

## Medisoft v17 Model Evolution Matrix

	Basic	Advanced	Net Pro
<b>Electronic Health Record (EHR) Integration</b>			
Basic Patient Demographic and Appointment Feed from Practice Management System to EHR			√
Electronic Encounter Form Feed of Transactions to Practice Management System			√
Customizable HL7 Interfaces with EHR			√
Enhanced One-way Clinical Data Flow From Practice Management System to EHR via Updated A04 and A08 Patient Message			√
-- Phone Number			√
-- Cell Phone			√
-- E-mail Address			√
-- New Insurance Carriers			√
-- New Referring Physicians			√
Appointment Status Updates Sent via Bi-directional Data Exchange			√
New Communication Manager Controls			√
-- Determine if Appointment Status Updates have been Transmitted and Received			√
-- Send Enhanced Library Resources to Medisoft Clinical, Including Provider, Facility, Procedures and Diagnosis Updates			√
New DVD Install Includes Medisoft v16 Client Server and Medisoft Clinical on One DVD (greatly reduces the number of screens that require user intervention)			√
<b>Insurance</b>			
Automatic Rebill for Claims	√	√	√
Aging View in Transaction Entry	√	√	√
UB-04 Paper and Print Image	√	√	√
Custom Dates on ERA Posting	√	√	√
Remittance Tracking for Secondary Claims		√	√
Revenue Management (integrated electronic claims solution that improves claim, eligibility and remittance processing)	√	√	√
Customizable and Flexible Grid Entries for Insurance Carriers, Providers, Your Practice and Your Data Requirements (improves claim generation)	√	√	√
Eligibility Data Entry and Processing Logic (gives greater control and the ability to manage payor IDs)	√	√	√
Ability to Define When the System Checks for Eligibility Updates (enhanced system performance)	√	√	√
Enhanced Search Filters in Payor ID Lookup Window (includes ability to add, edit and delete a record)	√	√	√

## Medisoft v17 Model Evolution Matrix -- Page 2

	Basic	Advanced	Net Pro
<b>Insurance Continued</b>			
Changes Made to Comply with the ANSI X12 Version 5010 Standards for the Transmission of Specific Healthcare Transactions (see -- New Windows or Tabs: EDI Note Tab on Edit Claim Window; EDI Notes List Window; EDI Note Window -- Several Fields Moved and Windows Restructured to Accommodate Moved Fields -- Several New Fields Added Throughout Medisoft -- Option for UB-04 Condition Codes Moved to Main Lists Menu -- Several Additional Options Added and Other Changes Made	√ √ √ √ √ √	√ √ √ √ √ √	√ √ √ √ √ √
Revenue Management electronic remittance advice (ERA) processing updates to comply with ANSI-5010 -- Updates to the RelayHealth Implementation Guide (IG) -- New Remittance Delivery Method (RDM) Elements Added to Loop 1000B -- New Coverage Expiration Date (DTM) element added to explain that coverage was denied because the patient's coverage has expired -- New Claim Received Date Elements (DTM) added in Loop 2100 so that they are recognized if they are received -- Updates Made to the Claim Preview Report and Claim Details Report	√ √ √ √ √ √	√ √ √ √ √ √	√ √ √ √ √ √
Revenue Management Enhancements (to reduce the number of clicks to perform certain tasks, and simplify the setup and configuration)	√	√	√
Insurance Groupings for Reporting and Analysis		√	√
Security Assignments Same for Insurance and Eligibility (streamlines eligibility security and access)		√	√

<b>Accounting/Billing</b>			
Customized Aging Buckets	√	√	√
Withhold Code Type for Procedure Codes	√	√	√
Automatic Rebill for Claims	√	√	√
Deactivate Codes	√	√	√
Global Days (surgical billing)	√	√	√
Billing for 8 Diagnosis Codes	√	√	√
Integrated Electronic Eligibility Checking	√	√	√
Multi-link Treatment Plans		√	√
Serialized Superbills		√	√
Color-coding Transactions and Quick Ledger		√	√
Dunning Messages for Statements		√	√
Statement Management		√	√
Cycle Billing		√	√
Rules-based Collection Assignments		√	√
Actionable Collection Worklist		√	√
Task or Date-driven Collection Workflow		√	√
On-demand Collection Letters		√	√
Automatic Recalculation of Patient Remainder Balance		√	√
Automatic Small Balance Write-offs		√	√
Missed Copay Tracking		√	√
Unprocessed Transactions (Holding Tank)		√	√

