

Version 9.0 User Guide

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.

File View Definition Opera	tions Reports Action Window Help	
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	✓ VertexDr Out of Office	
	Out Of Office Settings Set your Out of Office status and choose to have your messages forwarded.	
	Out of Office I will be out of the office for the remainder of the day.	
	Forward Messages & Tasks Forward Tu:	
	ronwaru to. Adu nemove icol, QA	
	Cancel OK	

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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.

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Testing Messages with SmartQ	
Ask a Staff	
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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.

SmartQ Filter Definition Filter Name: Inventory Filte:: AMRCO INS NO CREDIT, 1 Filter Options Service From Date: Service From Date: Insurance Service From Date: Service From:	ilter Options	Categ	gory Codes	Insurance	Ecls	Locations	Providers	Type Codes	SmartQ Actions		
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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.



Appointment for Jonnie Walker Definition information for a system appointment. Appointment Details Visit Type: ZIPPER Date: 11/29/2018 Thu - Time: 11/29/2018 Thu - Date: 11/29/2018 Thu - Date: 11/29/2018 Thu - Date: 11/29/2018 Thu - Date: 11/29/2018 Thu - Diagnosis: (Add) > CholERA, UNSPECIFIED Diagnosis: (Add) > CholERA, UNSPECIFIED Status: Active			VortevDr Annointr	mant Confirmation	-	23	
Visit Type: ZIPFER Date: 11/27/2018 Tho + Interview 11 + Confirmation Details Patient Name: Jonnie Walker User: ERC Phone Number: (00) 000-0000 Work Phone: (00) 000-0000 Work Phone: (00) 000-0000 Account: 3134-1 Call Date: (1/29/2016 - 112 + 126 + PM + Call Date: (1/29/2016 - 112 + 126 + PM + Call Date: (1/29/2016 - 112 + 126 + PM + Call Date: (1/29/2016 - 112 + 126 + PM + Instructions Instructions Instructions None Instructions Instructions	Appointme Definition inform Appointment I	nt for Jonnie Walker nation for a system appointment. Details	Appointment C	Confirmation ation details.			
All Today Time Resource Location Procedure Time Resource Location Procedure Tit/20AM FOEX BAX ZIPPER	Visit Type: Date: Time: Location: Diagnosis: Status: Resource Resource: RMD: Appointment I	ZIPFER 11/29/2018 - Thu + 11 + -30 + AM. + Slots: (BAX) ASDF (A00.9) CHOLERA, UNSPECIFIED Active - (Checked-In at 12:3) (FDEX) A JR, A A	Confirmation Detail Patient Name: 3 User: E Phone Number: (Work Phone: (Account: 3 Calling Code: Status: C Call Date: Call Notes:	is Joonie Walker ERIC (2000) 000-0000 3134-1 Confirmed 11/20/2018 -	p	-	D)
Time Resource Location Procedure Instructions 11:30AM FDEX BAX ZIPPER			All Today				•
None	Instructions		Time Re 11:30AM FD	DEX BAX	Procedure ZIPPER	_	
	None					-	
Remove View OK Cancel			R	emove View	OK C	ancel	

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.

VertexDr Insurance Carrier Table	
Insurance Carrier Table This table contains all of the insurance carriers that participate with the practice.	
Locate by: Remit Address P.O.	Search

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.

Sally Berlin (Allergies Exist) Protected PHI Exists 35 Year Old Female Birth Date: 10/12/1982 Next Visit: 10/31/2018 In Wait List: Yes

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.

Status:	Normal	~	Sexual Orientation:	Unknown	~
Marital:	Single	~	Gender Identity:	NotDisclosed	~
Employment:	Unknown	~	Birth Sex:	Unknown	~
Guarantor:	Self	~	Multiple Birth:	⊖Yes No	
Language:			Birth Order:	0	

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

System Wide Para Define the system wide para	imeter Defaults rameter defaults for the system.
Sections	Patient Account Defaults
Defaults Functions System Patient Assting 1 Assting 1 Assting 1 Assting 1 Assting 1 Assting 1 Assting 1 Assting 1 Assting 2 Assting 2 Assting 2 Assting 2 Assting 2 Fields VertexDr 1 VertexDr 1 Verte	Require patient phone number Require sold security number Require MRN Number Sepada Deteint information panel on patient search Show client name in title bar Display warning when changing patients address and not guarantor's Require cross reference number Allow of insection dative in patient chart Use pada dative in patient chart Use pada dative in patient chart Use pada vREF number instead of MRN Hede Sequed Onestation, Gender Lerphy, Birth Sex Deplay XREF number - Prevent Social Security Number - Prevent
User Defined Fields 1 User Defined Fields 2 Authorization Report	Interactive Duplicate Account Checking Produces a flag on the patient's chart when a similar account is found. Choose at least 3 litems to match with.
Third Party Settings Suspense Mobile Setup VertexDr Services Web Services Closing	First Pass Second Pass Don't use If the transmitted of the transmitted of the transmitted of the transmitted of tra

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:

Save & Loca	ate B	New +	🚺 🙍 💿 📑 🛛 🔂 Clin		Modify/Renew Prescription	Int	eractio
o Allergy	nfor	mation or	n File)		Inactivate Medication		
ale Birth Dat	te: 8/1)/1972 Next	Visit: None		Cancel Medication	- 88	
ledication is prescribed fo I O Prescrib	s orthis ed (oatient.) Pre-Existing			Delete Medication Activate Medication View Medication Detail Copy All Active Medications to Chart Notes		
lication	_				Audit Medication		
ring Checked		Issue Date	∇ Prescription Name	R.	Prescribe as New	s	Day
		10/25/2018	Percocet 7.5/325 oral t		Print		1
Renewed:	6/21/2	06/21/2018 018	oxyCODONE 10 mg ora		Re-Print Script		4
Renewed:	6/21/2	06/21/2018	oxyCODONE 10 mg ora		Re-Fax Script Re-Print EPCS Receipt		2
Renewed:	6/21/2	06/21/2018	oxyCODONE 10 mg ora	ā	Activate Insurance		5
	2	10/24/2016	Kenalog-40 injectables		Check Eligibility		30
	-	08/22/2016	Percocet 7.5/325 oral t		Edit Pre-Existing Prescription	_	1
	4	05/23/2016	fentaNYL 50 mcg/hr tra		Comment		1
	-	05/23/2016	fentaNYL 50 mcg/hr tra		Set Patient To NKDA		1
	+	05/23/2016	fentaNYL 50 mcg/hr tra		Medication History Detail		1
	+	05/23/2016	fentaNYL 50 mcg/hr tra		Clinical Reconciliation		1
	4	05/23/2016	fentaNYL 50 mcg/hr tra	-			1

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.

	VertexDr Definition	×	
	System Wide Para Define the system wide para	meter Defaults meter defaults for the system.	
	FP	Danking Defaults 2	
	Sections	Posting Denaulics 2	
	Functions	Verify duplicates without using modifiers	
	- System Patient	Do not print claims check reports when in Batch Verification	
	Posting 1	Bypass Trn Type (former Config and INI setting) Default Apply Entire Amount to Co-pay Suspense Op	
	Insurance	Enable Alternate Address Posting	
	- Family Billing - UB	Default Emergency indicator on Do not preset the responsibility flag for reversals	
	Reporting	Require all batches to run through the Rules Engine before releasing	
	Privacy	✓ Include Closing Edits With Rules Engine Run Eligibility With Rules Check	
	- Images Online	Move Balance to Patient Responsibility On Eligibility Rule Error	
	Allergy	Include Eligibility As Part of the Insurance Submission Edits Run MIPS with Rules Check	
	VertexDr 1	Allow Creation of Payment Denials in Posting Show posting credit elect when verifying totals	
	VertexDr 2 Financial Settings		
	 Statement Definition User Defined Fields 1 	Allow Transaction miscellaneous in Posting	
	User Defined Fields 2	Remit File Output Directory:	
	Third Party Settings		
	Mobile Setup		
	VertexDr Services		
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e Remit Options			
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Desktop Date: 12/04/	2017 v to 12/05/2018	Show completed records	
Check No:		Filter	
ent Flow Completed Remit Date	Check No Clien	Check Amt Total Errors Errors Completed Release Date Released	
AARP (3 items)			
intments			
10/17/2018	818285550004053 1929	4 1658.04 19 4 0 0	

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:

rat	ions R	eports Window He	lp.	_					
0	System + at		tient Search 🔹 🔍 Locate 🛅 View Chart 🔿 Medication Overview 🥭						
E	pc	Auditing +		-			-	-	-
ent	5 10	MIPS/MU		MIPS/M	MIPS/MU.		Clinical Quality Measures by Provider		
!	Pat	NCQA Patient		Insuran	ce Percentage Gro ter and Patient Co	up Report	MIPS/MU Measures(Stage II) MIPS/MU Measures(Stage III)		rth Date
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۵	TE	Desetion Deserts		1	-44	00000456501		999-99-9456	Aug 10, 1972
	PA	Fractice Reports	51 ····	1	-44	00000520301	RT1TESTCASE4.2	000-00-0000	Sep 14, 1999
	PA	Quality Reportin	¢ ,	1	44	00000520301	RT1TESTCASE4.2	000-00-0000	Sep 14, 1999
۵	TE	Client Center		1	44	00000456501		999-99-9456	Aug 10, 1972
	PATTERSON, FRANK 5203		203	1	44	00000520301	RTITESTCASE4.2	000-00-0000	Sep 14, 1999
	PATT	ERSON, FRANK 5	203	1	44	00000520301	RT1TESTCASE4.2	000-00-0000	Sep 14, 1999
	DAN	GELO, NA 5	204	1	-44	00000520401	RT1CASE4.3	000-00-0000	Feb 19, 1980
	EARL	E, LAVON 5	151	1	43	00000515101	RT1TESTCASE1.1	000-00-0000	Apr 13, 1963
	BENG	H, ALAN 5	196	1	43	00000519601	RT1SCENARIO3	000-00-0000	Apr 23, 1967
	PATT	ERSON, FRANK 5	203	1	44	00000520301	RT1TESTCASE4.2	000-00-0000	Sep 14, 1999
	PATT	ERSON, FRANK 5	161	1	43	00000516101	RT1TESTCASE4.2	000-00-0000	Sep 15, 1999
	DAN	GELO, NA 5	204	1	44	00000520401	RT1CASE4.3	000-00-0000	Feb 19, 1980
	DAN	GELO, NA 5	204	1	.44	00000520401	RT1CASE4.3	000-00-0000	Feb 19, 1980

Use this form to set the parameters for the Meaningful Information Report.	Use Measure Advanced Care						
Report Info Profile: Deputden	<u> </u>						
Period Start: 10/31/2018 V Period End: 10/31/2018 V Details: Show IDs Show Non-Numerated MRNs							
New Objectives Objective 1: Protect Patient Health Information Objective 2-1: Clinical Decision Support Objective 2-2: Drug - Drug/Allergy Interaction Objective 10-1: Immunization Registry Reporting Objective 10-3: Specialized Registry Reporting	 Yes ● No 						

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:

