



v7.6 Release Notes



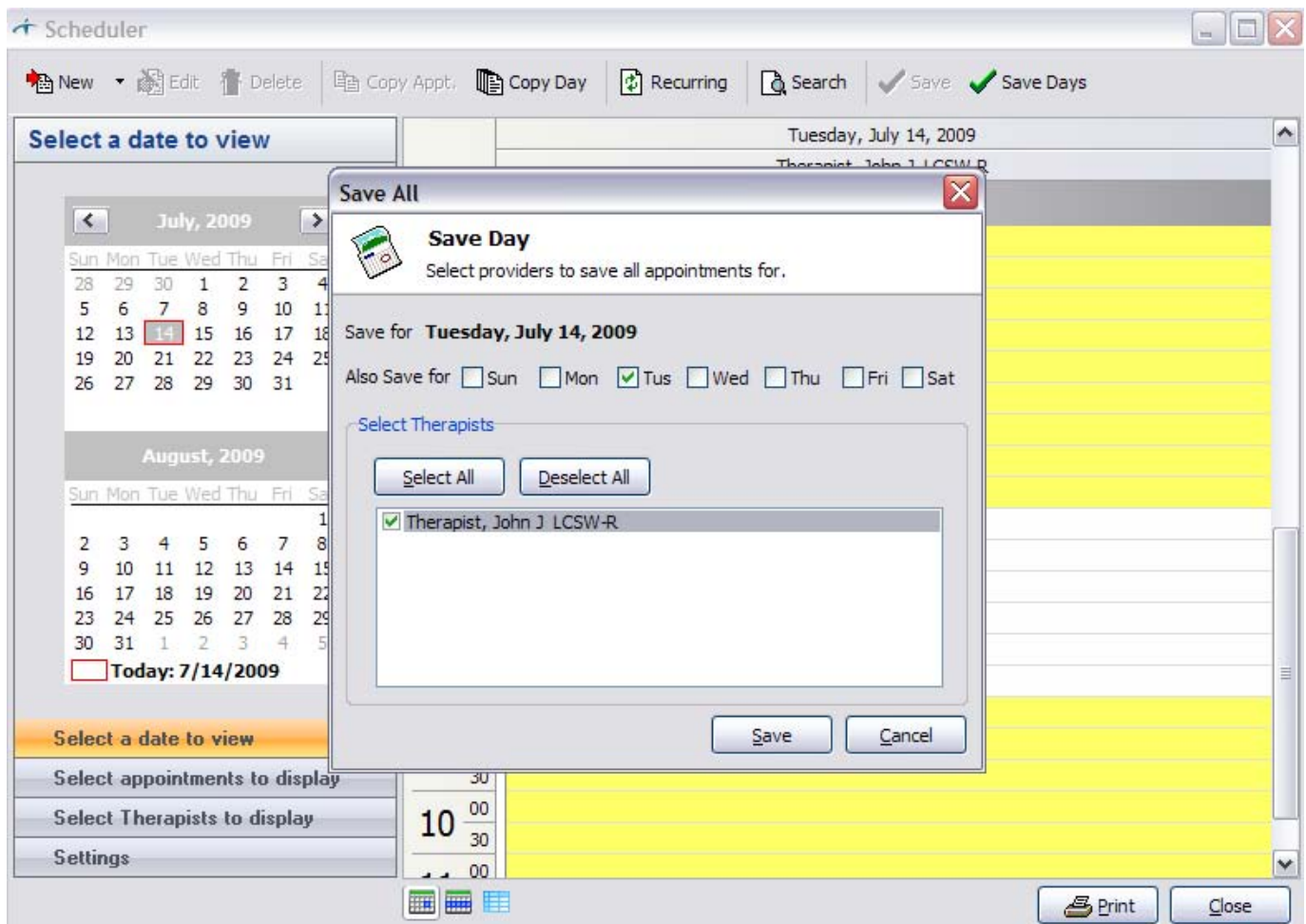
www.helper.com

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Scheduler Enhancements

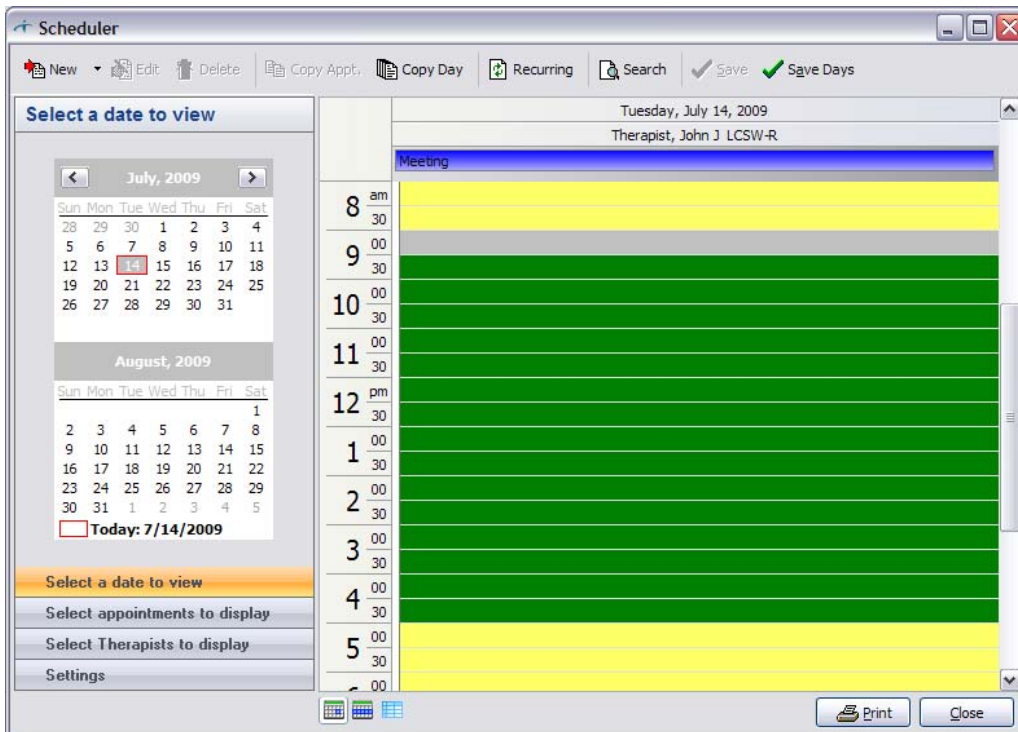
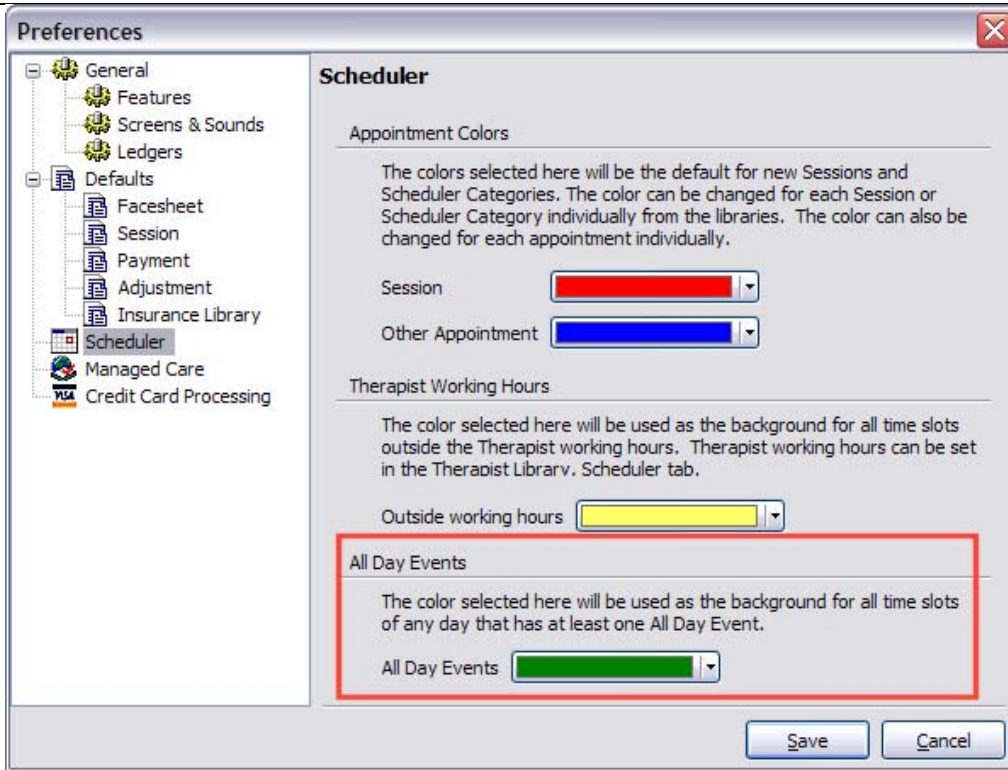
Multi-Day Save options

In previous versions of Helper, there was an option in Scheduler to “Save Day” or “Save Week.” The latter was a convenient way to save an entire week’s worth of sessions, however if you accidentally pressed this button instead of Save Day, it was very difficult to undo. This feature has been improved. Now when the Save Day button is pressed, the screen that comes up includes check boxes for each day of the week. The current day is selected by default and you are able to select additional days you would like to save.



Color enhancements for All Day Events

When you schedule an all day event such as Vacation, it shows at the top of the day. We have now also added a new color selection under Setup, Preferences, Scheduler for days that have an All Day Event so that they are more easily recognized in Scheduler.



