



Enhancement Guide

Version 9.1.0

APPLICATION MANUAL

vertexdr.com

a MERIDIAN MEDICAL MANAGEMENT company

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Collection Letters

Definitions/Documents

Definition->Parameters->Documents

Definition->Security->Users

There is a new option on the Documents Parameters Page called Collection Letters.

VertexDr Document Parameters

Document Parameters
Define default document parameters for the system.

Document Types

Insurance Cards:	INSURANCE CARD
Scanned Images:	AIRFLOW CHART
Patient Images:	DRIVERS LICENSE
Incoming Faxes:	CONFIDENTIAL FAX
Reassigned Docs:	WRONG PATIENT DOCUMENTS
Lab Orders:	MISC. LETTERS
COF Agreement:	DOCUMENT NOT REQUIRING SIGN-OFF
Medcin Note:	MEDCIN NOTE
Mail Merge:	MAIL MERGE DOCS
Collection Letter:	COLLECTION LETTERS

Scanned Documents

Color Resolution: 200 Gray Resolution: 200 B&W Resolution: 200

Scanner Location: Auto Document Feeder (Du) Scan in background

Patient Images

Image Resolution: 640 x 480 Image Quality: 100

Patient Chart

Default Sort: Received Date

Routing

Default Filter: All Users Custom Filter: Document Sweep

Default Values: Last Routed Values

Signature Overlay

X Position: Default inches

Y Position: Default inches

Signed By Text: Electronically Signed by

Custom Forms

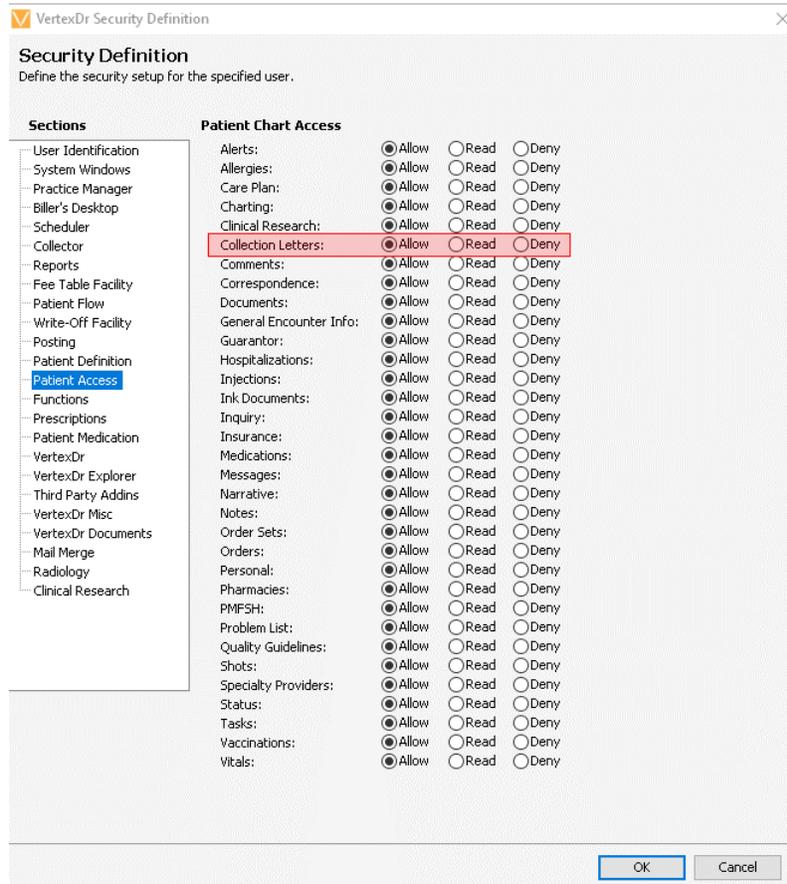
Open Full Screen: Limit Length of Multiline Textboxes:

Miscellaneous

Use legacy margins for DOC files: Save PDF file as Image:

OK Cancel

Practices can use this new option to define a Document type for collection letters. If this is enabled, there will be a new folder on the billing side of the patient chart called Collection Letters. This folder will display any document that is assigned to this document type. It is important to note that these document will still be displayed in the Documents folder, the Collection letters section is simply a way to separate them out from the rest. In addition, there is a new security option in the Patient Access section that corresponds to this new Collection Letters section.



