Product Bulletin

Therapist Helper™ 6.4 Release Notes

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1-800-TRY-VMED

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Before You Upgrade

Before you upgrade to Therapist Helper v.6.4 from an earlier version of Therapist Helper, we recommend the following:

1. Run all of your outstanding bills and process all of your outstanding electronic insurance claims.
2. Run the Therapist Helper Data Integrity Check utility by going Start | All Programs | Therapist Helper | Data Integrity Check from your Windows desktop.
3. Back up your Therapist Helper database by selecting Utilities | Backup Data from the main menu.
4. The database transfer to Therapist Helper v.6.4 from previous versions can be time consuming (several hours on larger databases). When you schedule a time to run the upgrade, you should take this information into account.

HIPAA Security Features

Several product enhancements have been included into Therapist Helper v.6.4 to assist our users in meeting the new HIPAA Security Standards. (http://www.cms.hhs.gov/hipaa/hipaa2/regulations/security/) These enhancements include changes to User Login procedures, expanded user rights functionality, an audit trail, and improvements to data security.

User Login

Therapist Helper ODBC Driver: Therapist Helper distributes an ODBC driver that allows customers to use third-party software packages with Therapist Helper. As of TH v.6.4, the ODBC driver to requires a username / password login. Additionally, the username / password combination entered into the ODBC driver must have Administrator access.

Elimination of Blank Passwords: Therapist Helper 6.4 requires a password when a user is setup, regardless of if password protection is activated. Additionally, many user that upgrade from earlier versions to v.6.4 will have users with blank passwords. When a "blank password" user logs into Therapist Helper v.6.4 and password protection is activated, Therapist Helper will no longer accept a blank password and will force the user to enter a new password.

Strong Password Warning: If a user enters a password with six characters or less that is not a mix of characters and numbers, the user receives a warning suggesting that they enter a stronger password. Therapist Helper does not force users to enter a strong password.

User Rights

Therapist Helper v.6.4 contains significantly expanded user rights controls. The new user rights controls are accessed in the Multi-User Setup and allow the user to limit access to all modules within Therapist Helper and control add, edit, and delete functionality. The modules that user rights can be set for include Facesheets, Progress Notes, Transactions, Scheduler, MC Authorizations, Medications, Reports, Billing, and Libraries. In addition to controlling add, edit and delete functionality, the User Rights features now allow users to control some very specific functionality such as running reports and processing credit cards. The Access to Screens tab of the Multi-User setup has also been completely updated.

Audit Trail

Therapist Helper v.6.4 contains an audit trail that records specific events within Therapist Helper. In the events that the audit trail logs include:

- User logins.
- Failed user logins.
- Synchronization with plug-in software including Therapist Traveler, TheraScribe, and QuicDoc.

- Add, edit, and delete of electronic Protected Health Information.
- Printed reports.

Additionally, Therapist Helper contains an Audit Log management utility that allows users with Administrative rights to review, print, sort and archive the Audit Log. The Audit Log Utility can be accessed by selecting View Audit Log from the Utilities menu.

Data Security

Therapist Helper v.6.4 contains several enhancements that will significantly protect the Therapist Helper database from unauthorized access. These enhancements include:

- Encrypt Therapist Helper User table which stores usernames and passwords.
- Secure the Therapist Helper ODBC Driver (see User Login).
- Require a database signature to access Therapist Helper DBISAM tables. This feature is not "visible" to the end-user, but will eliminate the potential to use freely accessible database management tools to access the Therapist Helper software.
- Remove the Therapist Helper shared data folder for networking configuration, eliminating the need to share the Therapist Helper data folder across a network.

Transaction Ledger

Therapist Helper v.6.4 adds two new tabs to the Transaction Ledger, an Open Credits tab and a Batch Payments tab.

Open Credits Ledger

The Open Credits tab shows all payments that have not been fully applied to a charge in Therapist Helper. In addition, the Open Credits tab allows the user to perform a mass update to open payments and apply them to open charges.

Batch Payments Ledger

The Batch Payment Ledger introduces the *Batch Payment* as a new Transaction Type to Therapist Helper. The Batch Payment Ledger shows all Batch Payments that have been entered into Therapist Helper and allows user to add new Batch Payments. The Batch Payment Ledger is designed to assist users entering EOBs into Therapist Helper where a single check from an insurance company is used to generate multiple payments within Therapist Helper.

Copy Facesheet

Therapist Helper v.6.4 adds a new **Save & Copy** button to the facesheet. Users that are familiar with the functionality of the current **Save & Add** button should intuitively know how to use this feature. When the user clicks the **Save & Copy** button, the current facesheet will be saved and closed, a new facesheet will be opened, and most of the information from the first facesheet will be copied into the new facehsheet. The information that is not copied into the new facesheet is the information that uniquely identifies the client such as name and SSN.

