

# Medisoft Features Evolution Matrix

| Insurance   | v14 | v15 | v16 | v17 |
|---|-----|-----|-----|-----|
| Automatic Rebill for Claims   | ✓   | ✓   | ✓   | ✓   |
| Insurance Groupings for Reporting and Analysis  | ✓   | ✓   | ✓   | ✓   |
| Remittance Tracking for Secondary Claims  | ✓   | ✓   | ✓   | ✓   |
| Integrated Electronic Eligibility Checking  | ✓   | ✓   | ✓   | ✓   |
| Aging View in Transaction Entry   | ✓   | ✓   | ✓   | ✓   |
| UB-04 Paper and Print Image   | ✓   | ✓   | ✓   | ✓   |
| Custom Dates on ERA Posting   | ✓   | ✓   | ✓   | ✓   |
| 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)   |     |     | ✓   | ✓   |
| Security Assignments Same for Insurance and Eligibility (streamlines eligibility security and access)   |     |     | ✓   | ✓   |
| Changes Made to Comply with the ANSI X12 Version 5010 Standards for the Transmission of Specific Healthcare Transactions (see Release Notes for Complete Details) |     |     |     | ✓   |
| – 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                                 |     |     |     | ✓   |



| Insurance (Continued)   | v14 | v15 | v16 | v17 |
|---|-----|-----|-----|-----|
| – 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 process) |     |     |     | ✓   |

| Accounting/Billing  | v14 | v15 | v16 | v17 |
|---|-----|-----|-----|-----|
| Customized Aging Buckets  | ✓   | ✓   | ✓   | ✓   |
| Withhold Code Type for Procedure Codes  | ✓   | ✓   | ✓   | ✓   |
| Customizable HL7 Interfaces with EHR  | ✓   | ✓   | ✓   | ✓   |
| Serialized Superbills   | ✓   | ✓   | ✓   | ✓   |
| Multi-link Treatment Plans  | ✓   | ✓   | ✓   | ✓   |
| Deactivate Codes  | ✓   | ✓   | ✓   | ✓   |
| 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)   | ✓   | ✓   | ✓   | ✓   |
| Global Days (surgical billing)  | ✓   | ✓   | ✓   | ✓   |
| Billing for 8 Diagnosis Codes   | ✓   | ✓   | ✓   | ✓   |
| 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) |     |     |     | ✓   |



| Electronic Health Record (EHR) Integration  | v14 | v15 | v16 | v17 |
|---|-----|-----|-----|-----|
| Basic Patient Demographic and Appointment Feed From Practice Management to EHR  |     | ✓   | ✓   | ✓   |
| Electronic Encounter Form Feed of Transactions to Practice Management System  |     | ✓   | ✓   | ✓   |
| Customizable HL7 Interfaces with EHR  |     | ✓   | ✓   | ✓   |
| Enhanced One-way Data Flow From Practice Management 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 v17 Client Server and Medisoft Clinical on One DVD (greatly reduces the number of screens that require user intervention) |     |     | ✓   | ✓   |

| Reporting  | v14 | v15 | v16 | v17 |
|--|-----|-----|-----|-----|
| Facility Report  | ✓   | ✓   | ✓   | ✓   |
| Quick Receipt and Quick Statement  | ✓   | ✓   | ✓   | ✓   |
| Patient Collections Reports  | ✓   | ✓   | ✓   | ✓   |
| Insurance Collections Reports  | ✓   | ✓   | ✓   | ✓   |
| Unapplied Copayment Report   | ✓   | ✓   | ✓   | ✓   |
| View and Print All Future Appointments for Patients  | ✓   | ✓   | ✓   | ✓   |
| Export to Microsoft® Excel   | ✓   | ✓   | ✓   | ✓   |
| Standard Patient by Insurance Report   | ✓   | ✓   | ✓   | ✓   |
| Standard Patient by Diagnosis Report   | ✓   | ✓   | ✓   | ✓   |
| Standard Patient by Procedure Report   | ✓   | ✓   | ✓   | ✓   |
| Case Billing Code Filter on Standard Reports   | ✓   | ✓   | ✓   | ✓   |
| Dashboard – Totals   | ✓   | ✓   | ✓   | ✓   |
| Dashboard – Trending   | ✓   | ✓   | ✓   | ✓   |
| Medisoft Reports (formerly Focus Reports Standard) – Includes reports previously available in Medisoft plus more than 200 additional reports |     | ✓   | ✓   | ✓   |
| File Maintenance Progress Reporting  |     | ✓   | ✓   | ✓   |



| Reporting (Continued)  | v14 | v15 | v16 | v17 |
|--|-----|-----|-----|-----|
| Blank Appointment Indicator  |     | ✓   | ✓   | ✓   |
| 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)   |     |     |     | ✓   |