By default, this new security option is set to Allow. As a side note, users may still be able to see the collection letters in the documents section of the chart where their settings are defined to Allow for Documents but Deny for Collection Letters. Setting Deny on the collection letters will only deny that section of the patient chart, not the inherent documents themselves.

Parameters/Collections

Definition->Parameters->Collection Parameters

There is a new option in the External Collection Agencies section of the Collection parameters called Extract with Headers. When a user performs a Transfer Accounts to External Collections, and this parameter is enabled, the csv file will now contain headers for every column.

In addition, Columns have been added for the following fields (regardless of the parameter setting):

Insurance Payment

Patient Payment

Adjustments

Lastly the provider name column has been split to display the First Name, Last Name, and Middle Initial in individual columns accordingly.

Note: *This feature is only available to those clients using the Collection Module.*

Transaction Write Off

Users can now filter by the following criteria when performing a Transaction Write Off:

- Modifiers
- Rendering Providers
- Referring Providers
- Diagnosis Codes

Note: It is important to note that if a field criterion is not specified, the system will default to ALL.

Mass Resubmission

Users can now filter by the following criteria when performing a Mass Resubmit:

- Financial Class
- Diagnosis Codes
- Modifiers
- Divisions

Note: It is important to note that if a field criterion is not specified, the system will default to ALL

Transaction Update

Place of Service

Users now have the ability to update Place of Service (POS) within the Transaction Update window.

VertexDr Transaction Update

Transaction Update
The update will only be performed on transactions that fall within all of the indicated parameters.

Transaction Update Parameters

From Date of Service: [/ /]
 To Date of Service: []
 Specific Procedure: []
 Move Charge Balance: []
 Active Insurance: [] Resubmit to active insurance
 Update Diagnosis From: []
 Specific Case Number: []
 Specific Modifier: []

Change Financial Class

Financial Class: []

Change Case Number

Case Number: []

Change Place Of Service Code

POS Code: []

Additional Update Information

Referring MD: []

Processing Flags:

- Return HCFA to office
- Remove insurance from transactions
- Assign benefits to provider
- Resubmit Secondary Electronic

Change Active Guarantor

Active Guarantor: []

OK Cancel

Import Facility

Import Facility Suspense Posting Area

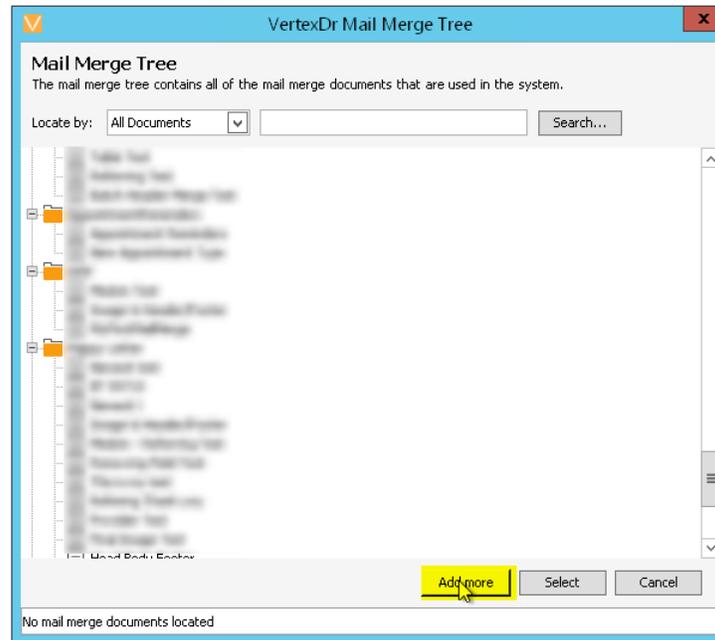
When in the Import Facility, users can now choose to release charges by Create Date. As the name applies, this option will release all charges from suspense, regardless of user or provider, that were created during the designated date range.