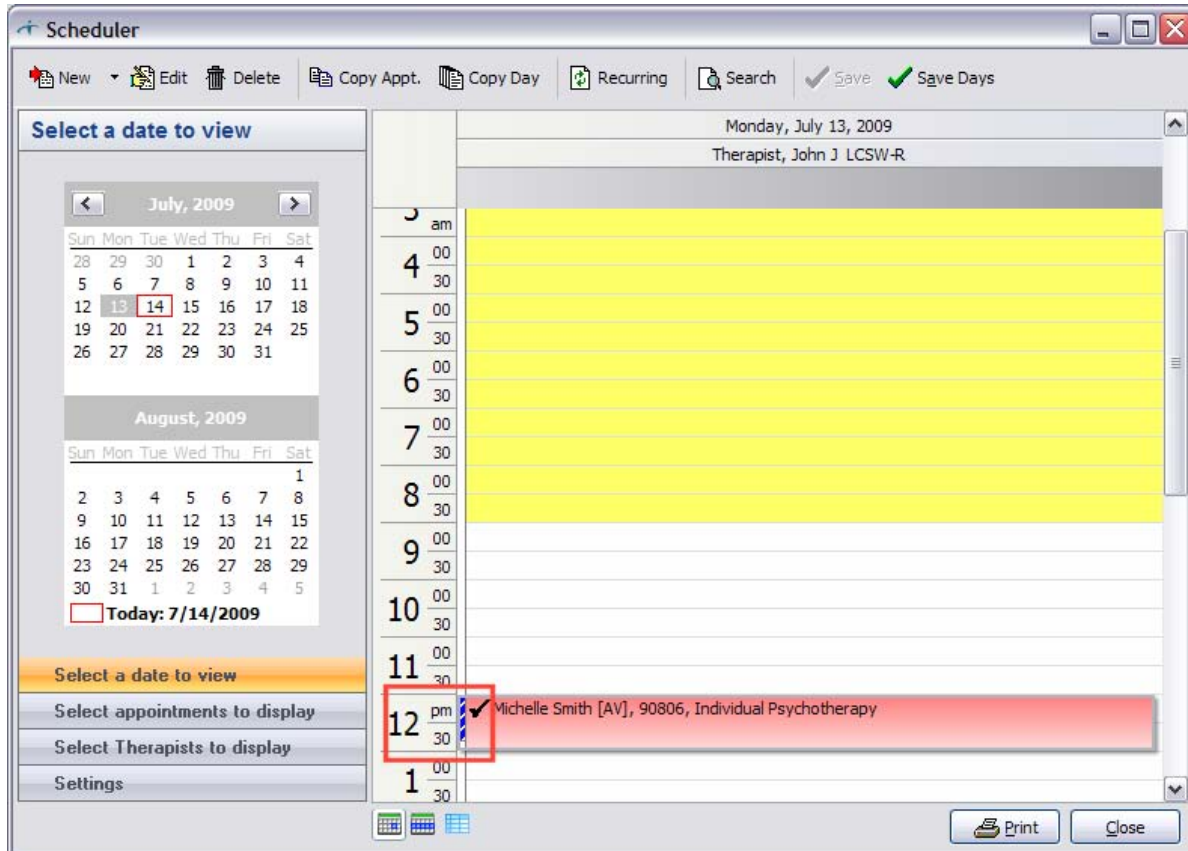
Default Scheduler to the current time

In previous versions of Helper, when opening Scheduler it defaulted to the start of the work day. This has been improved to now showing the current time 1/3 of the way down the screen when opening Scheduler. This minimizes the amount of scrolling the user is required to do.

Easier to identify completed appointments

Previously, there were 2 features to differentiate between an incomplete and a complete appointment: a check mark at the beginning of the text of the appointment and the appointment color changing to a lighter shade.

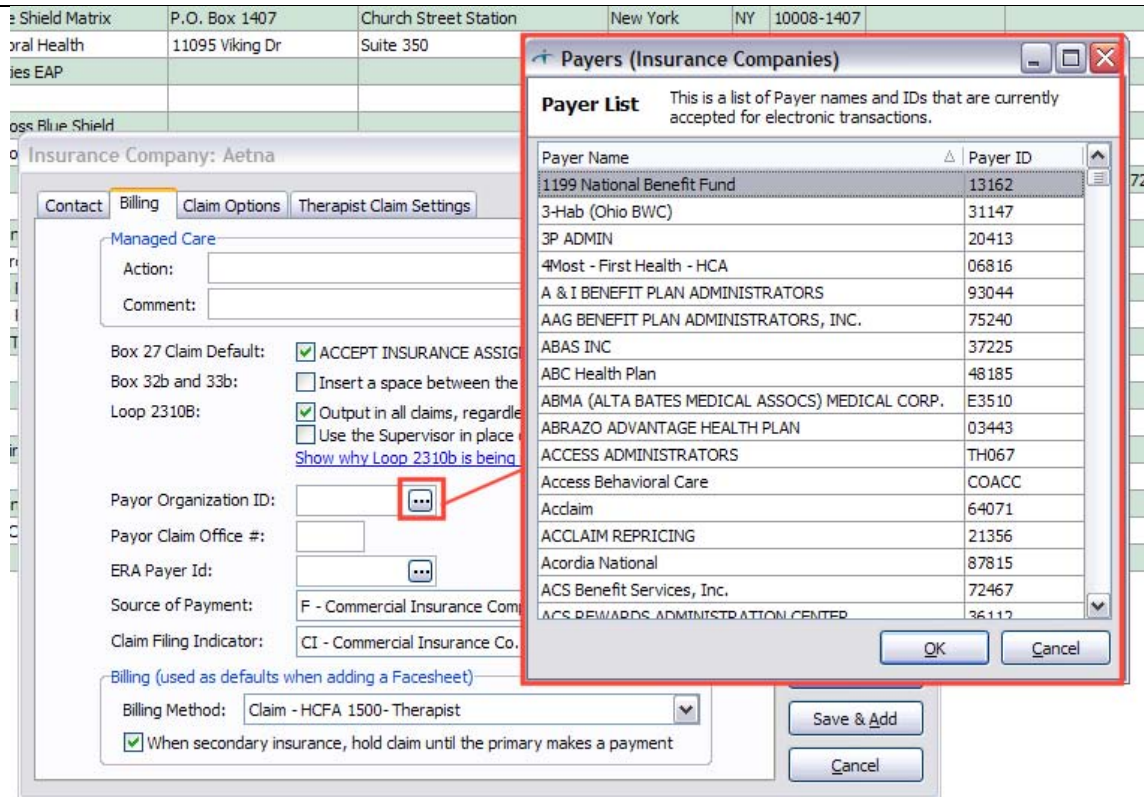
There is now an additional indicator. The *Busy* bar, which is a vertical bar on the left edge of the appointment showing the time frame of the appointment, will change from a solid blue to a patterned blue when the appointment is completed.



