *List Group*. The *Red Threshold* indicates that the maximum amount of time setup for that *List Group* has been met or exceeded.

**Important Note:** A threshold is set in whole minutes up to 9999 minutes. The *Red Threshold* value must be greater than the *Yellow Threshold* value for the threshold values to save. The *Threshold* fields are not required to use *List Groups* in VelociDoc.

### Statuses/Thresholds Page: Procedure/Injection Timer Threshold Configuration

The modern *Tracking Board* in VelociDoc also features a new *Timer* column. Administrative users can configure the VelociDoc *Timer* column with a *Yellow Threshold* to manage *procedures* and/or *injections*. The *Procedure / Injection Timer Yellow Threshold* counts ***down*** (unlike other threshold timers). When the VelociDoc > modern *Tracking Board* > *Timer* is set, the column highlights ***yellow*** to alert users that the timer is about to expire. When the timer reaches zero (0), the column highlights ***red***.

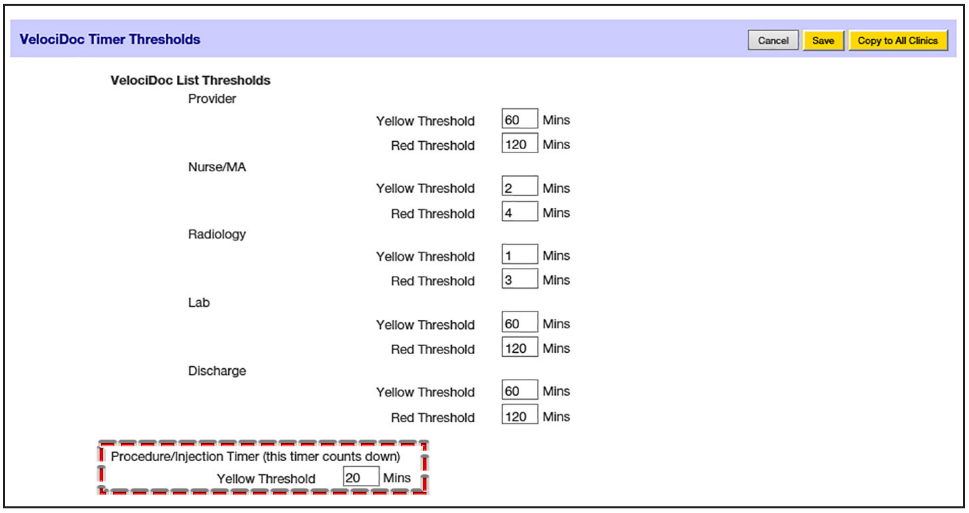


*Figure 2-5*

A practice and/or clinic must have the modern *Tracking Board* and *Roomed Patient Lists* settings enabled to setup the *Procedure/Injection Timer Threshold*. An administrative user navigates in PVM to the *Procedure/Injection Timer Yellow Threshold* field on the *Statuses/Thresholds* > *VelociDoc Timer Thresholds* page (see Figure 2-5). By default, the *Yellow Threshold* is set at one minute. However, when lists are enabled, the user is allowed to change the *Yellow Threshold* from the default, as needed. A threshold is set in whole minutes up to 9999 minutes.

**Important Note**: The functionality of the VelociDoc *Timer* will be discussed in detail in the VelociDoc Release Notes.

## 3. Provider Information Page: Provider Setup and Payor Override

The *Provider Information* > *Bill To* drop down menu is **not** intended for payor override. Using the *Bill To* drop down menu in error can result in compliance issues with payors if the incorrect rendering provider is reported. The *Provider Information* > *Bill To* drop down selection, if empty, is ***disabled*** to ensure clinics maintain compliance with payors. When the *Bill To* field is disabled, text below the field states: *For compliance reasons this field has been deactivated. For more information click* ***<u>Here</u>*** *(hyperlink) (*Figure 3-1*).*

