VertexDr

Version 9.0
User Guide

APPLICATION MANUAL

vertexdr.com

a **MERIDIAN MEDICAL MANAGEMENT** company

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Certification Update

On October 18, 2018, Meridian Medical Management was certified to stage 3 meaningful use requirements via the Drummond Group. More details regarding the certification can be found on the official Certified Health Product list here:
https://chpl.healthit.gov/#/product/9694

Definitions

Insurance Carrier

The system will now enable the Active Only checkbox by default when viewing the Insurance Carrier Table.

Portal

Definition->Parameters->Third Party Settings->Portal Settings
In the Portal Settings window called **Send CCD to Portal When Encounter is Signed**. When this option is enabled, the system will send a patients CCD record to a tickler table whenever an encounter is signed. The portal service will then send that CCD to the patient's portal account during its next run.

Patient Chart

Definition->Parameters->System Wide Defaults
In the VertexDr 2 section of the System Wide Defaults there is an option called ***Chart Config***. By using this, practices can now define what sections of a patient chart are visible as well as the order of the sections.
Active Tasks
Alerts
Allergies
Chart Summary
Correspondence
Documents
Encounters
Hospitalizations
Injections
Ink Documents
Medications
Messages
Orders
Past Medical Family/Social History
Pharmacies
Problem List
Quality Guidelines
Specialty Providers
Vaccinations
Vitals

Note: It is important that if a user has anything chart configuration defined in the security record, the security record settings will override whatever is set at the system level.

Encounters

Definition->Parameters->System Wide Defaults>VertexDr 2
In the VertexDr Section of System Wide Defaults there is an option called ***Display Signature.*** If this setting enabled the electronic signature o will display when the user prints the encounter at the bottom of each page. This will fall in the area labeled *Signature*.

Appointment Reminders

Definition->Parameters->Appointments
When a user changes the layout of a custom form template that is used for email reminders, the updates will be automatically applied when sending out new reminders. Previously, users had to either create a new template or select a different template in the appointment reminder definition, save, exit, and reselect the original template.

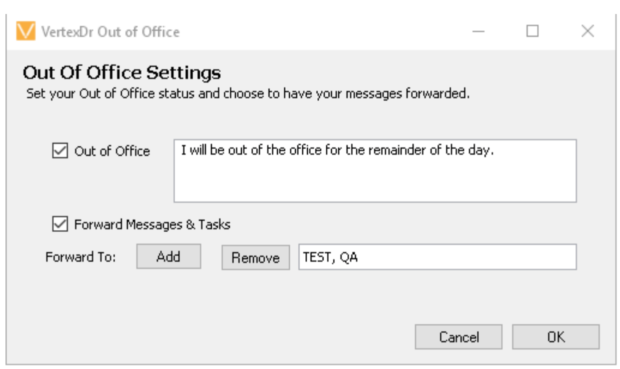
CCDA Export

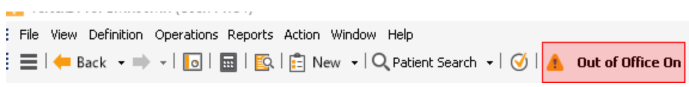
Users without access to Medcin Charting will no longer have access to export CCDA's. This setting is located in Definition->Security->Users->VertexDr