## Medisoft v17 Model Evolution Matrix -- Page 3

	Basic	Advanced	Net Pro
<b>Accounting/Billing Continued</b>			
Missed Copay Remainder Statement		√	√
Small Balance Write-off by Statement Submission Count		√	√
Statement Manager Remainder Balance Display		√	√
Collection List Link to Quick Ledger		√	√
Deposit List Detail Print		√	√
Integration with BillFlash from NexTrust (automates the printing and mailing of patient statements)		√	√
<b>Reporting</b>			
Export to Microsoft® Excel	√	√	√
Case Billing Code Filter on Standard Reports	√	√	√
File Maintenance Progress Reporting	√	√	√
Print Blank Superbills	√	√	√
Electronic Transaction Reporting (helps manage electronic transactions related to verifying insurance eligibility and submitting claims)	√	√	√
Audit Reports (tracks reporting and exporting of data)	√	√	√
Facility Report		√	√
Quick Receipt and Quick Statement		√	√
Patient Collections Reports		√	√
Insurance Collections Reports		√	√
Unapplied Copayment Report		√	√
Standard Patient by Insurance Report		√	√
Standard Patient by Diagnosis Report		√	√
Standard Patient by Procedure Report		√	√
Dashboard - Totals		√	√
Dashboard - Trending		√	√
Medisoft Reports (formerly Focus Reports Standard) - Includes reports previously available in Medisoft plus more than 200 additional reports		√	√
<b>Security/HIPAA</b>			
Security Added to MediUtils	√	√	√
Auto Log-off	√	√	√
Warning on Unapproved Codes	√	√	√
Unique Identifier Fields	√	√	√
ANSI Standard Electronic Claims	√	√	√
HIPAA Security Ready	√	√	√
Rules-based Password Management	√	√	√
User Access History Reporting	√	√	√
Multi-level Trigger Management	√	√	√
5 Levels of Permissions and Security		√	√
Print Permissions Grid		√	√
Security Permissions on Reports		√	√
Global Security		√	√
Integrated Reporting Security		√	√

## Medisoft v17 Model Evolution Matrix -- Page 4

	Basic	Advanced	Net Pro
<b>Usability</b>			
Customizable Tool Bar	√	√	√
Option to Display Subtotals	√	√	√
Warning on Duplicate Patient	√	√	√
Auto Tax Entry	√	√	√
Streamlined Transaction Entry	√	√	√
Field Data Checking	√	√	√
Show Remainder When Applying Payments	√	√	√
Apply to Oldest When Applying Payments	√	√	√
Select Multiple Claims to Print or Reprint	√	√	√
Enter Payments Directly from Office Hours Professional	√	√	√
Audit Generator with Chart Number Filtering	√	√	√
Multi-practice Conversion	√	√	√
Scheduled File Maintenance	√	√	√
Updated User Interface	√	√	√
Customizable Tool Bar in Office Hours	√	√	√
Set Default Data Fields		√	√
Customized Data Screens		√	√
One-click to Change Responsibility for Transactions		√	√
Patient Flagging		√	√
Streamlined Quick Ledger View		√	√
Rules-based Worklist for Daily Office Tasks		√	√
Patient Quick Entry		√	√
Dashboard - Warnings		√	√
Last Selected Chart Number Hot-key		√	√
Default Printer Option for Custom Reports		√	√
Transaction Entry Sortable Grids		√	√
Customizable Transaction Sort on Patient Statements		√	√
Edit/Enter Patient Notes from Quick Ledger		√	√
Claim Management Sorting Save		√	√
Dashboard - Logged-in Users Utility			√
DVD Install (Clinical)			√
<b>Special Features</b>			
Online Updates	√	√	√
Integrates with Microsoft Excel	√	√	√
Data Export/Import	√	√	√
HL7 Interface	√	√	√
Office Hours Professional Included with Product (registration occurs at the same time that Medisoft is registered)	√	√	√
Integrated Dashboard		√	√
Workflow Administrator		√	√
Standard Integrated Word Processor		√	√
Standard Chart Number Change Utility		√	√
Office Messenger			√
Multimedia File Storage			√
Patient Archiving			√

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