Claims Processing Enhancements

Payer ID list access from Insurance Company Library

It is often difficult for users to find the correct payer ID when adding a new insurance company to the Insurance Company Library. The list is available in ClaimsConnect which requires the user to open ClaimsConnect, find the proper ID, write it down, and then type it into Helper. This list can now be accessed via the Insurance Company library in Helper, eliminating the need to launch ClaimsConnect separately.



1500 Claim Form Guidance

The information that is printed on a 1500 claim form is located in many different sections of Helper. In most places, a red number is provided next to the field in Helper that corresponds with the field on the 1500 claim form. This helps the user find the proper place to enter information, but it's still required to know what screen to go to first. Finding the right place to go can be difficult.

We now provide a screen that displays an image of a 1500 claim form as well as a help section. The claim form is pre-populated with a link. When clicked, the help section of the screen is updated with the location in Helper the information is entered as well as a description of the field.

Insurance Companies: Michelle Smith

Primary Insurance Co. Secondary Insurance Co.

1. Type of Ins. [v] Ins. Type Code [v]

1a. Insured's ID Number Insurance Company SS Number
 [] Aetna [] []

4. Insured's Name (Last, First, Middle) Smith Michelle

6. Patient Relationship to Insured Self [v]

7. Insured's Address (No., Street) 123 Helper Rd.
 []
 City, St., Zip Boston MA 02134
 Telephone (Home) Home (617) 673-2321 Business () -

10d. Reserved for Local Use []

11. Insured's Policy, Group, or FECA Number 13. Insured's or Authorized Person's Signature
 [] Signed [] Default

a. Date of Birth Sex Date // []
 Male Female

b. Employer's or School's Name 19. Reserved for Local Use
 [] []

c. Insurance Plan Name 27. Accept Insurance Assignment?

d. Is There Another Health Plan? E-mail [v] []

Buttons: Champus, Copy From..., Clear Page, Archive Ins. Co., **Claim Guidance**, Cancel, Save, Save & Add, Save & Copy

Claim Guidance

Where does the information on a claim come from? Use the selections below to find out.

1. MEDICARE <input checked="" type="checkbox"/> MEDICAID <input checked="" type="checkbox"/> TRICARE CHAMPUS <input checked="" type="checkbox"/> CHAMPVA <input checked="" type="checkbox"/> GROUP HEALTH PLAN <input checked="" type="checkbox"/> FECA BLK LING <input checked="" type="checkbox"/> OTHER <input checked="" type="checkbox"/>	1a. INSURED'S I.D. NUMBER (For Program Item 1) InsIDNumber
2. PATIENT'S NAME (Last Name, First Name, Middle Initial) PatLast, PatFirst, MI	4. INSURED'S NAME (Last Name, First Name, Middle Initial) InsLast, InsFirst, MI
5. PATIENT'S ADDRESS (No., Street) Patient Street CITY Patient City STATE NY ZIP CODE Pat Zip TELEPHONE (Include Area Code) (555) PAT-PHON	7. INSURED'S ADDRESS (No., Street) Insured Street CITY Insured City STATE NY ZIP CODE Ins Zip TELEPHONE (Include Area Code) (555) INS-PHON
8. OTHER INSURED'S NAME (Last Name, First Name, Middle Initial) OtherLast, OtherFirst, MI	11. INSURED'S POLICY GROUP OR FECA NUMBER InsPolicyNBR
a. OTHER INSURED'S POLICY OR GROUP NUMBER OthPolicyNBR	a. INSURED'S DATE OF BIRTH SEX MM DD YY M X F X
b. OTHER INSURED'S DATE OF BIRTH SEX MM DD YY M X F X	b. EMPLOYER'S NAME OR SCHOOL NAME Insured Employer
c. EMPLOYER'S NAME OR SCHOOL NAME Patient Employer	c. INSURANCE PLAN NAME OR PROGRAM NAME Insured Insurance Plan
d. INSURANCE PLAN NAME OR PROGRAM NAME Patient Insurance Plan	d. IS THERE ANOTHER HEALTH BENEFIT PLAN? <input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO If yes, return to and complete item 8 a-d.
10. IS PATIENT'S CONDITION RELATED TO: Local Use	13. INSURED'S OR AUTHORIZED PERSON'S SIGNATURE I authorize

READ BACK OF FORM BEFORE COMPLETING & SIGNING THIS FORM.

Select a link in the above 1500 Health Claim Form to see where in Helper the information comes from.

Box 2 - Patient's Name: Patient's Name is on the Patient Facesheet. To go there, select Facesheet | Patient Info. | First Name, MI, Last Name

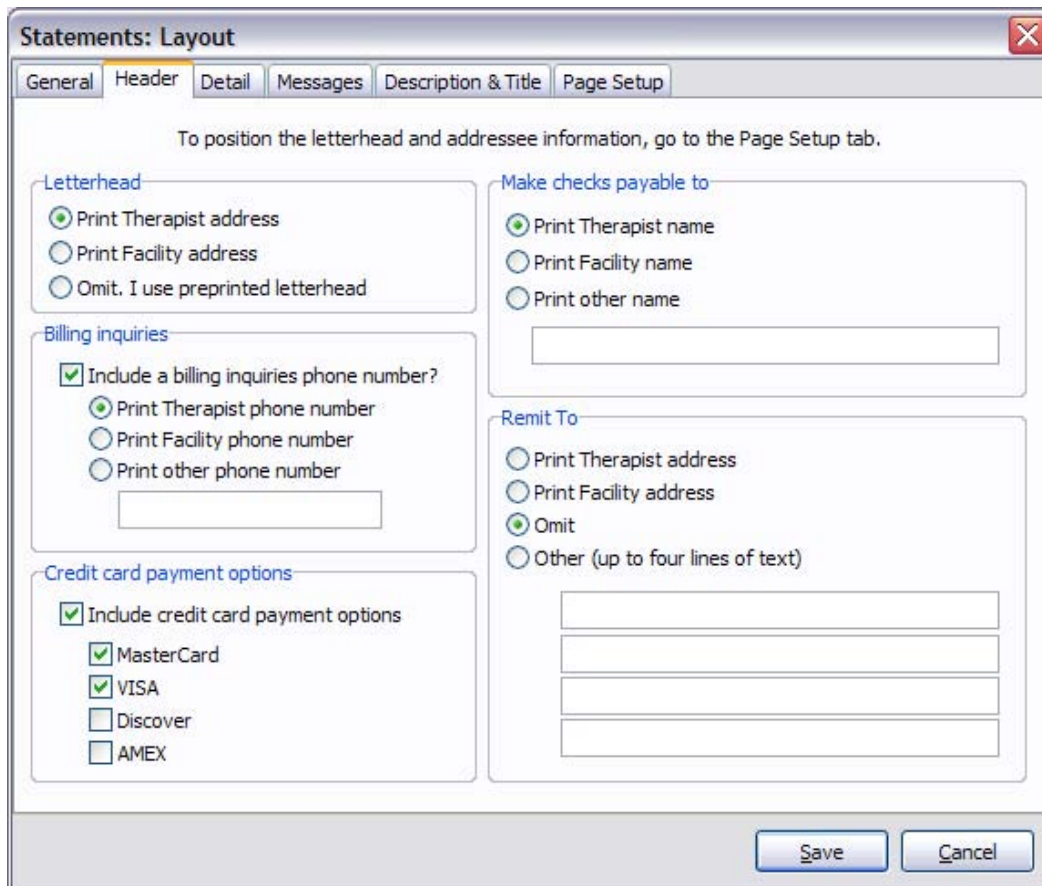
Close

Billing Enhancements

New Patient Statements

The patient bill in Helper has been completely re-designed. The statements printed from within Helper now look much more professional and offer additional features:

- There is a tear off section that can be mailed back with patient payment. It will fit in a #9 windows envelope and gives all information needed for the office to handle the payment.
- There are now credit card options on the tear off portion of the statement. The user can setup each provider with a list of credit card types they accept: MasterCard, Visa, Discover, or AMEX. The values stored in the Provider Library will be used to determine which options are printed on each statement. The billed person can then enter their credit card number, expiration date, sign it, and send it back.
- More options on what can be included on the bill such as patient Date of Birth and Social Security
- The new statement is a Payment Tracking bill which requires the correct use of Payment Tracking within Helper. This assures that the bills will always be accurate. Users have the option to use the previous style bill if they don't want to set up a new statement.



Statements: Layout

General | **Header** | Detail | Messages | Description & Title | Page Setup

To position the letterhead and addressee information, go to the Page Setup tab.

Letterhead

- Print Therapist address
- Print Facility address
- Omit. I use preprinted letterhead

Billing inquiries

- Include a billing inquiries phone number?
- Print Therapist phone number
- Print Facility phone number
- Print other phone number

Credit card payment options

- Include credit card payment options
 - MasterCard
 - VISA
 - Discover
 - AMEX

Make checks payable to

- Print Therapist name
- Print Facility name
- Print other name

Remit To

- Print Therapist address
- Print Facility address
- Omit
- Other (up to four lines of text)

Save Cancel

Statements: Layout

General | Header | **Detail** | Messages | Description & Title | Page Setup

Patient Information

- Date of Birth
- Social Security Number
- Primary Therapist
- Primary Therapist NPI
- Primary Therapist License #

Description Column

Select the information you would like to display for each transaction type.

Sessions

- Rendering Provider
- Place of Service
- Diagnosis
- Session Length
- Session Units

Payments

- Method of payment
- Check number

Adjustments

- Type of adjustment

Save Cancel

Statements: Layout

General | Header | Detail | Messages | Description & Title | **Page Setup**

The statement is designed to fit into a single or double windowed #9 envelope. Select the type of envelope you will use and the location of the windows.

I don't use a windowed envelope, use the default positions for addresses

I use an envelope with a single window

Window Position

Distance from the left inches

Distance from the bottom inches

I use an envelope with a double window

Top Window Position

Distance from the left inches

Distance from the bottom inches

Bottom Window Position

Distance from the left inches

Distance from the bottom inches

Save Cancel

Sample Statement:

John J Therapist
 2500 Commonwealth Ave
 Suite #2700
 Boston, MA 01234

For billing inquiries call (617)123-4567

David Jones
 27 Washington St
 Woburn, MA. 01801

STATEMENT

IF PAYING BY CREDIT CARD FILL OUT BELOW			
CARD TYPE		<input type="checkbox"/> MASTERCARD <input type="checkbox"/> VISA	
CARD NUMBER		SECURITY CODE	
CARDHOLDER NAME		EXP. DATE	
SIGNATURE		AMOUNT	
MAKE CHECKS PAYABLE TO			
John J Therapist			
STATEMENT DATE	ACCT NO	AMOUNT DUE	AMOUNT ENCLOSED
7/15/2009	CG	\$50.00	
REMIT TO			
John J Therapist 2500 Commonwealth Ave Suite #2700 Boston, MA 01234			

DATE	PROCEDURE CODE	DESCRIPTION	CHARGE	PATIENT AMOUNT	INSURANCE / OTHER AMOUNT																
Patient: David Jones																					
04/15/2009	90806	Individual Psychotherapy Diagnosis: 300 Length: 50	\$90.00	\$25.00	\$65.00																
07/15/2009		Payment by David Jones		(\$25.00)																	
05/15/2009	90806	Individual Psychotherapy Diagnosis: 300 Length: 50	\$90.00	\$25.00	\$65.00																
06/15/2009	90806	Individual Psychotherapy Diagnosis: 300 Length: 50	\$90.00	\$25.00	\$65.00																
<table border="1"> <tr> <th>CURRENT</th> <th>OVER 30 DAY S</th> <th>OVER 60 DAY S</th> <th>OVER 90 DAY S</th> <th>OVER 120 DAY S</th> <th>PLEASE PAY THIS AMOUNT →</th> <th>PATIENT</th> <th>INSURANCE / OTHER</th> </tr> <tr> <td>\$0.00</td> <td>\$25.00</td> <td>\$25.00</td> <td>\$0.00</td> <td>\$0.00</td> <td></td> <td>\$50.00</td> <td>\$195.00</td> </tr> </table>						CURRENT	OVER 30 DAY S	OVER 60 DAY S	OVER 90 DAY S	OVER 120 DAY S	PLEASE PAY THIS AMOUNT →	PATIENT	INSURANCE / OTHER	\$0.00	\$25.00	\$25.00	\$0.00	\$0.00		\$50.00	\$195.00
CURRENT	OVER 30 DAY S	OVER 60 DAY S	OVER 90 DAY S	OVER 120 DAY S	PLEASE PAY THIS AMOUNT →	PATIENT	INSURANCE / OTHER														
\$0.00	\$25.00	\$25.00	\$0.00	\$0.00		\$50.00	\$195.00														
Please remit payment within 30 days. Thank you!																					

Credit Card Processing Enhancements

Credit Card transactions now processed directly via USDC

In previous versions of Helper, all credit card transactions processed via Expedite! were handled via a modem in Helper Software's Massachusetts office. This could cause problems for customers during service outages due to the unreliability of dial-up modems. Credit card transactions are now sent directly from the client machine via the internet to US Data-Capture who processes the charge. This will make the credit card processing system much more reliable.

Ability to use a card swipe machine with Helper

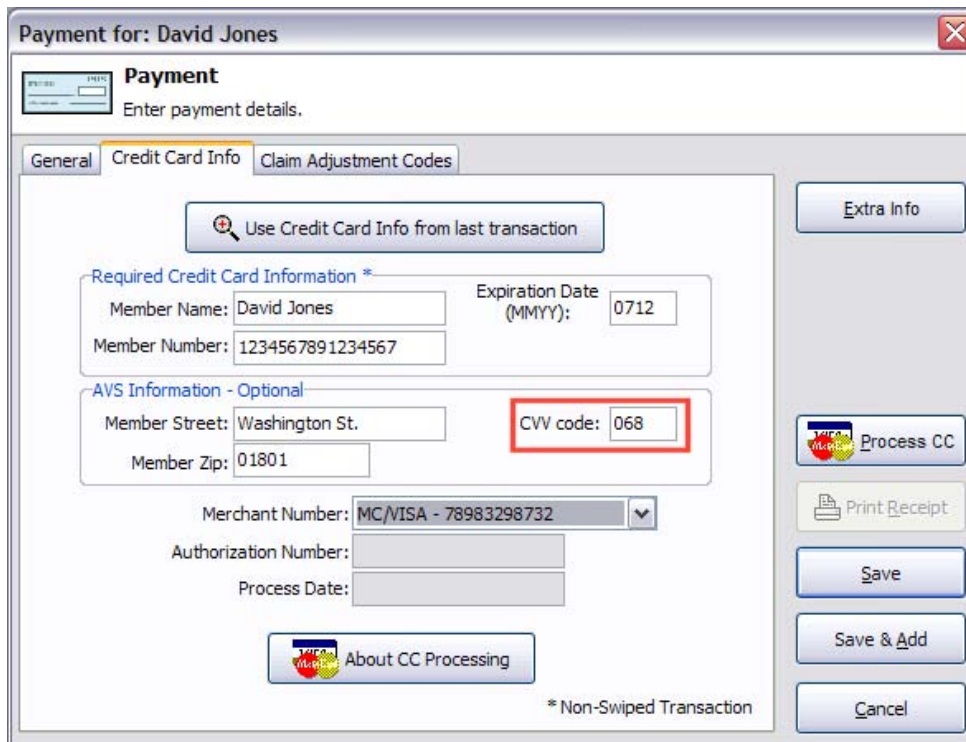
In older versions of Helper, the only way to process a credit card was to type the information manually into the payment screen. In v7.6, users will be able to use a card swipe machine attached to their computer which will fill in the credit card information automatically.

Enhanced Security for Patient financial info

Previous versions of Helper kept patient credit card numbers on file in the database. This does not meet new Payment Card Industry security standards. In v7.6, all previous customer credit card data will be converted to only show the last 4 digits of the card number and going forward, only the last 4 digits of the card will be saved once the card is processed.

Additional Enhanced Security with addition of CVV code support

Previous versions of Helper did not include support for the addition of the customer's CVV security code to the credit card payment. Helper 7.6 now includes this support on the payment screen.

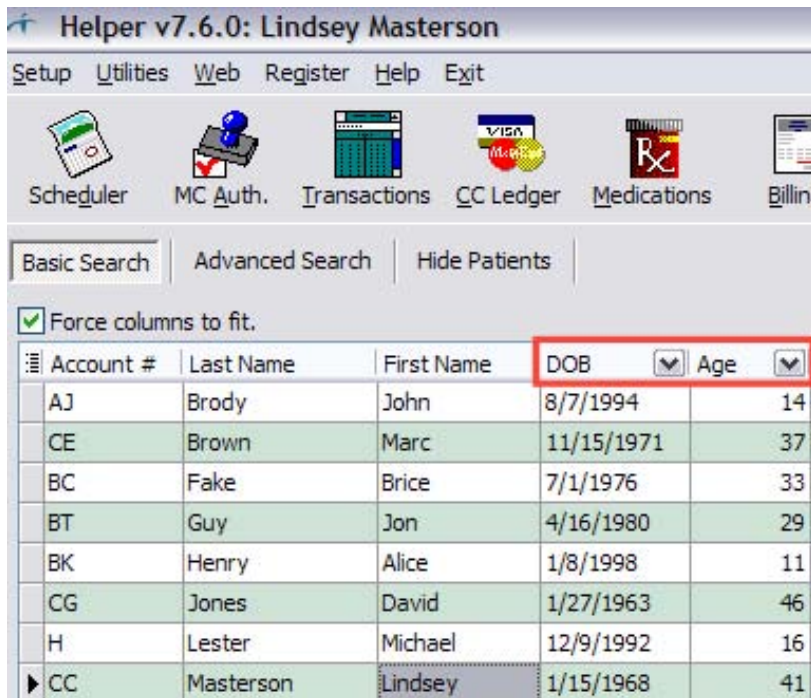


The screenshot shows a software window titled "Payment for: David Jones" with a close button in the top right corner. The window has a tabbed interface with three tabs: "General", "Credit Card Info", and "Claim Adjustment Codes". The "Credit Card Info" tab is active. At the top of the tab, there is a button labeled "Use Credit Card Info from last transaction". Below this, there are two sections: "Required Credit Card Information *" and "AVS Information - Optional". The "Required Credit Card Information" section contains fields for "Member Name" (David Jones), "Member Number" (1234567891234567), and "Expiration Date (MMYY):" (0712). The "AVS Information - Optional" section contains fields for "Member Street" (Washington St.), "Member Zip" (01801), and "CVV code:" (068). The CVV code field is highlighted with a red border. Below these sections, there is a "Merchant Number" dropdown menu (MC/VISA - 78983298732), an "Authorization Number" field, and a "Process Date" field. At the bottom left, there is a button labeled "About CC Processing" with a small logo. At the bottom right, there is a note: "* Non-Swiped Transaction". On the right side of the window, there are several buttons: "Extra Info", "Process CC" (with a logo), "Print Receipt", "Save", "Save & Add", and "Cancel".

Other Enhancements

Date of Birth field added to patient list

We have added the ability to view the patient birth date and age on the main patient list screen in both Basic and Advanced search.



Better handling of auto- distribution in Payment Tracking

Some improvements to the way Payment Tracking works in Helper have been implemented. On the top right of the Payment Tracking screen, a new “Remaining” field has been added. This is the Total to Apply minus the amounts that have already been applied. This way, the customer doesn’t have to do the math. In the example below, you can see that the total amount to apply was \$100, \$45 of which has been applied, with \$55 left to apply.

Payment Tracking

Payment From: Lindsey Masterson Date: 7/15/2009

Patient: Lindsey Masterson Total to Apply: \$100.00 \$55.00 Remaining

Date	Transaction	Amount Billed	Writeoff	Total Owed	Owed by this party	Amount to apply
3/10/2009	90806, Individual Psychot	\$90.00	\$0.00	\$90.00	\$45.00	\$45.00
3/18/2009	90806, Individual Psychot	\$90.00	\$0.00	\$90.00	\$45.00	\$0.00
6/15/2009	90806, Individual Psychot	\$90.00	\$0.00	\$90.00	\$45.00	\$0.00

\$270.00 \$0.00 \$270.00 \$135.00 \$45.00

Always automatically distribute Payment Tracking payments
This value can also be changed in Setup|Preferences

Clear applied amounts Distribute remaining amount

If the amount applied to the highlighted transaction does not equal the amount owed by this party then you can use one of the following buttons.

Charge the patient Charge secondary ins. Change the writeoff Manually adjust the transaction Claim Adjustment Codes

Save Cancel

We've also added two new buttons on the right-hand side of the screen. The "Clear Applied Amounts" button sets all the "Amounts to Apply" to zero and resets the "Remaining" dollar amount to be the same as "Total to Apply." The "Distribute Remaining Amount" button allows the user to have the program distribute the Remaining amount of the payment among any open sessions.

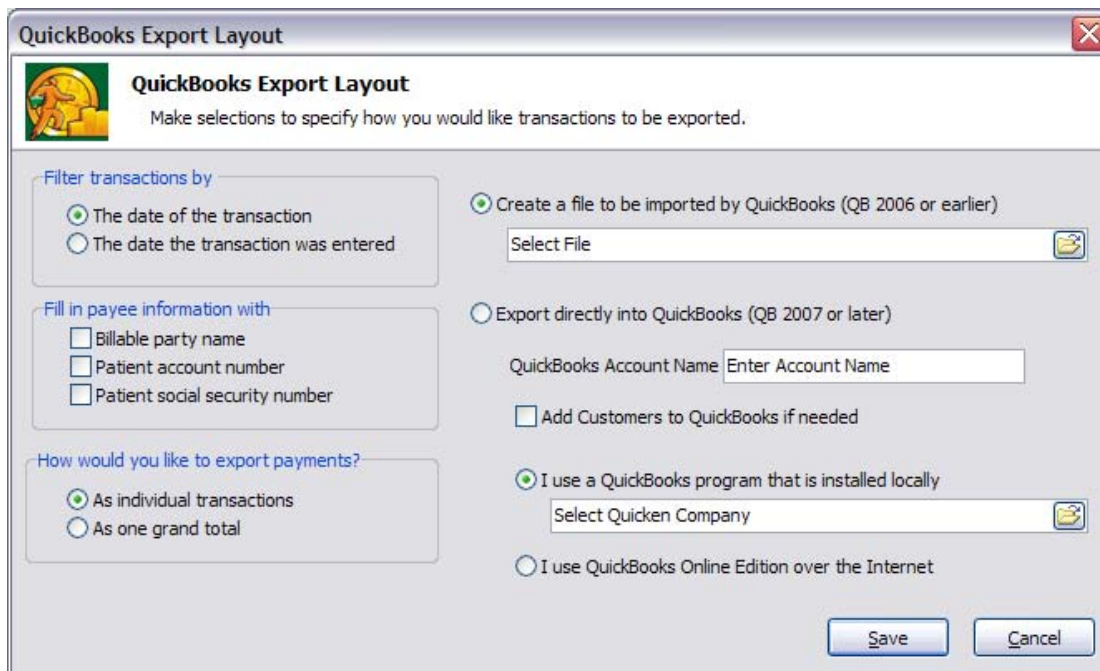
Finally, we've added a checkbox to the left-hand side of the screen which allows you to select whether or not you want Helper to automatically distribute your Payment Tracking payments in the future. If this box is checked, it will automatically distribute the payments in Helper for all patients. This setting can also be changed in Setup > Preferences.

InfoScriber support added for Windows Vista 64-bit and Windows Server 2008

In previous versions of Helper, InfoScriber was not compatible with Windows Vista 64-bit or Windows Server 2008 operating systems. It is now fully compatible with all Windows supported operating systems.

Direct Integration with QuickBooks

In previous versions, in order to share data between QuickBooks and Helper, you were required to export a .QIF file via a utility in Helper and then import it into QuickBooks. The newer versions of QuickBooks no longer support .QIF files. We now integrate directly with QuickBooks Desktop Edition as well as QuickBooks Online Edition rather than requiring the user to export to a file and then import into QuickBooks.



Bug Fixes

- Launching the ERA module on a large database was slow. This has been fixed.
- When searching for available openings in Scheduler, Scheduler would ignore any “all-day events” that had been entered and show those days with time available. This has been fixed.
- The report preview screen was always opening up maximized. It will now remember the user’s preference and open up to the size it was last.
- There were some speed issues with the loading of the Advanced Search page of the patient list. The speed of that page has been greatly improved.