Messages\Tasks

Out of Office

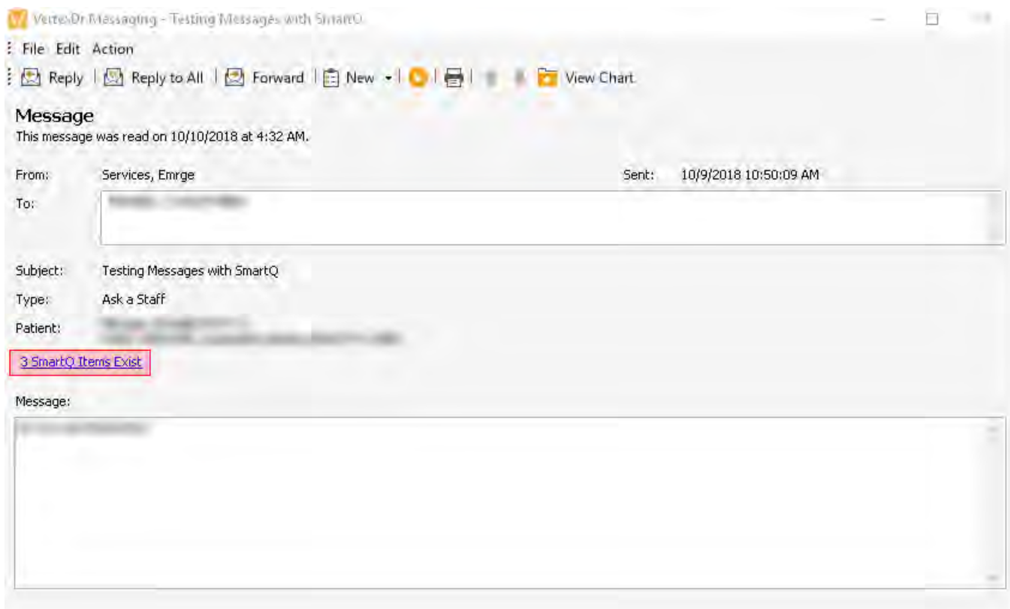
Users can now set themselves as Out of Office from within the Messages and Tasks desktop areas. From either area, the user can click the Out of Office button from the toolbar. The user can then define whether or not he/she is out of the office, a short response message and a recipient to forward messages and tasks to while the Out of Office flag is enabled. Once enabled, the Out of Office button will show up in bold to signify that Out of Office functionality is currently on.





Smart Q

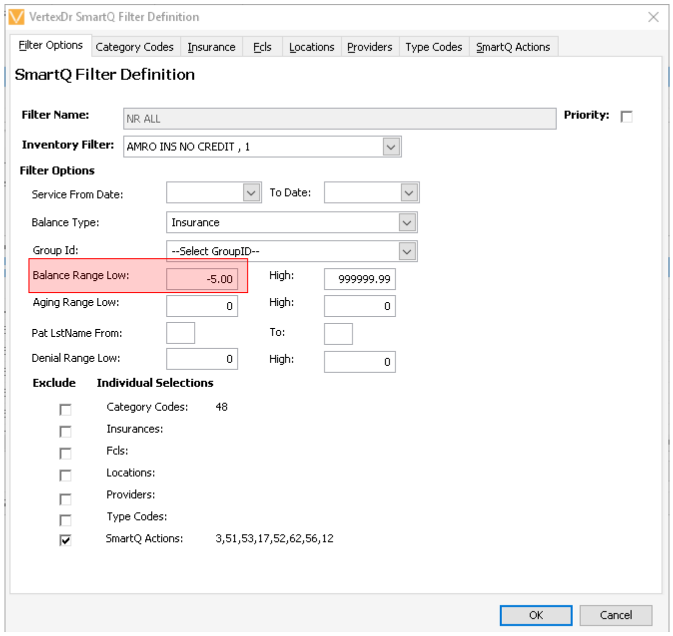
If a user sends a message for a patient that has records in the SmartQ, a link will be visible in the message window stating how many items in the SmartQ are related to that patient. The user can then click on the link to view the SmartQ records and perform any action if desired on a given SmartQ record. It is important to note that the link will only show up once the message has been sent and that the user will only see the link if he/she has access to the SmartQ as defined in their security record.



Smart Q Filters

Definition->Office->SmartQ->SmartQ Filters
Definition->Office->SmartQ->Manager Inventory Assignment

Practices can now define SmartQ filters with Balances that have negative values.



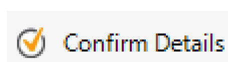
Appointments

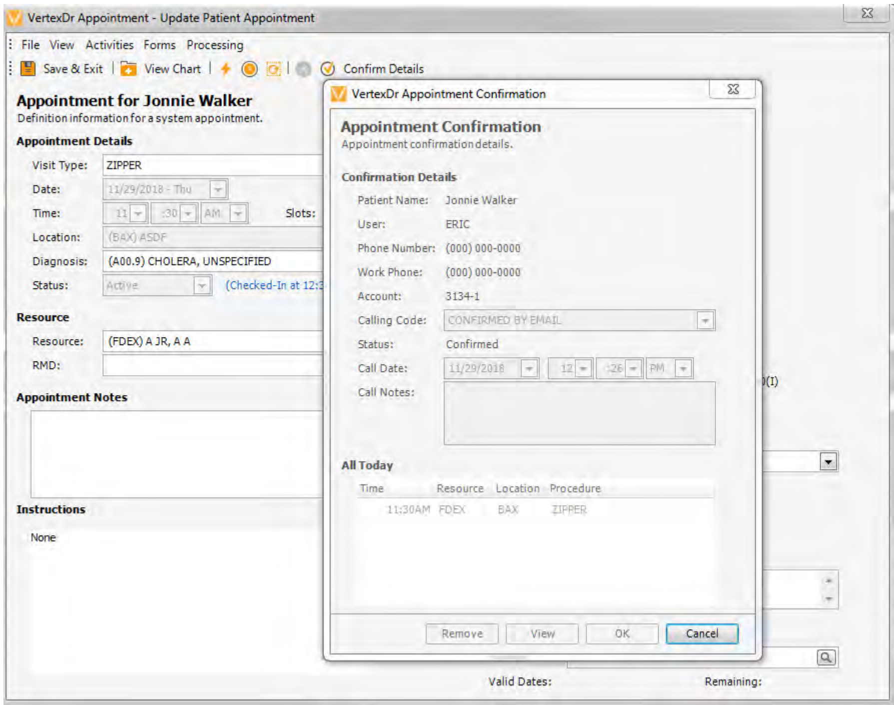
Check In Window

The Patient and Insurance balances are now displayed at the bottom of the patient check-in window. In addition, the balances will also be displayed in the patient header within the patient chart.

Confirmation Status

Users will now be able to view the Confirmation Details after a patient is checked in, by clicking the Confirmation Details Button in the Appointment window. These details will be read only.





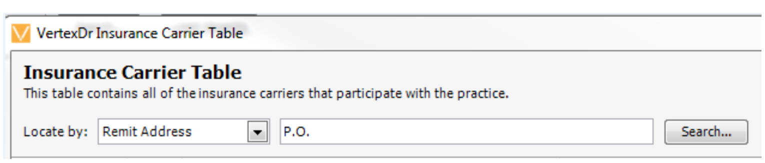
Mail Merge

User can now print out Mail merge letters based on appointments. When in the appointment scheduler, users can go to Reports->Forms and Labels->Appointment Letters. From here users can filter based on a multitude of criteria including Date/Time, Provider, Location, and Visit Type. Once filtered, the user will be prompted to select a Mail Merge template. a mail merge letter will then be created for each appointment that matches the desired filters. It is important to note that unlike the Patient Query Facility, this report is based on unique appointments, not unique patients. This means that if a patient has multiple appointments that fall into the filtered criteria, he/she will receive a mail merge letter for each separate appointment.

Patient Chart

Insurance Definition

Users now have the ability to search for an Insurance Remit Address while entering a patient's Insurance.



Wait List Notification

In the header of the patient demographics and the patient chart, there is now an indicator that shows whether or not the patient is on the Appointment Wait List.

Allergies NKDA Status

Users can now set a patient's NKDA status by right clicking in the patient's allergy section of the chart and selecting the Set Patient to NKDA option.

Copying Medications

When in the medications section of the patient chart, users can right click on the grid and select a new option called, **Copy All Active Medications to Chart Notes**. When selected, the user will be prompted to select an open encounter for which the medications will be copied into under the Current Medications narrative header. If the user selects an encounter that is currently open or locked, he/she will get a message stating that the encounter is locked and the medications will not be copied to the encounter.

Orders & Orders Desktop Area

When creating an order, users can now select a lab type of Other. Also in the Orders desktop area, users can now filter by order type; Labs, Imaging, Other.