Mail Merge Letters

Mail Merge Letter

When selecting a Mail Merge letter template users can now select the *Add More* option from the bottom of the window. When selecting this option, the system will bring up the Mail Merge letter as it normally does, however, when the letter is saved and closed, the user will be brought back to the Mail Merge template selection window where he/she can select an addition letter to be created.



Note: The Add More button will only be available when creating a Mail Merge letter when highlighted on an Encounter or while in Charting.

Billers Desktop

Pending Notes Queue

The user may now print a UB-04 for the selected records in the Claims Pending Notes queue. A message box has been added if a patient does not have any open transactions when trying to print a UB-04.

Note: Billers Desktop is only available based to selected users.

Prescription Writer

Rx Writer

In the RxWriter, on the Favorites tab, two new columns have been added:

- Formulary Status
- Representative NDC Code

These fields will display to formulary status for the drug favorite (where applicable) and the NDC Code for the drug respectively.

Rx Writer Secondary DEA

When in the Rx Writer, if the provider has multiple DEA numbers, the system will display a DEA dropdown under the Provider name, allowing the provider to select the DEA number that he/she needs to send the prescription. This field will be defaulted to the DEA number in the Provider Definition record. It will automatically change if the state of the pharmacy that is selected matches that of a secondary DEA record for that provider.

SIG Builder & Quantity Description

Bottle and Tube are no longer available as Quantity Descriptions for prescriptions. All Liquid and Gel prescriptions will now default to Milliliters as the Quantity Description.

Definition/Pharmacies

When searching for a pharmacy by name, the results for the search string will be resulted first and then all other Mail Order Pharmacies will be resulted after the initial search results.

Definition/Prescriptions

Definitions->Security->User

When the Enable Simple Sig Definition on Form option is enabled, the user will see a green "+" icon on the Sig Route, Sig Frequency, and Sig Other fields on the sig builder window.

ABILIFY MAINTENA 300 MG INTRAMUSCULAR INJECTION, EXTENDED RELEASE ×

Name: BRUCE K PALTROW Drug: ABILIFY MAINTENA 300 MG INTRAMUSCULAR INJ
 DOB: 2/1/1945
 Wgt: 0.00

Units: 1.000 Units Max: 0.000 Form: Aerosol

Sig Route:  Sig Frequency:  Sig Other:  Days: 0 Add Sig

Quantity: 1 Quantity Description: Vial Refills: 0 Days Supply: 30 Calculate Notes To Pharmacist

Directions: 1 TABLET(S) ORALLY ONCE DAILY AS NEEDED FOR 30 DAYS

Dispensed As: Written Sample
 Lot: Exp: 01/01/1801
 Is chronic Add to favorites...
 Problem:
 Prescription Monitoring Viewed [Prescription Monitoring](#)

Once a Form is selected (Tablet, Capsule, etc), the user can click the new icon to add a custom route, frequency or other.

The screenshot shows a dialog box titled "VertexDr Drug Sig Definition" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Drug Sig Definition**: Definition information for a drug sig.
- Sig Code**: A text input field.
- Description**: A text input field.
- Dosage Interval**: A dropdown menu currently set to "Undefined".
- Day Interval**: A text input field containing the value "0".
- Dose Per Day**: A text input field containing the value "0".
- Sig Filter**: A dropdown menu currently set to "Vial".
- SigType**: A dropdown menu currently set to "Route".
- FormDescription**: A dropdown menu currently set to "Aerosol".

At the bottom of the dialog, there are three buttons: "Activate", "OK", and "Cancel".

It is important to note that these custom fields will only be available for that designated Form and the sigs will only be permanently saved once the user clicks the Add Sig button.

Note: Please reference VertexDr 9.1 Prescription Manual for additional prescription updates.

Medcin

Pre-Filled Narrative Window

Users can now maximize the Encounter/Narrative window while in Charting.