| Security/HIPAA                       | v14 | v15 | v16 | v17 |
|--------------------------------------|-----|-----|-----|-----|
| 5 Levels of Permissions and Security | ✓   | ✓   | ✓   | ✓   |
| Print Permissions Grid               | ✓   | ✓   | ✓   | ✓   |
| Auto Log-off                         | ✓   | ✓   | ✓   | ✓   |
| Warning on Unapproved Codes          | ✓   | ✓   | ✓   | ✓   |
| Unique Identifier Fields             | ✓   | ✓   | ✓   | ✓   |
| Security Permissions on Reports      | ✓   | ✓   | ✓   | ✓   |
| ANSI Standard Electronic Claims      | ✓   | ✓   | ✓   | ✓   |
| HIPAA Security Ready                 | ✓   | ✓   | ✓   | ✓   |
| Rules-based Password Management      | ✓   | ✓   | ✓   | ✓   |
| User Access History Reporting        | ✓   | ✓   | ✓   | ✓   |
| Multi-level Trigger Management       | ✓   | ✓   | ✓   | ✓   |
| Global Security                      | ✓   | ✓   | ✓   | ✓   |
| Security Added to MediUtils          | ✓   | ✓   | ✓   | ✓   |
| Integrated Reporting Security        |     |     | ✓   | ✓   |

| Usability                                  | v14 | v15 | v16 | v17 |
|--|-----|-----|-----|-----|
| Set Default Data Fields                    | ✓   | ✓   | ✓   | ✓   |
| Customizable Tool Bar                      | ✓   | ✓   | ✓   | ✓   |
| Option to Display Subtotals                | ✓   | ✓   | ✓   | ✓   |
| Customized Data Screens                    | ✓   | ✓   | ✓   | ✓   |
| Warning on Duplicate Patient               | ✓   | ✓   | ✓   | ✓   |
| Auto Tab Entry                             | ✓   | ✓   | ✓   | ✓   |
| Streamlined Transaction Entry              | ✓   | ✓   | ✓   | ✓   |
| Field Data Checking                        | ✓   | ✓   | ✓   | ✓   |
| Patient Flagging                           | ✓   | ✓   | ✓   | ✓   |
| Show Remainder When Applying Payments      | ✓   | ✓   | ✓   | ✓   |
| Apply to Oldest When Applying Payments     | ✓   | ✓   | ✓   | ✓   |
| Select Multiple Claims to Print or Reprint | ✓   | ✓   | ✓   | ✓   |



| Usability (Continued)  | v14 | v15 | v16 | v17 |
|--|-----|-----|-----|-----|
| Enter Payments Directly from Office Hours Professional   | ✓   | ✓   | ✓   | ✓   |
| One-click to Change Responsibility for Transactions  | ✓   | ✓   | ✓   | ✓   |
| Streamlined Quick Ledger View  | ✓   | ✓   | ✓   | ✓   |
| Rules-based Worklist for Daily Office Tasks  | ✓   | ✓   | ✓   | ✓   |
| Copy, Edit, Add New Case Directly from Office Hours Professional   | ✓   | ✓   | ✓   | ✓   |
| Reschedule Status in Office Hours Professional   | ✓   | ✓   | ✓   | ✓   |
| Audit Generator with Chart Number Filtering  | ✓   | ✓   | ✓   | ✓   |
| Patient Quick Entry  | ✓   | ✓   | ✓   | ✓   |
| Multi-practice Conversion  | ✓   | ✓   | ✓   | ✓   |
| Scheduled File Maintenance   | ✓   | ✓   | ✓   | ✓   |
| Dashboard – Warnings   | ✓   | ✓   | ✓   | ✓   |
| Dashboard – Logged-in Users Utility  | ✓   | ✓   | ✓   | ✓   |
| 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  |     | ✓   | ✓   | ✓   |
| Updated User Interface Implements New Colors, Icons, Window Controls, etc., Introduced with Microsoft® Office 11 (enhances the user experience and improve navigation) |     |     | ✓   | ✓   |
| DVD Install (reduces installation time)  |     |     | ✓   | ✓   |
| Customizable Tool Bar in Office Hours  |     |     | ✓   | ✓   |

| Special Features                     | v14 | v15 | v16 | v17 |
|--------------------------------------|-----|-----|-----|-----|
| Office Messenger                     | ✓   | ✓   | ✓   | ✓   |
| Multimedia File Storage              | ✓   | ✓   | ✓   | ✓   |
| Online Updates                       | ✓   | ✓   | ✓   | ✓   |
| Encoder Pro                          | ✓   | ✓   | ✓   | ✓   |
| Integrates with Microsoft Excel      | ✓   | ✓   | ✓   | ✓   |
| Interfaces with Lab Systems          | ✓   | ✓   | ✓   | ✓   |
| Patient Archiving                    | ✓   | ✓   | ✓   | ✓   |
| Workflow Administrator               | ✓   | ✓   | ✓   | ✓   |
| Data Collaboration                   | ✓   | ✓   | ✓   | ✓   |
| Standard Integrated Word Processor   | ✓   | ✓   | ✓   | ✓   |
| Standard Chart Number Change Utility | ✓   | ✓   | ✓   | ✓   |
| HL7 Interface                        | ✓   | ✓   | ✓   | ✓   |



| Special Features (Continued)  | v14 | v15 | v16 | v17 |
|---|-----|-----|-----|-----|
| Integrated Dashboard  | ✓   | ✓   | ✓   | ✓   |
| Data Export/Import  | ✓   | ✓   | ✓   | ✓   |
| Future Appointment Warning  |     | ✓   | ✓   | ✓   |
| Phone Number Fields in Appointment Entry  |     | ✓   | ✓   | ✓   |
| Office Hours Professional Now Included with Product (registration occurs at the same time that Mwedisoft is registered) |     |     |     | ✓   |

**medisoft®**

**McKESSON**