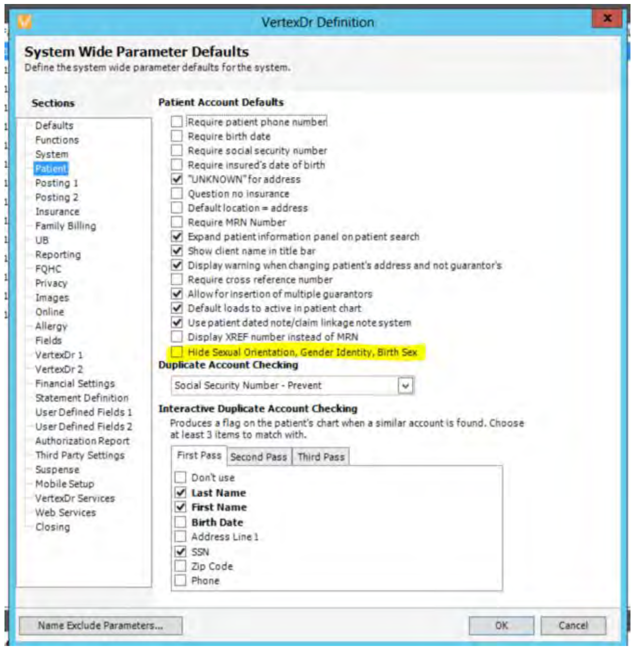
CCDA Reconciliation

The CCDA Problem List, Allergy, Medication Reconciliation parsing process has been adjusted in order to be more simplified and to meet new guideline standards for meaningful use. There are not front end changes for the end user.

Demographics

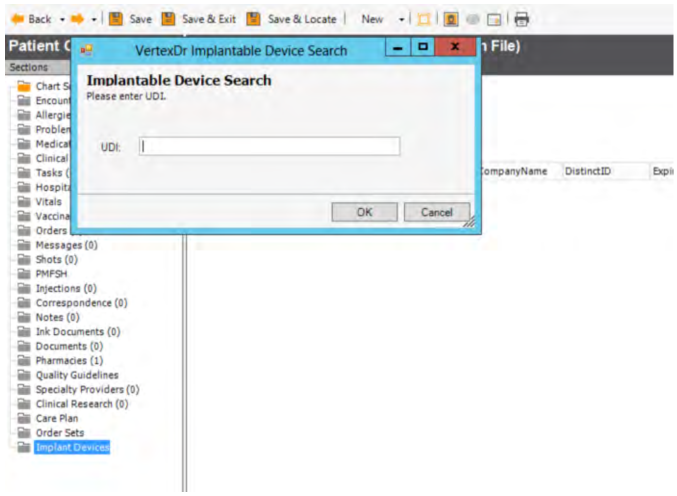
New fields are available in the patients' demographics are of the chart. Options added are Sexual Orientation, Gender Identity, Birth Sex, Multiple Birth and Birth Order.

These new demographic fields can be hidden in Definition->Parameters->System Wide Defaults->Patient:


VertexDr Definition
System Wide Parameter Defaults
Define the system wide parameter defaults for the system.
Sections
Defaults
Functions
System
Patient
Posting 1
Posting 2
Insurance
Family Billing
UB
Reporting
FQHC
Privacy
Images
Online
Allergy
Fields
VertexDr 1
VertexDr 2
Financial Settings
Statement Definition
User Defined Fields 1
User Defined Fields 2
Authorization Report
Third Party Settings
Suspense
Mobile Setup
VertexDr Services
Web Services
Closing
Patient Account Defaults
Require patient phone number
Require birth date
Require social security number
Require insured's date of birth
"UNKNOWN" for address
Question no insurance
Default location = address
Require MRN Number
Expand patient information panel on patient search
Show client name in title bar
Display warning when changing patient's address and not guarantor's
Require cross reference number
Allow for insertion of multiple guarantors
Default loads to active in patient chart
Use patient dated note/claim linkage note system
Display XREF number instead of MRN
Hide Sexual Orientation, Gender Identity, Birth Sex
Duplicate Account Checking
Social Security Number - Prevent
Interactive Duplicate Account Checking
Produces a flag on the patient's chart when a similar account is found. Choose at least 3 items to match with.
First Pass
Second Pass
Third Pass
Don't use
Last Name
First Name
Birth Date
Address Line 1
SSN
Zip Code
Phone
Name Exclude Parameters...
OK
Cancel

Implantable Device List

A new section of the patient's chart has been added to record implantable devices. Devices can be added to this list by clicking on the "New" button and typing in the implantable device unique identifier (UDI)

