3.10 Release Notes
Welcome

These release notes explain our latest features in NueMD® and Nuesoft Xpress™. These notes supplement our latest guru guides. Stay informed by reading the Billboard on the left side of your Home screen.

Get the most from these notes

Take advantage of this flexible PDF format. It’s hyper-link rich for easy online reading and print friendly too.

Find answers faster

You’re one click away from jumping to any topic. Click any item from the fully linked table of contents on the right or select your choice from the bookmarks pane on the left.

Print-friendly

Neatly organize your notes. Print everything including the convenient cover page and contents table and build a handy notebook for easy reference or training new hires.

Easy Reading

Better graphics with simple language makes for easier reading. Plus, this friendly format uses space more efficiently so our notes require fewer pages.

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We made template building easier in NueMD® EMR. Templates are a group of related questions. For example, a set of questions about smoking history can be created and saved to a “Smoking” template. Also, multiple templates can be grouped into an Encounter Type so you can use them for specific appointments. Two new Practice setup sections let you build these templates and encounters:

- **Template builder**: Create and modify encounter templates and questions.
- **Encounter Type builder**: Group templates into different encounter types.

**NOTE**
The new template model offers lots of options. To learn more, see our new EMR Guru Guide.

### 1.1 The template model

Use a bank of ready-made questions to build custom templates or modify their language to fit your specific needs. Also, you can assign rules to link questions to other Templates, Conditions, or Questions. Triggering a rule pulls the relevant question or template into the encounter.

**Assigning rules**

Click Rule to open the Rule Type Selector. Then choose the target Type. You can assign multiple Rules to both Questions and Answer Types. Simply click Rule each time you want to add one.

**System templates**

NueMD® also comes pre-loaded with system templates. These automatically record things like allergies, medications, conditions, diagnosis, and procedures into encounters, tickets, and the ECM. Even add custom items to these templates right in the encounter. Also, you can record dictation in the attachment template.

**NOTE**
New diagnosis and procedure codes must be created in Practice Setup, as they're tied to ICD-9 and CPT codes.

### Printing prescription orders

Use the Medication template to see patient medication history and even print new prescriptions in a clean and professional form.

### 1.2 Starting encounters

EMR Appts is the launching pad where users begin EMR functions. From here, see scheduled appointments and encounter statuses, open patient encounters and even update check-in statuses.

#### Check-in status

<table>
<thead>
<tr>
<th>Appt Time</th>
<th>Provider</th>
<th>Page</th>
<th>Patient Name</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>Patrick McMan</td>
<td></td>
</tr>
<tr>
<td>8:15 AM</td>
<td>Dr Dunn</td>
<td>1</td>
<td></td>
<td>Est P</td>
</tr>
<tr>
<td>5:00 AM</td>
<td>Dr Dunn</td>
<td>1</td>
<td>Roberta Johnson</td>
<td>Est P</td>
</tr>
<tr>
<td>7:30 AM</td>
<td>Dr Dunn</td>
<td>1</td>
<td>Tracey Benedict</td>
<td>Est P</td>
</tr>
</tbody>
</table>
The text color of appointments shows check-in status:

- **Black**: Confirmed (or no status)
- **Red**: Arrived
- **Pink**: Ready
- **Blue**: Admitted
- **Green**: Discharged

To update patient statuses in the grid, simply right-click an appointment, then select a new one from the list. Changing check-in statuses here auto-updates them in Appts.

**Encounter status**

Encounter Statuses show what stage the patient encounter is in:

- **No icon**: The encounter has not started
- ****: The encounter is in progress
- ****: The encounter is locked.
- ****: A ticket was created from the encounter.

**1.3 Patient EMR**

The Pt. EMR is the workbench where you see and add data to patient appointments. This info is later used to build tickets, letting you treat and bill patients in one streamlined workflow. Pt. EMR has 7 tabs:

- **Patient Summary**: Group and see procedures, labs, medications or x-rays.
- **Proc/Diag History**: See procedure and diagnosis/encounter history.

**Tip**

Once you enter Pt EMR, the icon in the main toolbar changes to EMR Appt, letting you quickly get back to EMR Appts when needed.

**Search box**

Use the search box to quickly find patients without having to schedule appointments or open encounters in EMR Appt.

1. Search by:
   - Last name
   - SSN or Chart Number
   - Patient or Other Party Number
   - Birth date in mm/dd/yyyy format

2. Press **ENTER** to begin search.

3. If several entries match, select the target patient from the drop down list.

**Note**

When you select a patient, EMR displays their SSN, Chart Number, age, phone numbers, and email address at the top of the page.

**1.4 EMR walkthrough**

With so many new features, we can’t cover them all here. This overview shows the basic workflow of the EMR. Learn more in the EMR Guru Guide.

Remember, templates and encounter types are just two highlights of many new EMR features. Group similar questions in templates, then later link those to encounter types to use them for specific appointments.
**STEP 1: Set up templates**

In Practice Setup ▶ Template Builder, add custom or pre-loaded questions to templates:
- Check to see if templates are in your system before adding new ones. This prevents duplicates. Simply type the template name in the search box above. If none match, click <Add a new template> to start a new one.
- Create questions in the Question Builder tab. Use Rules to link them to other conditions, questions or templates.
- The template canvas in the left frame lets you add/remove questions and change their order. Deleting questions from templates won’t erase them from your question library.

**Step 2: Set up encounter type**

After building templates, go to Practice Setup ▶ Encounter Type Builder to group related ones into encounter types:
- Click New in the taskbar to start an encounter type.
- The Add a Template frame on the right lets you add/remove custom and pre-loaded templates and change their order.
- The side tabs show the included templates.

**TIP**

Improve your workflow and save time: Adding the condition and diagnosis templates to encounter types lets you instantly generate tickets from patient data.

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**STEP 3: Start an encounter**

The EMR Appts screen lets you see which encounters are in progress or waiting to begin. Set the top filters and click Refresh. Appointments matching your filter settings appear in the tables below. Right-click appointments to update check-in status or double-click them to open the Pt. EMR and start encounters.

**What if there’s no appointment?**

The Clinical Notes tab in Pt. EMR lets you use templates to enter info in patient records without starting encounters. Just click New, then choose the target template. This is useful, for example, when patients call for prescription refills.

**STEP 4: Document the encounter**

- In the Attachments tab, review medical records and other relevant documents before seeing patients
- In the Encounters tab, either click New to open an encounter type or Add a template.
- Use the medication template to print prescription forms.
- If needed, use system templates like conditions, diagnoses and procedures to create tickets from patient data.
- If you’re not ready to create tickets, Lock encounters to prevent changes.
- Use the Audit Log to track all encounter changes.
Managing your paperless office just got easier. The latest version of Electronic Chart Management combines all your document tasks in one screen. Scan medical charts and ID cards, even organize them along with other attachment types.

**Current ECM users**
If you're already using ECM, your existing folders and files are rolled into the new version. ID Cards and Appointment attachments go to new folders with the same name, while EMR attachments go to the Encounter Attachments folder. ID Cards without names are changed to the following:
- PrimaryIns(Front)
- PrimaryIns(Back)
- SecondaryIns(Front)
- SecondaryIns(Back)
- PhotoID
- BusinessCard

**Can I Still Use Attachments and ID Cards?**
Yes, while the ECM now includes functions previously found only in Attachments and ID Cards, those features are still available and accessed under the **View** menu. Adding files in those places automatically updates your folders in ECM.

**Call Client Services**
To subscribe, contact Nuesoft Client Services at **800.401.7422** opt 4.

### 2.1 Getting started
If you're new to using the ECM, setup takes just two easy steps:

**Grant permissions in System Admin**

First, visit System Administration to extend ECM permissions to allowed staff.
1. Go To **Home ➤ Practice Setup ➤ System Administration ➤ Groups Tab**.
2. Choose the **Group Code** from the list. For example, you may want to extend permissions to a group called Admin.
3. Under **Locations**, choose your target from the list.
4. Under **Modules**, choose ECM from the list.
5. Under **Functions**, mark all boxes.
6. Click **Save** when done. It may take a moment for permissions to apply.

**Create ECM folders in List Maintenance**
Next, create ECM Folders to organize patient charts and other files so you can quickly find them later. These five default folders cannot be deleted or renamed:
- Labs
- ID Cards
- Encounter Attachments
- Appointment Attachments
- Unassigned
Consider adding new folders for things like EKGs, Medications and Notes. In the ECM, organize folders further by adding groups, which are like subfolders.

**To create ECM Groups:**
1. Go To **Home ➤ Practice Setup ➤ List Maintenance**.
2. Click the **List Type** drop down menu and choose **ECM Folders** from the list.
3. Click **New** in the taskbar.
4. Enter a **Folder Name** and **Description**.
5. Click **Save** when done.

**Tip**
Folders added in list maintenance are account-wide, but can have patient-specific groups. Deleting a folder in ECM will not remove it from **List Maintenance** until you login again.
To access ECM, go to Patient, select a patient, then click View in the toolbar and choose ECM.

Once opened, use the search box to switch patients and view files without returning to Patient.

Right-click in ECM

ECM now has a right-click menu for easy access to features like group, rename, delete and more. Just right-click a folder to see your options.

Folders and groups

The ECM Folders you create in List Maintenance let you organize all patient files. To classify documents further, consider adding groups. These patient-specific subfolders are useful for separating related info by date, results, or priority. Simply right-click a folder, then choose Group from the list.

Thumbnail pane

Select a folder to see thumbnail previews of the documents inside. Once you find the right one, just double-click to open it in the viewer or relevant application. 2.4

2.3 Scan and attach files

Scan or Attach files to the ECM to keep patient info safe, secure and organized.

Scanning Patient Documents
1. Go To Home►Patient►choose a patient►click View►select ECM
2. Select the target folder or group.
3. Scan documents face down in your scanner.
4. Click Save when done.

NOTE
To scan I.D. cards, an Ambir PS667 Simplex A6 ID model scanner is required.

Attaching patient files

Attach patient files the same way you add attachments to emails. From the ECM,
1. Pick the target folder or group.
2. Click Attach in the taskbar, then find and select the file on your computer.
3. Click Save when done.
4. Enter a description for the file, then click OK.
**Moving files**

If you save files to the wrong folder or later create a new group, simply drag and drop them into place:

1. Press and hold the left mouse button to select a file.
2. Drag it to another folder or group, then release the button to drop it.
3. Click **Save** when done.

**2.4 Different file types**

Once attached, use the ECM to view patient files. While you can store and work with several file types, here are a few points to remember:

- **Images:** Scanned documents and medical images are usually **JPEGs** or **GIFs**. Preview these images in the thumbnail pane or download and print them from your computer desktop.

- **PDFs:** You can open and print PDFs from ECM without downloading them. A preview of the first page displays in the thumbnail pane letting you scroll through files quickly to find the right one.

- **Other types:** Files like Word documents (.doc) or Excel spreadsheets (.xls) do not show previews in the thumbnail pane. Either download these to your computer or double-click to open them in the right application.
3 Reports

New tools in Reports now make your job easier and give you more control over the reports you use.

3.1 Report management

Remember, the report scheduling feature judges the best time to pull data to maximize connection speed and minimize traffic impact.

Scheduled reports held in the queue

Scheduled reports run behind the scenes so you’re free to do other things in NueMD®. Once ready, they appear in the report queue, which is both a history of reports you’ve pulled and a waiting list of those you want to see. Now new options like Run Now and Remove help you manage reports in the queue.

Run Now

Use Run Now to bypass the schedule and run a report live. This option is only active if they are marked as Running or Retrying. Keep in mind, running heavy and complex reports live may slow NueMD® and keep you from doing other tasks while it’s generating.

Remove

Stay organized and uncluttered. Use Remove to delete old reports from the queue when you finish using them. This option is only active if they’re marked as Available or Error.

3.2 New reports

We now release new reports when they’re ready. All reports released since 3.09 are listed below. Give these a go and explore their features:

3.2.1 Appointment wait time report

When to use this?

Run this report daily to gauge practice efficiency and track how long patients wait to be admitted and treated by providers.

What does it show?

This report shows wait times based on check-in status time stamps in Appts. For each patient, you see how much time passed between being marked as arrived-ready and ready-admitted. Those times are totaled in the last column.
### Filters
- Appt. Date
- Appt Reason
- Location Code
- Provider Code

#### 3.2.2 Payer Mix Report

**When to use this?**

Run this report monthly to see which payers are contributing more to your insurance revenue. Payer comparisons are based on the number of patients covered, total charges and payment amounts.

**What does it show?**

View this report in detail or as a summary:

#### Summary

For each payer, the report tallies:
- Number of patients covered
- Total charges billed
- Total payments received
- Percentage of charges paid
- Percentage of total Insurance revenue

#### Detail

The detailed version further tallies totals by payer stage (i.e. primary, secondary and tertiary).

**Group by**

- **Billing Provider**: Entered in the Patient & Billing Info (top-left) frame of Ticket.
- **Location**: Entered in the Ticket Info (top-center) frame of Ticket.

**Filters**

- Ticket Date Entered: Daily, Weekly, Monthly, Quarterly and Yearly
- Ticket DOS: Daily, Weekly, Monthly, Quarterly and Yearly
- Billing Provider
- Insurance Code
- Insurance Group
- Location Code
- Payer Category
- Rendering Provider
- Transaction Code
- Transaction Group

#### 3.2.3 Copay Discrepancy Report

If you use the copay feature in Appts, you likely use the copay report each day to verify payment. Now use the discrepancy report type to quickly find differences in amounts due to those collected.

**Settings**

To edit patient copay requirements, go to Home > Patient > Insurance and find the patient name or number. Mark or unmark the Copay Required box and edit the amount.
When to use it?

Run this report daily to find missing copay amounts per patient appointment.

What does it show?

For every appointment requiring a copayment scheduled within the chosen date range, the report shows:

- Patient number
- Patient name
- Billing Provider
- Appointment date and time
- Copay amount due
- Date and time copay received
- Copay amount received
- Discrepancy (Δ) in amounts due vs. collected.

All amounts and discrepancies are subtotaled for each date, then totaled together.

Filters

- Appt Date [date of appointment]
- Appt Provider
- Copay Date [date the copay was received]
- Location Code
- Patient
Super Tools just got easier. New tools like Super System Administration, Claims and Statements improve your workflow and let you work multiple sub accounts on a single screen. Save time and money with these handy features:

### 4.1 Super system administration

Now get started faster. Super System Administration decreases the time it takes to extend user permissions to sub accounts.

**What’s different?**

Once you add users and permissions, the Sub Account Access tab lets you quickly pick which sub accounts users can access. It’s as easy as point, click and save.

**To grant account access**

1. Go to **Home** ▶️ **Practice Setup** ▶️ **System Admin** ▶️ **Sub Account Access** tab.
2. Under the **Select Users** frame, choose a **User**.
3. Under the **Grant Account Access** frame, mark the boxes next to the target sub accounts.
4. Click **Save** when done.

### 4.2 Super claims

Super Claims lets you skip the toggling and get straight to business. Now it’s easy to pull data from sub accounts and file claims faster from one screen.

**What’s different?**

An account selector now replaces the **Batch No., Patient, Insurance Group, Location** and **Provider** filters, letting you pick the sub accounts you want to work.

**To process claims**

1. Set the **filters** as needed, then click **Account** and mark the box next to those you want included in search results.
2. Click **Refresh** in the main toolbar—tickets matching your filter settings appear in the grid and a completion report shows if any accounts were excluded 4.4.
3. **Edit** or **Scrub** tickets with errors or warnings.
4. **Print** or **Transmit** claims when ready.
4.3 Super statements

As with claims, Super Statements lets you pull data in from sub accounts and process statements faster from one screen.

**What’s different?**

An account selector now replaces the Patient, Provider and Resp Party filters, letting you pick the sub accounts you want to work.

The Account Code column was also added to the Statements Grid to identify the accounts.

**To process statements**

1. Set the filters as needed, then click the Account and mark the box next to those you want included in search results.
2. Click Refresh in the main toolbar—statements matching your filter settings appear in the grid and a completion report shows if any accounts were excluded.
3. Edit statements with errors or warnings.
4. Print or Transmit statements when ready.

4.4 Completion Report

Since there’s no limit to how many sub accounts a Super Account can have, some users process tons of claims and statements in a day. That’s why each time you Refresh the Claims or Statements Grid, the system runs a completion report to show:

- How many accounts ran successfully, and
- Which accounts were excluded from the grid because of errors.

If any were excluded, no worries. Simply Print a copy of the report for your records, work on those in your grid, then return to other accounts later.

**Note**

Pulling too many heavily loaded accounts at once clogs processes and keeps some accounts from running.
5 Anesthesia Billing

NueMD® now lets you link charge-type transactions to anesthesia procedures for billing. When posted in **Ticket**, a calculator instantly determines how many units were used in the procedures based on the base, time and additional units you enter.

### 5.1 Transaction setup

Before you can post anesthesia procedures in **Tickets**, you must first add them as charge-type transactions in **Practice Setup** > **Transaction Codes**. Be sure to set their type of service to code 7-Anesthesia and enter the base units to show how difficult the procedures are regardless of how long they take.

### 5.2 Post transactions to tickets

When posting to tickets, use the **Transaction Details** frame to enter relevant info about the procedure. Simply click the **Arrow** to get to **Anesthesia Details**, and enter the procedure time in minutes, add any additional units too. The Unit Calculator totals these with the base units entered in **Practice Setup**. The total is then multiplied by the per unit charge to get the total charge amount. For example, the charge amount for a $100.00 anesthesia procedure multiplied by 6 units is $600.
6 Other 3.10 updates sorted by module

**GENERAL**
- Hibernation message now displays the word “minutes” after the integer value
- The Loading text that displays next to the bandwidth bar on login has been removed

**IMMUNIZATION**
*(for Nuesoft Xpress™ clients only)*
- Address Line 1 and 2 in Immunization letters appear on the same line

**REPORTS**
- Fixed Payer misspelling on Insurance Company List report
- Receivables reports will now print in ascending Ticket # order
- The footer on all reports has been changed to: Copyright © 1999-present Nuesoft Technologies, Inc. | www.nuesoft.com
- PDF option has been removed from Preview>right click menu
- Removed the “Please Wait…” dialog when setting a report to run in the background
- Removed the eClaims Payer Conversion report
- Renamed the Available status in the Report Queue to “Complete”
- Fixed Employer misspelling on Responsible Party List report
- "Account Number" has been renamed "Patient Number" on the Patient Ledger report.
- All Reports can now be displayed as a grid and exported to CSV.
- Fixed bug where Appointment Wait Time report pulls in missing data if no appointments exist for the date range.
- Added print margins to the Authorization Appointment Exceeded report. This report will now print in landscape.

**SUPER ACCOUNTS**
- The Account Selector now displays 2 columns. The first column displays the Account Code; the second column displays the Account Name. The columns are sorted in ascending alphabetic order by Account Code.

- New Report / New Message notification has been extended to stay visible from 7 seconds to 14 seconds
- Collections Report will no longer show negative balances (credits)
- Week end Report now includes tertiary details
- The Standard Copay Discrepancy report is now the Paid Copay Discrepancy report.