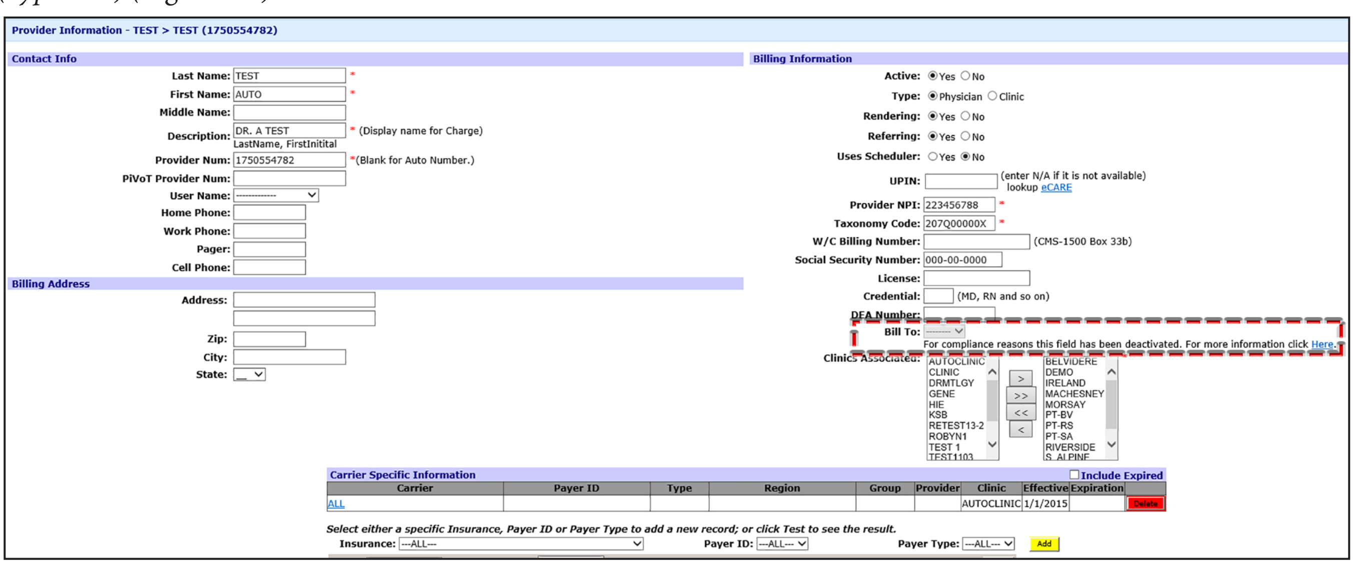


*Figure 3-1*

If the *Provider Information > Bill To* drop down selection has a provider selected, then the text below the field states: *For compliance reasons and to avoid ongoing errors we suggest deleting the provider name from this field. For information on a better way to override the bill-to provider click **Here**.* The ***Here*** hyperlink displays instructions for using *Payor Override* in the *Carrier Specific Information* section of the *Provider Information* page (see Figure 3-2).

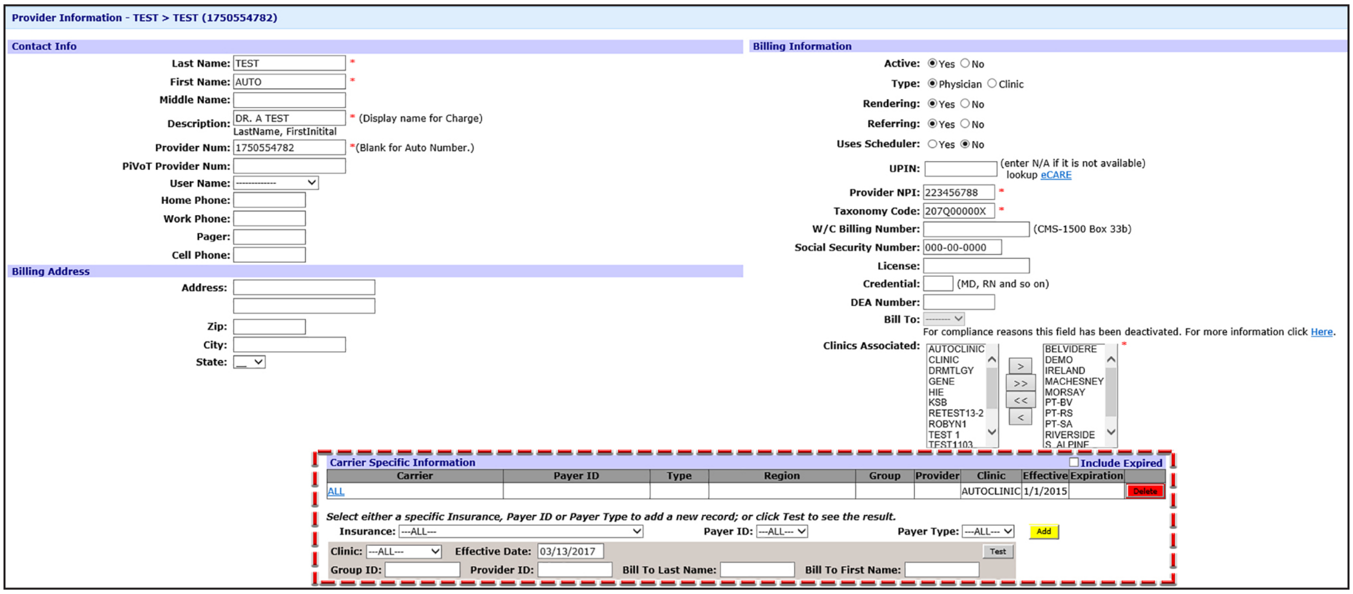


*Figure 3-2*

The *Carrier Specific Information* section on the *Provider Information* page has also been updated to exclude and/or include ***expired*** carrier specific information (Figure 3-2). Users can see all carrier specific payors by clicking the ***Include Expired*** check box. Only active carrier specific payors display if the user deselects the ***Include Expired*** check box. The effective and expiration dates are maintained when a payor is setup. Instructions are included in the ***Here*** (*hyperlink*) document.

## 4. Log Detail | Payments Received Section: Deleting a Co-Pay Taken from Pre-Auth Results in Pre-Auth Deletion

A front desk user can collect a ***co-pay*** with a *pre-auth* by credit card. If a user deletes a *co-pay* that was processed with a *pre-auth***,** the *Log Detail > Payments Received* section now displays the notification *PreAuth Is Canceled* (see Figure 4-1). This warning reminds the user to process the ***Pre-Auth*** transaction again.

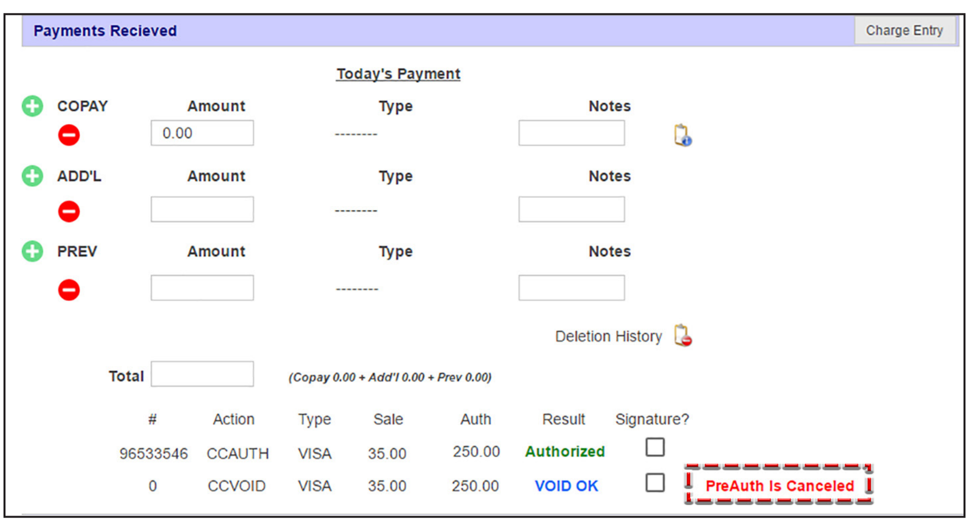


*Figure 4-1*

## 5. Scanned Document Order

Patients that frequently visit a clinic may have a long list of scanned documents. To help users easily locate a specific document, the Docs drop down on the *Patient Accounts Receivable* page has been updated to display documents in date order, listing the newest date on top (Figure 5-1).

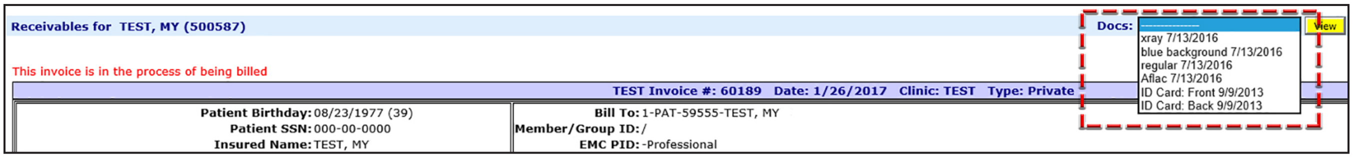


*Figure 5-1*

## 6. Practice Setting: Uses Occupational Medicine Work Queue

In preparation for the upcoming release of the *WC Portal*, the existing *EPS work queue* has been enhanced to support *Work Comp visits without EPS services* with the same efficiency as *Work Comp visits with EPS services*. Please contact the *Practice Velocity Software Support Team* by telephone (*866-995-9863*) or by email (*customersupport@practicevelocity.com)* to enable *Occupational Medicine Work Queue*.

## 7. Occupational Medicine Work Queue Page Updates

The *Occupational Medicine Work Queue Filter* is now enhanced to support the addition of *Work Comp visits without EPS services*. The *Admin1 > EPS Work Queue* menu selection has been renamed to *Occ Med Work Queue* and the *EPS Work Queue* page has been renamed to *Occupational Medicine Work Queue* (Figure 7-1).

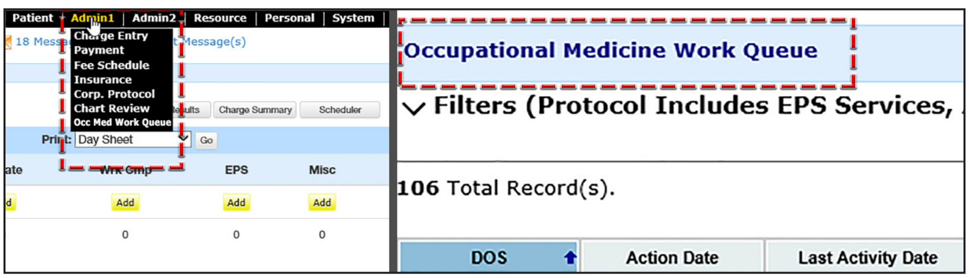


*Figure 7-1*

### Occupational Medicine Work Queue Filter Updates

The *Occupational Medicine Work Queue Filter* is renamed ***Filters (Protocol Includes EPS Services, Active Pending)*** (formerly *Filtered Search*). The menu is relocated from a link in the upper right of the page (see Figure 7-2) to an expandable menu on the left side below the *Occupational Medicine Work Queue* page header (Figure 7-3).

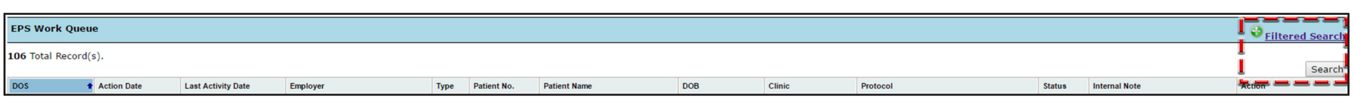


*Figure 7-2*

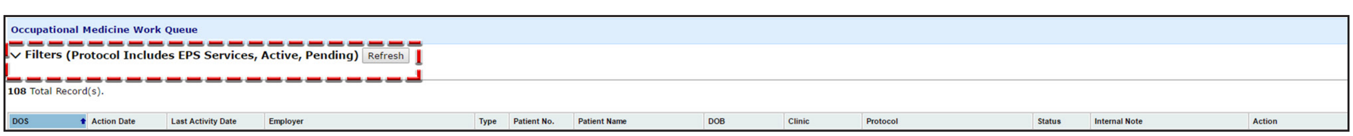


*Figure 7-3*

A *Visit* filter is available to allow users can distinguish *Work Comp visits with EPS services* from *Work Comp visits without EPS services* in the *Occupational Medicine Work Queue*. By default, filter criteria *Visit: Protocol Includes EPS Services* and *Status: Active, Pending* are selected and applied to the work queue. Other filters have been maintained but regrouped with headers to make filters easier to identify (see Figure 7-4).

