



v2.5.17

Section	Feature	Details
Billing - Patient	Accident Filing	Under patient financial payer may now indicate accident claim filing
Calendar - Audit	Audit Trail - PCG	Assignment history detail now shows audit of when PCG signature captured
Calendar - Auth	Auth Details	Any authorization where status is not equal to authorized is highlighted in red (i.e. waiting on eval/ pending approval)
Clinical	Orders – Type	Ops – Clinical – Orders pages (New & Pending MD Signature) now have order type filter
CRM	Marketers	Marketer field added to CRM; any employee with discipline EMPL will be in drop down
Employee	Employee	Clinician labels replaced system-wide with ‘Employee’
Employee	Disciplines	Employee may be assigned multiple disciplines (i.e. HHA & CNA)
Employee	License	New discipline type added: EMPL to allow for management of non-clinical staff
Employee	Disciplines	Discipline field now includes state & effective date (optional)
Patient	Skill	Skill type employee added to system to allow for management of non-clinical staff
Patient	Referral Source	Patient Referral Source now visible/editable on patient details page



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Patient	Notes – Incident	Note Type: Incident updated to include specific details: date, time, type, physician & physician notification
Payroll	Payroll Rounding	Payroll will now round to follow unit rules of service codes when exact time used for clock in/clock out
Payroll	Pay Rates	Pay Rates include Productivity Points (optional) *reportable under reports – employee - productivity
Reports - Billing	CRM	CRM report showing all referral source activity
Reports - Billing	CRM	Phone extension added to referral source contacts
Reports - Billing	Insurance Type	Insurance Type added to finance reports incl. MEC Details & MEC A/R
Reports - Employee	Productivity	Productivity Report calculates employee productivity based on assigned pay rate points
Reports - Patient	Quick Intake	Patient Detail Report new option: Quick Intake report detailing patient referrals and payers
Users	Add New	When adding a new user prompted which type & redirected appropriately to avoid duplicates