Word Mail Merge and Excel Export

Elimination of the shared folder (see *Data Security* above) will cause user to loose any Word Mail Merge or Excel Export templates that they have saved in Therapist Helper prior to v.6.4. The Word Mail Merge and Excel Export feature has been moved to the Reports section of Therapist Helper and the layouts for these exports must be recreated in v.6.4. Users will not have to recreate the "Main" documents used in the Word Mail Merge, however they must locate these files on their computers as they are stored outside of Therapist Helper.

Medicare HCFA

The HCFA Bill Layout now has a new option for Medicare: **Populate Box 11 with NONE if the Primary is Medicare (Box 1 Medicare is checked)**.

1. If the option for Medicare is not selected in the HCFA Layout then the HCFA will print the same as for any other insurance company.
2. When Box 1 is not checked, Box 11 is populated the same as other insurance companies.
3. When the **Populate Box 11 with NONE…** option is selected, Box 11 will print different if Box 1 Medicare is checked. When Box 1 is checked:

Medicare is Primary

- Box 11 prints the word **NONE**.
- Box 11a through Box 11d is left blank.
- Medicare only wants Box 9 to be populated when the other insurance is MediGap. Because of this, if Medicare is the Primary and MediGap is NOT the secondary then leave Secondary blank or else it will incorrectly populate Box 9.

Medicare is Secondary

- Box 11 through Box 11c prints as normal.
- Box 11d will not be populated.
- Medicare wants the primary insurance in Box 11, not the Medicare information. In the Facesheet, populate the Box 11 fields for Medicare with the primary insurance information.
- Medicare only wants Box 9 to be populated when the other insurance is MediGap. Because of this, if Medicare is secondary and MediGap is not the primary, leave Primary blank or Box 9 will be incorrectly populated.

Resolved Issues

Libraries

- If the **Data** field is left blank when the user tries to add an Urgency of Intake library entry, Therapist Helper produces the following error: "LIBUOIDATA not found in the message table!" The correct message is now displayed: "Data can not be blank."

Scheduler

- In the Scheduler **|** Openings **|**Find Patient screen, the user was able to customize the **Basic** patient list but not the **Advanced** patient list. Both lists are now customizable.
- In Scheduler, when the screen is reduced in size, there is a scroll bar on the right that allows users to move up and down through the day. If the scroll bar was pulled down to see the end of the day and then the screen was maximized, only get the latter half of the day was shown. This has been corrected.

Billing

- In the Billing Ledger, if the user forcibly moves a charge from **Ready to Send** to **Sent** or **Closed**, the billing method should be "None" since the charge was never included on any bill or claim. It currently shows it as "Printed HCFA" or "Printed Bill". This has been corrected.

- The standard Bill reports have two colons after the **Bill To** and **Bill For** movable fields. The extra colon is in the report definition itself and is in the database. The extra colon was removed from the default Bill reports. Current users will need to manually remove the extra colon and the extra colon will not appear in new layouts or new installations.
- The message displayed when submitting to SecureConnect and errors are found that need to be fixed was confusing. It said that claims were exported. This is actually correct but we changed it to say that they were exported to SecureConnect for validation. These claims will not appear in SCC and must be resent from TH.
- The Bill and Electronic Statement selection criteria for **Patient's who owe** and **Billing Parties who owe** did not use Payment Tracking information. This could cause some zero balance bills and statements to be printed and some non-zero balance bills and statements to be filtered out. Payment Tracking information is now used in the bills and statements as needed.
- In the Billing Ledger, when a user either used **Add charge to 'Ready to Send'** or **Move a Batch of Charges** to move sessions to Ready to Send, the **Bill/Claim #** and **Last Batch** numbers were improperly carried over. They should be cleared and show as *NA* on the Ready to Send tab. This has been corrected and the transfer program will clear existing values that are on the *Ready to Send* tab.
- In the Billing Ledger, **View History**, if an insurance session on the Ready to Send tab had a billing method of "Facesheet Billing Method" then it would be displayed as "Printed HCFA" instead of the value in the Facesheet.
- On the Billing Ledger, the **Orig Sent Date** and **Last Sent Date** columns did not fill in properly on the Ready to Send tab. The results did not take into consideration any entries on the other tabs. This has been corrected.
- The performance of Move a Batch of Charges wizard was improved.
- The method for generating the **Bill/Claim #** has changed. This was done to remove the possibility of duplicate claim Ids being used when submitting to SecureConnect.

