



Helper Release Notes

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9.8 – December 2021 (SOW-54)

SOW-54

1. Patient Nickname
2. Disable new sessions for inactive patients
3. Exclude inactive responsible parties from reports
4. ERA Options
5. Save prompt in Progress Notes
6. Lock Ledgers
7. Add Payment Defaults to the Patient Facesheet
8. Add Insurance ID to the Therapist Billing Entity Type override screen
9. Add Preference to start in Basic Search or Advanced Search
10. Add dates to the Archived Insurance screen
11. Enable shift+click in Move a Batch of Charges
12. Transfer Program Update and Testing

9.7 –April 2021 (SOW-53)

SOW-53

1. Add LiveAssist link to the Help Menu
2. One-digit Modifier warning
3. No NPI Entered warning on Provider or Referring Physician Libraries
4. 837 Fixes for Non-specific procedures
5. Correct inclusion of archived insurance on Patient List report lists patients for each insurance company
6. Option to disable ability to use last swiped credit card
7. Update Facesheet phone number order to Mobile first
8. Include Therapist Pay adjustment when calculated amount paid to provider
9. Add ability to flag patient by color
10. API connectivity to SecureConnect

9.6.3 – November 2020 (SOW-49)

SOW-49

1. Allowed Amount updated handling for ERA
2. POS of 02 for Telehealth
3. Option to output Patient Account Number on Box 26
4. Add CPT Modifier to newer statements and older bills
5. Active/Inactive filter on Patient Lists
6. Update Patient List with Reminder Information
7. Add new print columns for Patient List
8. Rename Phone Book for to List For

9.6.2 – April 2020 (SOW-44, SOW-45, SOW-46)

SOW-44

1. NCHIE / Insurance true up

SOW-45

2. ICD-10 for 2020

SOW-46

3. Remove Patient Account Number on Box 26 due to ERAs
4. Fix Name Correction in ERA so updates proper billable party
5. CLP payment distribution logic
6. Include Multi-user scenarios when determining which providers schedule to copy
7. Disable F1 Help
8. Remove Web-Check for Updates

9.6/9.6.1 – August 2019 (SOW-43)

SOW-43

1. Text appointment reminders

9.5.4 – September 2018 (SOW-40)

SOW-40

1. Remove ICD-9 subtext
2. ICD-10 for 2019

9.5/9.5.1/9.5.2 – April 2018 (SOW-34, SOW-35, SOW-36)

SOW-34

1. Integrate with CardConnect's CardPointe Gateway API

SOW-35

2. CardConnect Hosted iFrame Tokenizer

SOW-36

3. Swipe functionality for Credit Cards
4. Save token to reuse credit card without storing it in Helper

9.4.5 – January 2018 (SOW-32, SOW-33)

SOW-32

1. Set ERA Default to Write Off and use Priorities
2. Include missing session information when ERA is without Provider Information so it can be more easily corrected

SOW-33

3. Updates to the Helper Code Update Utility

9.4.4 – October 2017 (SOW-29, SOW-30)

SOW-29

1. 2018 ICD-10 Codes
2. EOB Print field additions
3. Batch Payments update
4. ERA Provider Matching logic changes

SOW-30

5. Therascribe ICD-10 Integration

9.4.3 – August 2017 (SOW-25)

SOW-25

1. Update Error logic for Appointment Reminders and Calendar Sync
2. Remove errant email addresses from disrupting entire reminder cycle
3. Fix memory leak issue with Appointment Reminders

9.4 – May 2017 (SOW-21, SOW-22)

SOW-21

1. Wrong Database warning for backup process
2. Facesheet Flagged Reminders
3. Custom message on Appointment Reminders
4. Combine Facesheet Warnings
5. Add more Facesheet Validations
6. SBR-03 and 04 export for a secondary claim

SOW-22

7. Account for CAS codes in ERA

9.3.2 – March 2017 (SOW-20)

SOW-20

1. Export ICD-10 codes to OrderConnect

9.3 – December 2016 (SOW-18)

SOW-18

1. 2016 Taxonomy Codes, 2017 ICD-10 Codes
2. Allow Diagnosis in Encounter Screen to be saved
3. Include Electronic Claims Submissions in the Audit Log
4. Duplicate Date Warning for different billing party eliminated
5. Add ability to Archive Responsible Parties
6. Various updates to 837 value handling (2430 AMT, Medicaid Payer IDs, CLM05-3 Claims)

9.2 – September 2016 (SOW-14)

SOW-14

1. Remove ability to store credit card numbers

9.1 – May 2016 (SOW-11, SOW-12)

SOW-11

1. Email Appointment Reminders
2. Updates to Graphics and Text on “Help-Additional Products and Services”
3. Option to Deselect All Favorite in Diagnosis Library
4. Fix no taxonomy when changing provider
 - a. Patient Statement Landscape printing issue
 - b. Encounter Save validates ICD-9 but not ICD-10

SOW-12

1. Sync Helper Schedule to cloud-based calendars