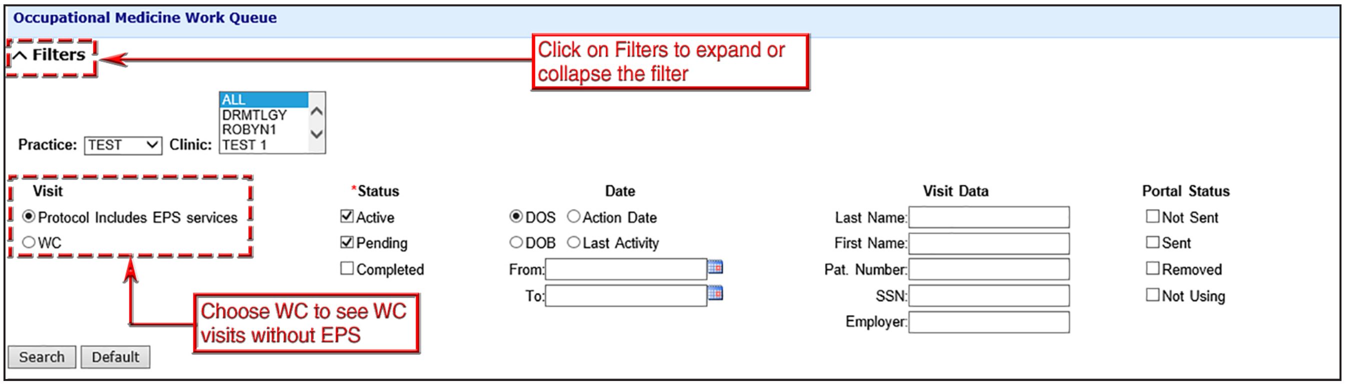


*Figure 7-4*

## 8. Occupational Medicine Work Flow Page Updates

The *Occupational Medicine Work Flow* page has been enhanced to support the addition of *Work Comp* visits to the queue and has been renamed to *Occupational Medicine Work Flow.*(Figure 8-1).

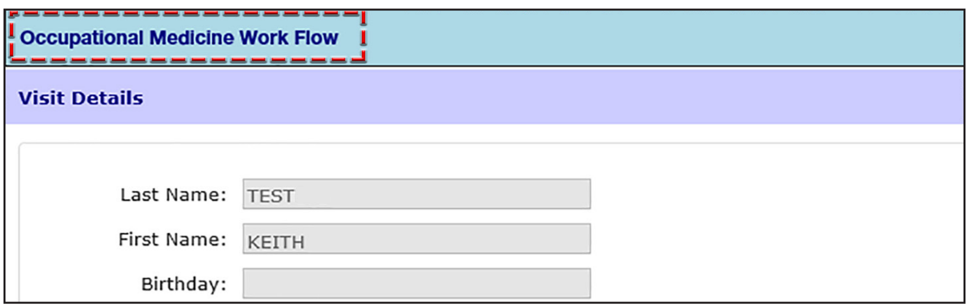


*Figure 8-1*

### Occupational Medicine Work Flow Page: Visit Details Section

The *Occupational Medicine Work Flow* > *Visits Details* section now displays *Uses EPS Portal: [YES / NO]* and *Uses WC Portal: [YES / NO]* to help users easily identify the *Employer Portal* settings of employers. It also allows users to verify the type of visit documentation to send to the *Employer Portal (*Figure 8-2*)*.

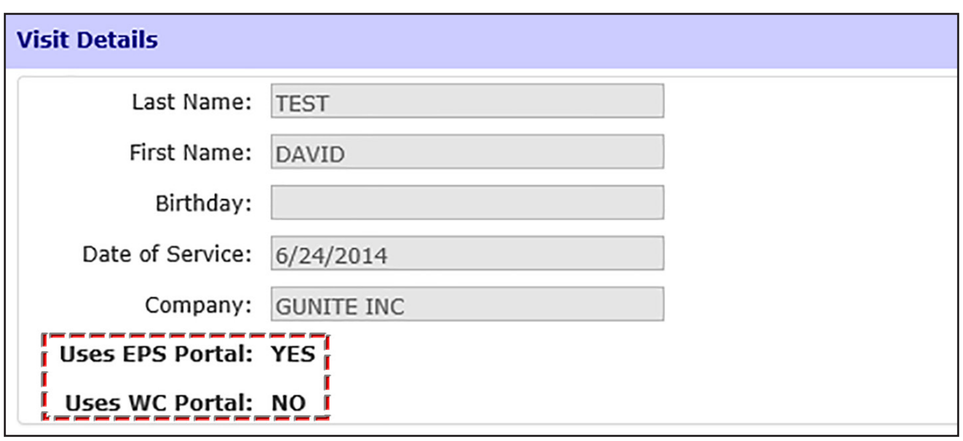


*Figure 8-2*

## 9. Occupational Medicine Work Flow Page: Select & Send Documents For Visits with both EPS and WC Services

The *Occupational Medicine Work Flow > Select & Send Documents (Adds to current documentation in the Portal)* section displays documents scanned into VelociDoc for *Work Comp visits with EPS Services.* The *Select & Send Documents* section now allows a user to identify the document type prior to electronically submitting document(s) to *Employer Portal.*

A document can be added to the *EPS Document* section, the *WC Document* section, or both (Figure 9-1)**.** After selecting a document from the *Select Document* section, the user clicks either the ***EPS Document*** or the ***WC Document*** button. The document adds to the corresponding *Selected EPS Documents* or *Selected WC Documents* section. A document can be added to both sections by selecting the document again from the *Select Document* section and clicking either the ***EPS Document*** button or the ***WC Document*** button.

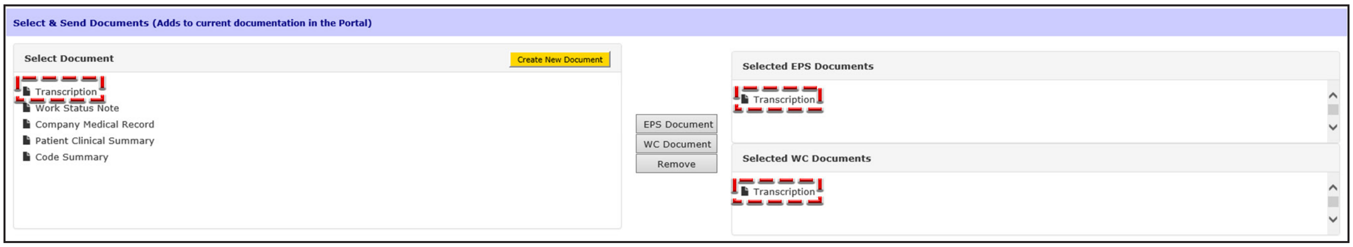


*Figure 9-1*

If a *new document* is created in the *Occ Med Work Flow: Document Editor* for a *Work Comp visit with EPS services*, the document automatically displays in both the *Selected EPS Documents* and *Selected WC Documents* sections by default. The user can remove the new document from a section by selecting the document and clicking the ***Remove*** button. (Figure 9-2).

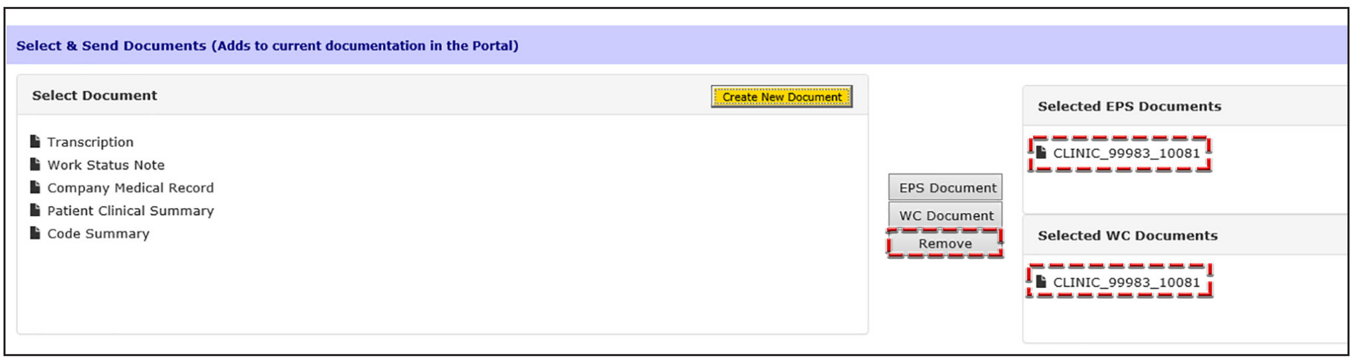


*Figure 9-2*

**Important Note**: *Work Comp visits without EPS Services* only displays *WC documents* and *EPS only* visits only displays *EPS Documents* in the *Selected Documents* section.

The *Occupational Medicine Work Flow > Action Log* section and *Processed Documents* section displays *EPS documents* and *WC documents* separately. Each document has a hyperlink so that documents can be reviewed individually (see Figure 9-3).

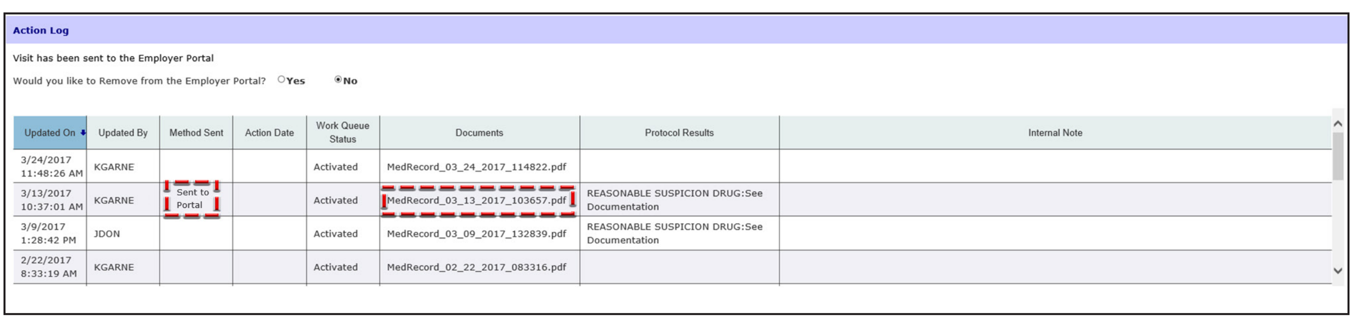


*Figure 9-3*

## 10. Company Change Updates Reflected

When a user updates an employer or an employer protocol on the *Log Detail* page (Figure 10-1), an *Internal Note* is automatically created on the action log on the *Occupational Medicine Work Flow* page.

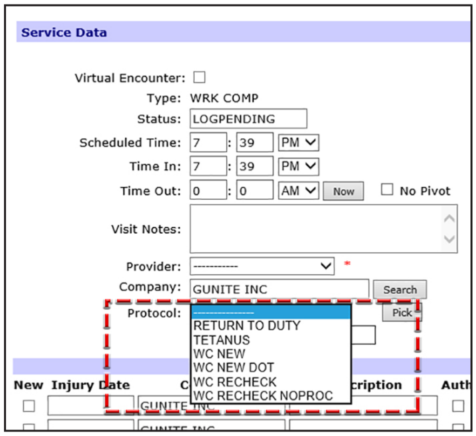


*Figure 10-1*

When an employer is updated, the *Internal Note* on the *Occupational Medicine Work Flow* page states: *Company name was changed from Company (old name) to Company (new name)* (Figure 10-2).

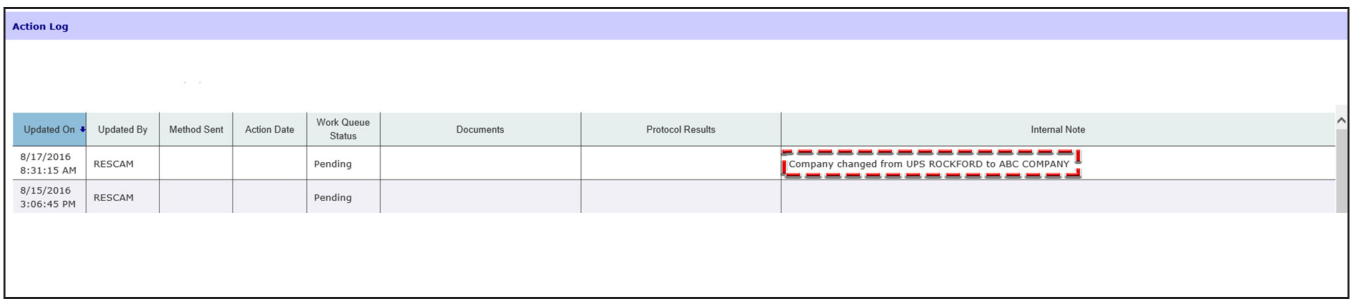


*Figure 10-2*