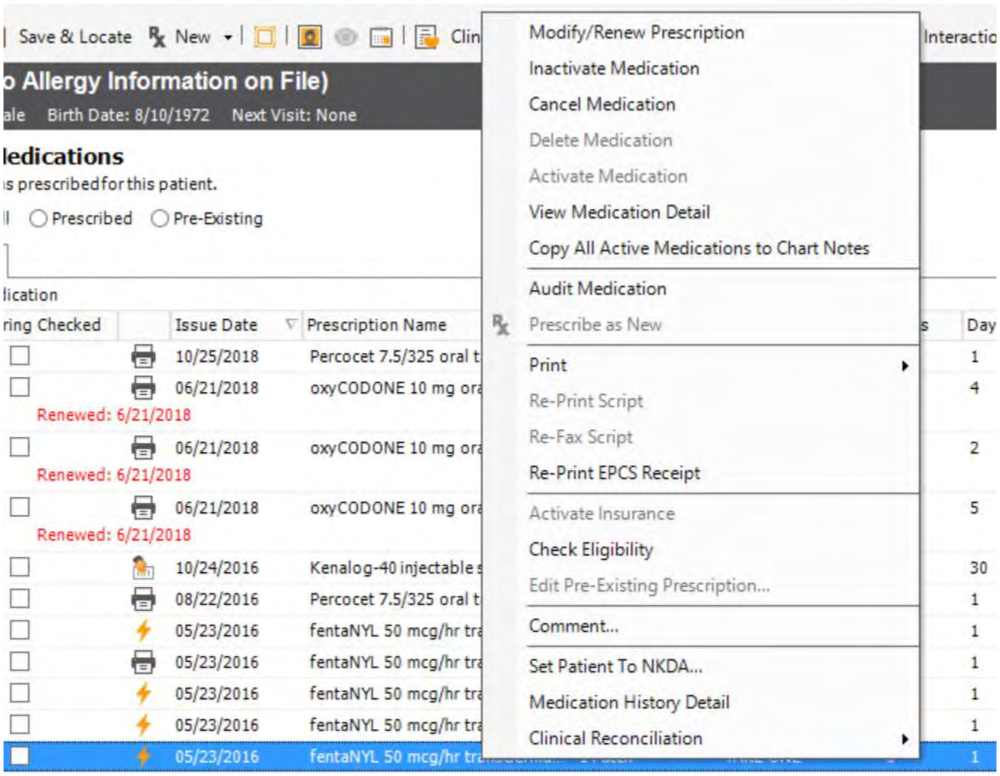


Patient Education

The *Send to Portal* button is available when the InfoButton is invoked (available in problem list, medications, and allergies) that will allow patient education to be sent to the portal:

Prescriptions

A new feature for cancelling electronic prescriptions has been added to the right click menu inside prescriptions:



Clicking this new "Cancel Medication" button will recall a prescription that has been sent electronically if the medication has not yet been picked up. You will receive a message if the prescription is successfully cancelled.

Documents

Signing

Users can now sign multiple documents simultaneously while within a patient's chart. To do so simply CTRL or SHIFT +.

Click to select the pages you want to sign and click the Sign button from the tool bar. The comment you enter will be applied to all selected documents when signed.

Charting

Previous Encounters/Pre Filled Narratives

While in charting, users can now maximize the Encounters/Prefilled Narrative window for better viewing.