General

- When Therapist Helper was opened and the client could not connect to the database (regardless of networked or non-networked setup), part of the message was "Press OK to exit Therapist Helper and launch the Data Setup utility." The wording has been changed to "Press OK to exit Therapist Helper and the Data Setup Utility will launch."
- If a report was running and the progress bar was visible, pressing Alt+X to close Therapist Helper, would cause Therapist Helper to continue to run in the background. The only way to finally close Helper in this situation was to use End Task in the Task Manager. Therapist Helper now closes correctly.
- If startup of Therapist Helper was cancelled during the login phase or a wrong password was entered three time, the patient list would flash on the screen before Helper closed. This has been corrected and the patient list is not displayed.

Reporting

- Overall Summary: If Aging was turned on and the user grouped by **Insurance**, **Clinic**, or **Referral Source** the report would produce incorrect results. This has been corrected.
- Overall Summary - Payment Tracking Summary: If **Only show charges not completely paid for** was selected, it was possible for some transactions to be missing on the report. If two or more transactions for the same patient were next to each other then only the first one would be displayed. This has been corrected

- When viewing Payment Tracking for a credit the user has the option to; **Charge the patient** and **Writeoff this amount**. Neither of these was correctly updating existing invoice information. Because of this, the user could go to the Payment Tracking screen from the Transaction Ledger, change an applied amount to something smaller than it currently was, use one of the two buttons to change the amount owed, and then cancel the Payment Tracking screen. This would leave the original amount applied intact resulting in the amount applied being greater than the amount owed. Payment Tracking will now correctly change the amount applied even if you cancel out of the Payment Tracking screen.
- Layouts - It was possible to enter a report page size of 11" wide by 8.5" high and also click the "Portrait" radio button. With this fix, this is still possible but after saving and then editing again, the **Page Orientation** will be set to "Portrait" if the width is equal to or less than the height, regardless of what was saved with the report initially.
- Overall Summary - The column headers on the report did not repeat at the top of each page. This has been corrected.
- Phone Book - The report has a filter for **Birthday** on the main screen. The date format for that filter incorrectly contained a year. The format of the field is now mm/dd. A filter using 3/1 and 3/31 will return all patients with birthdays in the month of March.

Facesheet

- Archiving the Primary insurance company and making the Secondary the Primary resulted in the phone numbers and emails disappearing. This has been corrected.
- The Who Will Be Billed page of the Facesheet now accepts up to two decimal points for a percentage field. This allows user to allocate specific dollar amounts using a percentage. For example: Resp. #1 is charged $50 for a $95 appointment and Resp. #2 is charged $45. Entering 52.63% for Responsible Party 1 will correctly allocate the charge.
- The tab order on the Patient Facesheet | Insurance page was incorrect. This has been corrected.
- If the **Patient Name** was empty on the Facesheet, it was displayed as ", - Patient" on the Who will be Billed, Print Dates, and Adjustment Defaults tabs. It will now show "NA".
- If a Facesheet was edited that did not have a Responsible Party, a Responsible Party was entered, then the user switched to the Facesheet | Billing | Adjustment Defaults page and selected the new Responsible Party, the selection on the Adjustment Defaults page was not saved correctly. This has been corrected.
- Grouping only by **Age** in the Patient List, Advanced Search would cause an Access Violation. The same Access Violation would occur when the list was grouped by another column, then by Age, and then right click the grid and select **Restore to Default View**. This has been corrected.

Transactions

- The colors used on the Payment Tracking screen used when entering a payment has been changed from green, blue, and black to gray and black.
- The Payment Tracking screen used to apply a payment (or credit) to a charge shows a list of all charges, including positive adjustments. If the user highlighted a positive adjustment and clicked "Manually adjust the transaction", they were able to change the adjustment from a positive (charge) to a negative (credit). When transaction was saved, and the user was returned to the Payment Tracking screen, the **Amount Billed** column would show the new negative amount for the adjustment but the **Amount owed by this party** column was not updated correctly. The user was able to apply part of the payment to that adjustment even though the adjustment was no longer a charge but was now a credit. With the change introduced in this version, the adjustment will stay on the list but the **Amount**

owed by this party will be changed to zero and the user will not be allowed to apply any money toward it.

- When in the Payment Tracking screen and automatic distribution of payments is being used, the wrong session could be opened when one of the buttons at the bottom of the screen (such as **Manually Adjust the Session**) was clicked. This has been corrected.
- When entering or editing a session, increasing the writeoff to a value greater than the service charge would result in negative amounts owed by some billable parties. Additionally, if a writeoff was entered that was less than the service charge but greater than the amount the patient owes and the user select to recalculate the amount owed by all parties, the writeoff would be deducted from the patient and the patient would have a negative amount owed. Negative amounts owed are not allowed in sessions. Service charge will now be increased, if needed, in order to avoid negative amounts owed.

Medications

- If the user attempted to export on the Medication Ledger prior to changing tabs to **Lab**, the error "Export DataSet Cannot be Blank" was generated. This has been corrected.