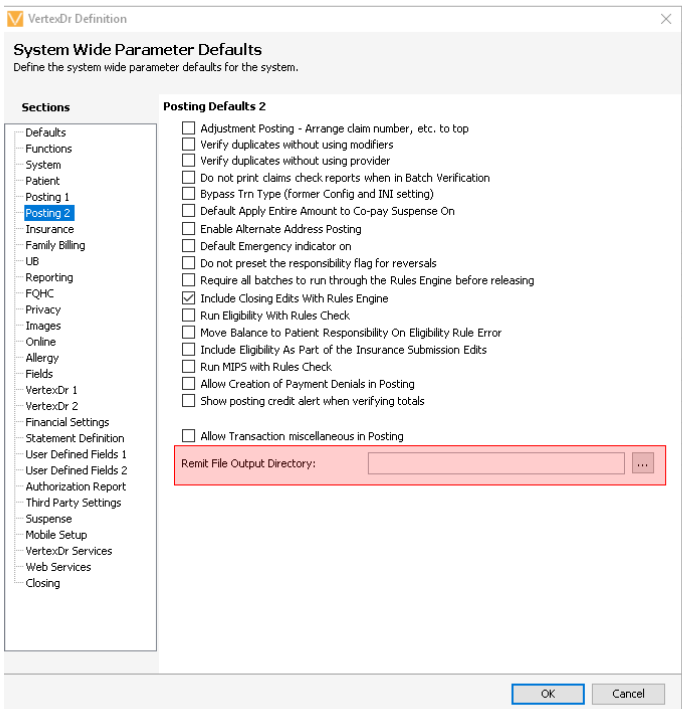
Charge Capture

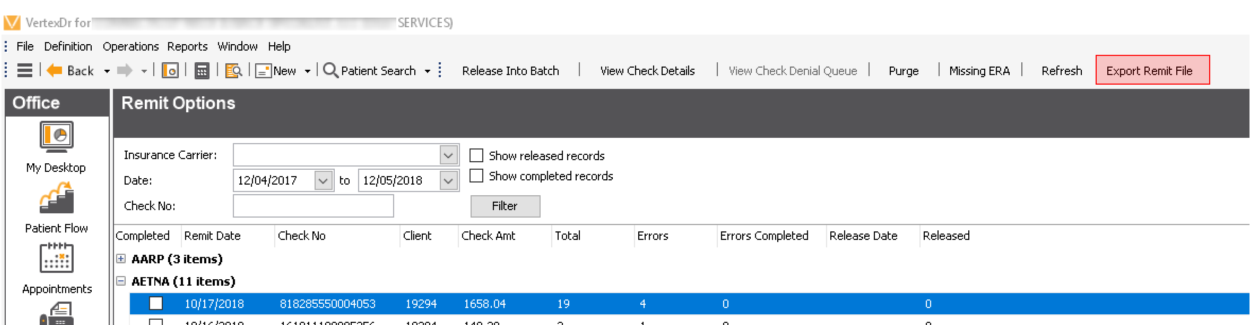
The system will now show only active providers when assigning providers to a charge within Charge Capture.

Remit Facility

Remit Export

Definition->Parameters->System Wide Defaults
There is a new option on the Posting 2 tab of the System Wide Defaults called Remit File Output Directory. Practices can define a central location for which they can export ERA files directly from Remit. While in the Remit Facility a user can highlight a remit record and click the Export Remit File button from the toolbar. Please note that at this time, users can only export one file at a time.





Reporting

New Appointments Added

Reports->New Appointments Added

The total amount of appointments in the New Appointments Added report will now show the proper total.

QRDA Import

Reports->MIPS/MU

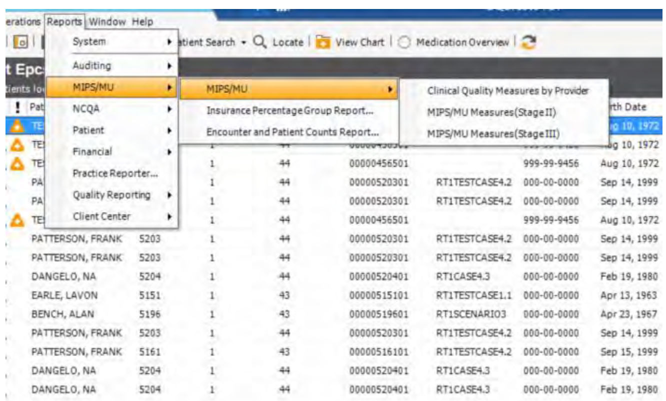
The MIPS/MU Reports Menu has been consolidated for ease of use. In addition the Stage I reports are now obsolete and have been removed as options.

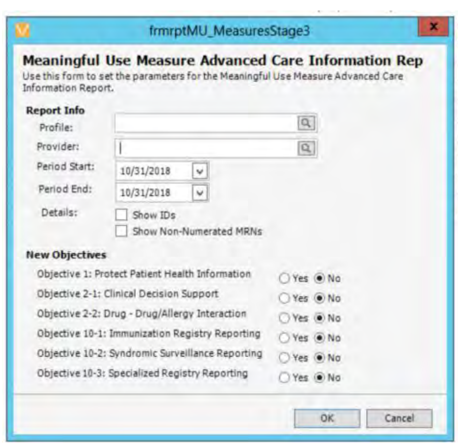
File->Import QRDA

Users can now import QRDA files directly into the application. The import tool will create new patient records for each patient found in the QRDA file and import demographics, encounters, allergies, diagnosis, and medications.

MIPS/MU Reports

There is a new option under MIPS/MU Reporting for Stage III reports:





Current Reporting options include Objective 2 (Electronic Prescribing), and Objective 5 (Patient Education). Further reporting options will be added in subsequent releases.

Objective 2 patients will numerate if they are seen within the reporting period, they are written an electronic prescription, and their formularies have been queried.

Objective 5 patients will numerate if they are seen in the reporting period and the “send to portal” button is used when patient education is invoked from the patient’s problem list: