eMDs

Medisoft Mobile 3.2

Release Notes

December 2019

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Product

Medisoft®

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Table of contents

Chapter 1 - Enhancements 1
Installation and configuration 2
Patient Card 2
Case 6
Appointments 7
Charges. 12
Patients 12
Templates 16

Chapter 1 - Enhancements

This chapter presents installation and configuration of a high-level description of the following enhancements to the Medisoft® Mobile 3.2 application, as well as a high-level description of the enhancements for 3.2

Supported devices

This feature is for Medisoft 22 and newer.

Android

The following Android devices are supported:

- Android Tablet with Display dimensions of 9.5 inches or greater
- minimum of 1280 x 800 resolution

The following operating systems are supported:

7.x and newer

Apple

iPad

The Patient Intake feature is supported on iPad's with display dimensions of 9.5 inches or greater. Android Tablet's with Display dimensions of 10 inches or greater.

- iOS 12 and newer

iPhone

- iOS12 and newer

Firewall Considerations

For mobile 3.x apps, the Medisoft server and the mobile devices must be able to connect outbound to mslconnect.emds.com (23.99.212.20) on TCP port 443 (HTTPS). No inbound connections are made to the Medisoft server.

You can test connectivity by entering the following URL in a web browser running on your server: https://mslconnect.emds.com/connectiontest

If you see a message "You have successfully connected to MSLConnect," then your server meets the connectivity requirements for the mobile app.

Other Considerations

- You may wish to turn OFF auto-correct spelling if it is on your device. This will prevent unwanted changes as names and other words are entered.

- You may wish to turn OFF Smart Punctuation if it is on your device. This will prevent periods and other punctuation from automatically being applied to data entry.
- You may also wish to turn ON "Guided Access" in the iPad settings to keep the iPad in a single app. You can then triple-click the Home button to lock-in the app you wish to use so patients cannot roam around your device.
- You should require a password to operate your iPad or iPhone and turn-on "Find my iPad" or "Find my iPhone".
- Medisoft Mobile does not support split screen.

Installation and configuration

The mobile service for 3.2 requires .NET 4.5.2 or newer. If it is not already installed on your server, it will be installed with 3.2.

1. Start Medisoft or on your desktop and open your practice.
2. Set up users and user security for each user.
3. On the Tools menu, select Services > Mobile Interface Configuration. The Mobile Configuration screen appears.
4. Click the **Enable** button.
5. Take note of the values for API Key and API Code.
6. With your mobile device, launch the Google Play or App Store.
7. Search for Medisoft.
8. Download and install the application.
9. On the mobile device desktop, tap the mobile application. The application starts.
10. Enter the API Key and API Code that you noted.
11. Tap Save. The application will connect to your practice data.
12. Log in to your practice using your User ID and Password.

If you do not have a mobile PIN entered in Medisoft core, you will be prompted to enter a mobile PIN.

Patient Card

Note: Screen captures may appear differently depending on your mobile device (iPad, iPhone, or Android. Screen captures in this document show either iPad or iPhone.

Updated Name display

The patient's middle initial is now visible on the patient card.

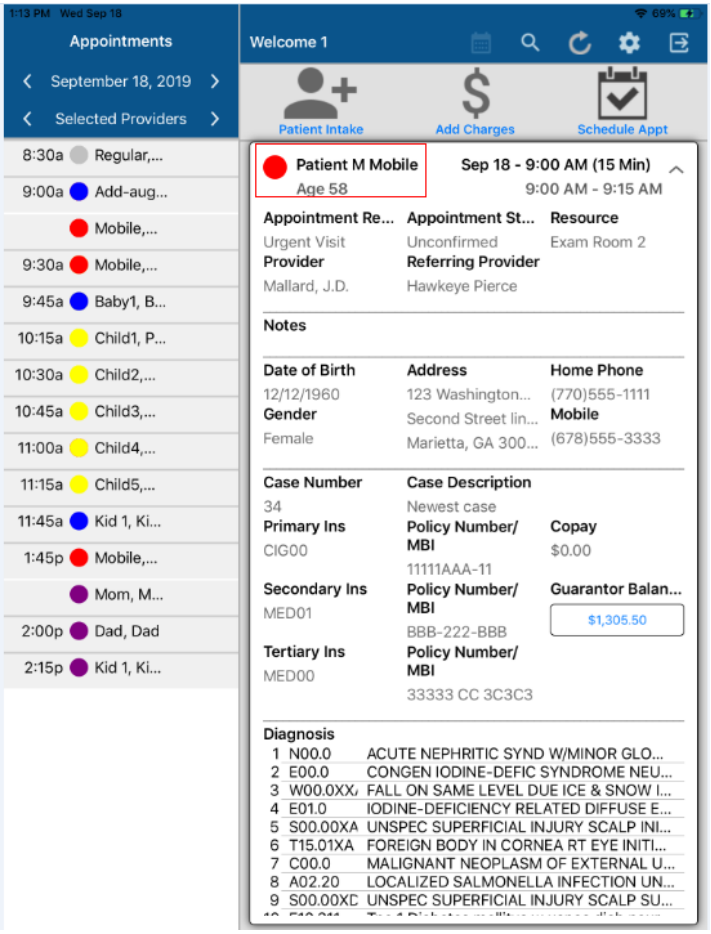


Figure 1. Patient card screen

In addition, the patient's middle initial appears on the following screens:

- Charges
- Patient search results
- New Appointment

Case Number/Description

In addition, the case Number and Description now appears on the patient card.

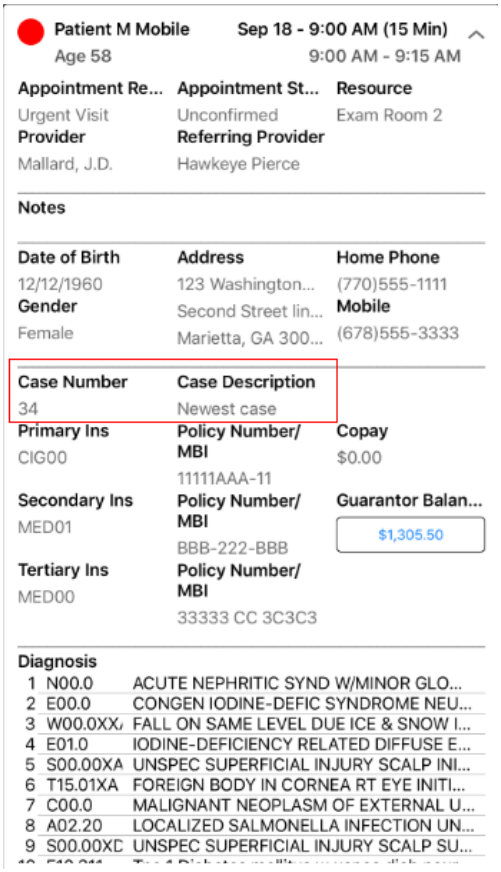


Figure 2. Patient Card

Which case us used

- If the patient is on the appointment list and the appointment has a case, the information from that case appears
- If there is an appointment but no case was selected, no case information appears, since a case could have been selected and it was chosen not to.
- If there is no appointment (lookup and select the patient) and the patient does have one or more cases, information from the case based on the Program Option setting appears

New information

The Secondary insurance, Tertiary Insurance, Policy Number, and Diagnosis Codes (from the case) now appear on the patient card.In addition, you can see diagnosis codes from the case and the patient's balance.

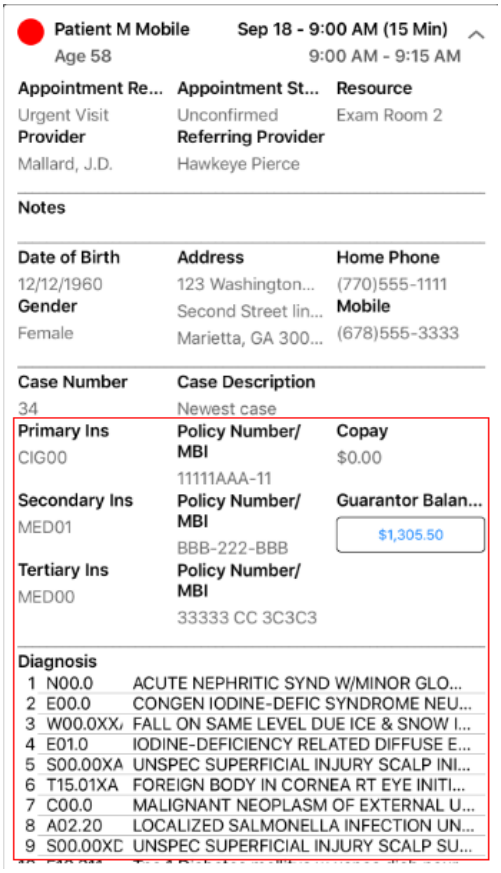


Figure 3. Patient Card

When you tap the balance on the screen, you can see a quick balance.

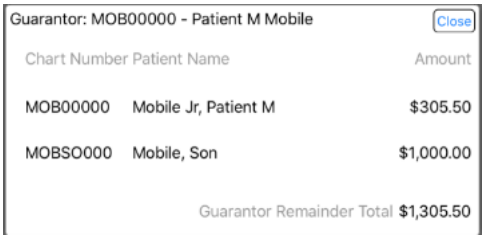


Figure 4. Quick Balance

If a patient has one guarantor for all cases, the Guarantor balance will display the Total remainder balance for all cases with that guarantor (as in F11 Guarantor Remainder total), when displaying the patient card for 1) the patient, and 2) the guarantor (if the guarantor is a patient).

If a patient has more than one guarantor on different cases: Medisoft uses the Case Default Program Option to determine the Guarantor Balance shown. Medisoft looks to the Program Option and finds the case that meets the Program Option, and then finds the Guarantor on that case AND

any other cases with that same guarantor, and finally totals the remainder balance for all the cases with that Guaranator.

Case

You can now select a case when creating an appointment in Medisoft Mobile.

This feature is available only in Medisoft Mobile 3.2 and newer. Users on earlier versions will see the field but be unable to select a case.

Updated Appointment screen

New field

There is a new Case field on the Appointment screen. Use this to select a case for the patient's appointment. The default value is the newest case.

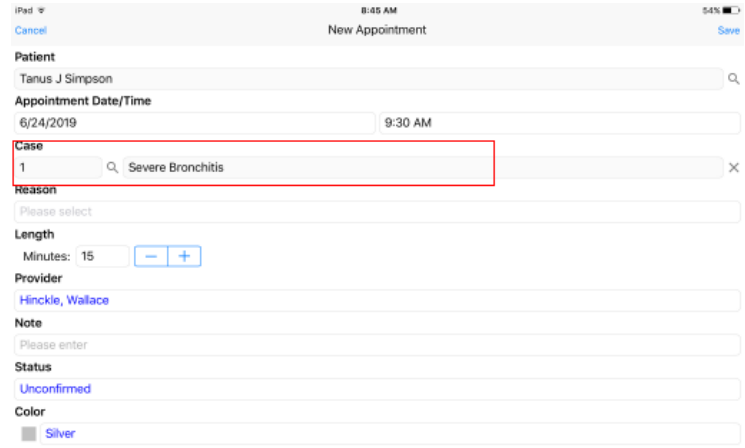


Figure 5. Appointment screen

You can select a closed case as well since you can select a closed case for an appointment in Medisoft core.

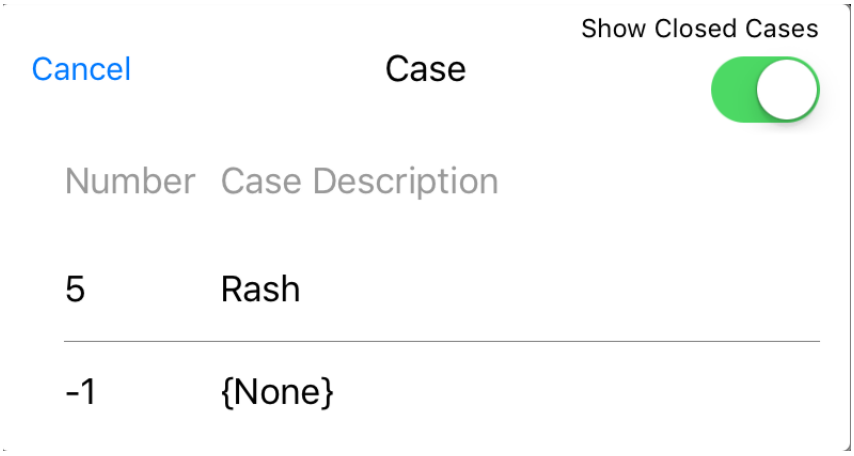


Figure 6. Case Select screen

The Show closed cases toggle button will be off unless you are in a screen where a closed case had been previously selected.

Note: This is NOT a required field.

In addition, you can see the case on the Charges screen and the Review Charges screen.

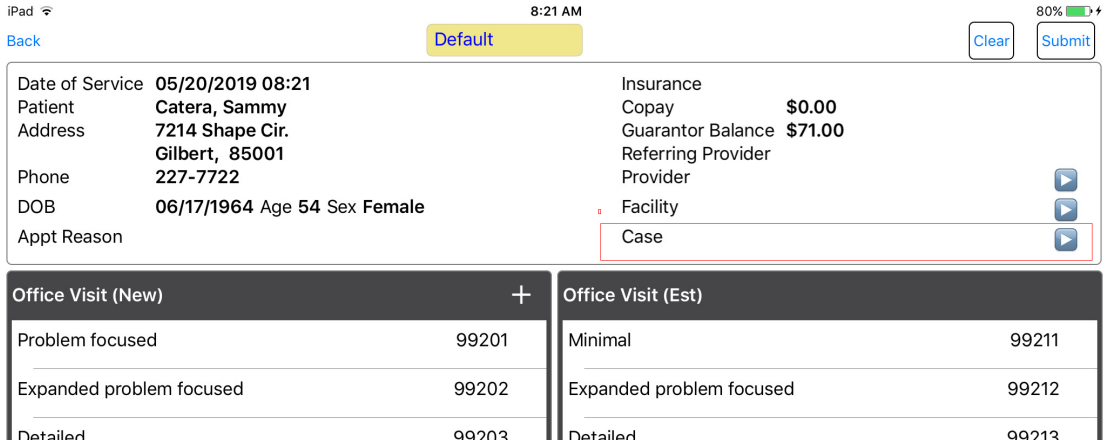


Figure 7. Charges screen

When you tap the arrow button, the Case Selection opens. Use this screen to select a case.

Appointments

Updated Schedule Appointment screen

New button

There is a new button: View Month. Click this button to view the schedule in a month format.

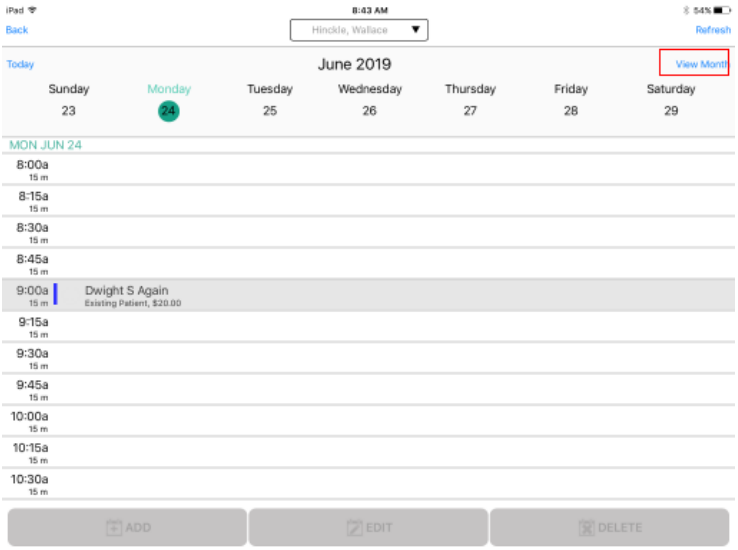


Figure 8. Schedule Appointment screen

New View Month screen

When you click the View Month button, the Month View opens. On this screen, you can select a day to use for new appointments.

Figure 9. Month View screen

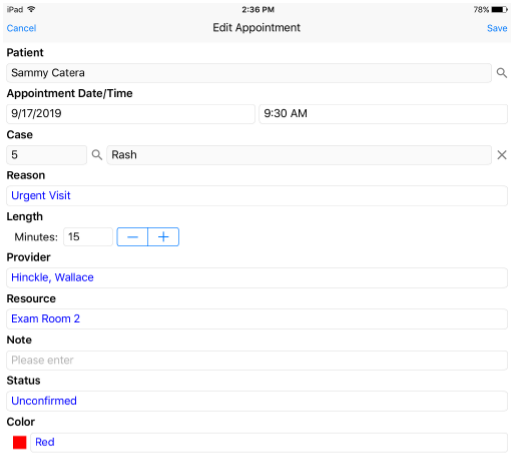
Editing appointments

You can now edit an existing single appointment using Medisoft mobile. To do so, tap the appointment you want to edit and then tap Edit at the bottom of the screen. Once you have made your changes, tap Save.

Users on earlier versions of the mobile app will see the Edit and Delete buttons but they will be inactive.

Figure 10. Appointments screen

Once you tap Edit, you will see the Edit Appointment screen.



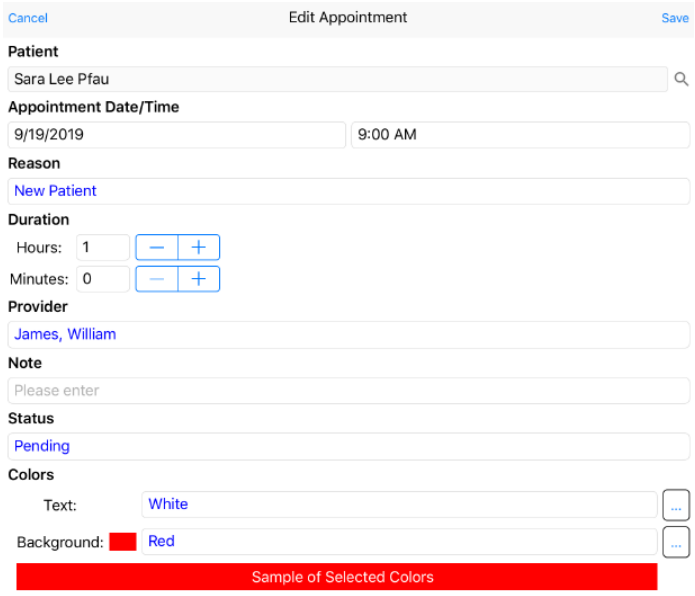


Figure 11. Edit Appointment screen

Deleting appointments.

You can now delete an existing single appointment using Medisoft Mobile. Simply tap the appointment you want to delete and then tap the Delete button at the bottom of the screen. At the confirmation, tap Yes.

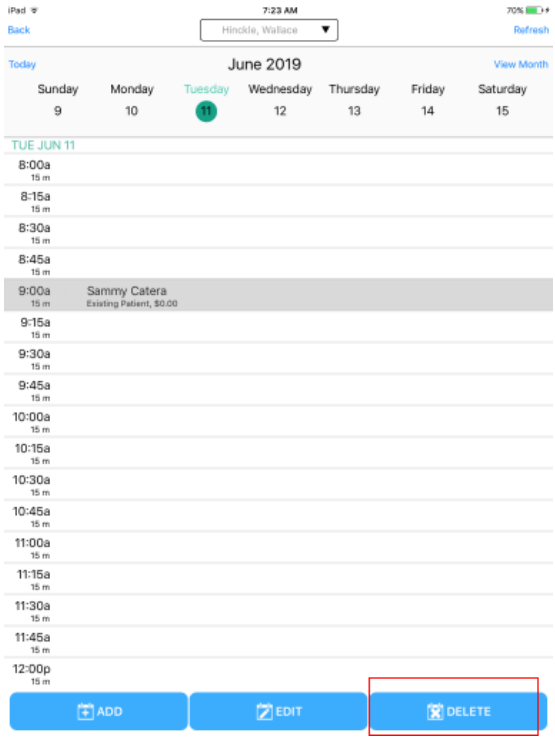


Figure 12. Appointment screen

Editing and Deleting appointments will write to your Audit report in the same way as the core product does. Medisoft core does not audit the adding of an appointment and Mobile will also not reflect that. The audit report for updates and deletion of Appointments will show the user as HL7User, since the mobile service connects as HL7User. There will not be any indication in the audit report of the specific mobile Medisoft user.

Charges

Updated Facility display

You can now see the Facility Code on the Charges screen, Review Charges screen, and the Facility select screen. This will help you select the correct facility when several facilities have the same name.

Figure 13. Facility list

Patients

New Phone Dialer

You can now call a patient using the Medisoft Mobile app. You can launch the phone dialer from three screens:

- Appointments
- Charges
- Review Charges

Note: this feature is available only on iPhone.

Updated Appointments screen

You can now launch the phone dialer from this screen.

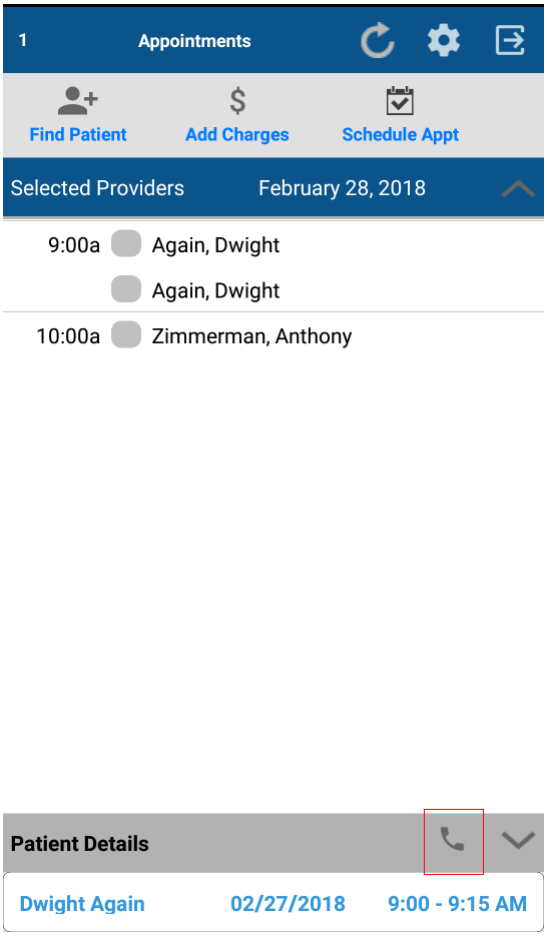


Figure 14. Appointments screen

Updated Charges screen

You can now launch the phone dialer from the Charges screen.

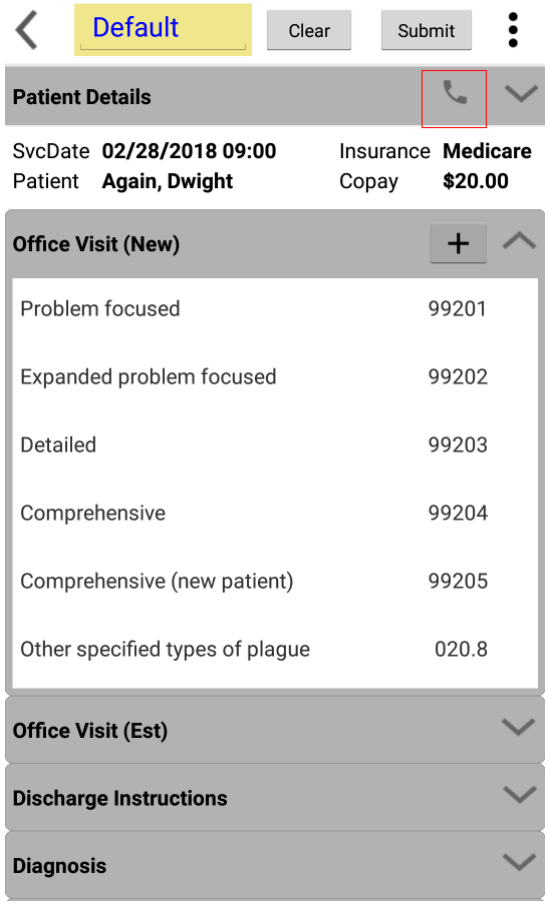


Figure 15. Charges screen

Updated Review Charges screen

You can now launch the phone dialer from the Review Charges screen.

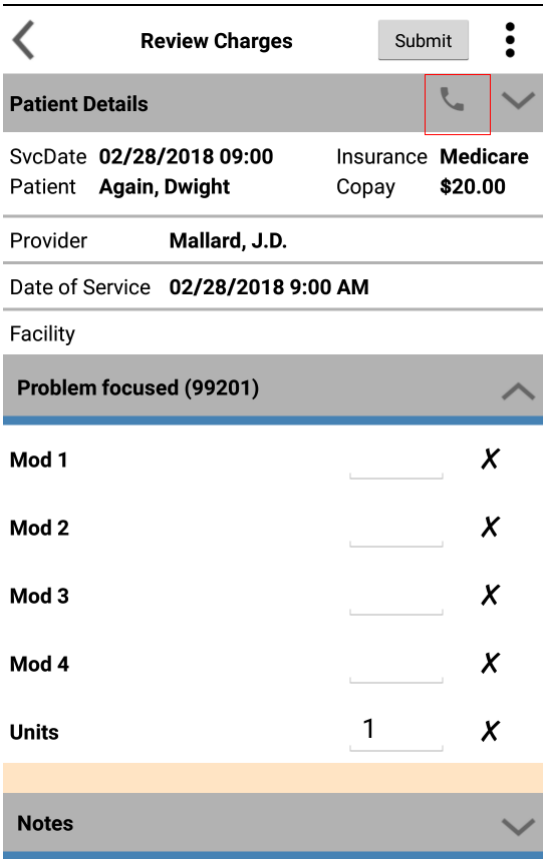


Figure 16. Review Charges screen

New Phone Dialer screen

The Phone Dialer screen is launched when you tap the phone icon on the Appointments, Charges, or Review Charges screen. Tap the phone number to make a call to the selected patient.

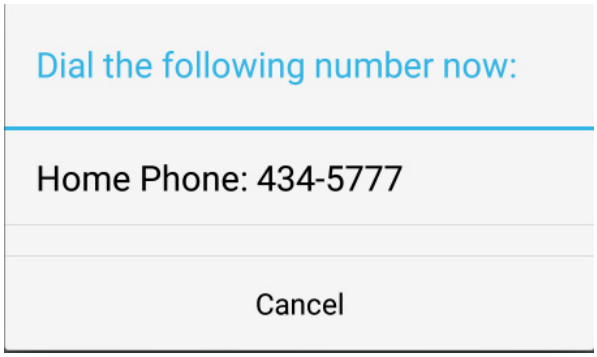


Figure 17. Phone Dialer screen

Templates

Updated default order

The templates that Medisoft Mobile uses (Intake forms, Medical History forms, and Superbills) are now ordered differently where they are stored on the server. Previously, they were ordered first by the template type and, second, by the practice name. Now, they are ordered first by the practice name, and then by the template type. For example:

- C:\ProgramData\eMDs MSL Connectivity Service\(practice name}\IntakeForms\forms
- C:\ProgramData\eMDs MSL Connectivity Service\(practice name)\MedicalHistoryTemplates\forms
- C:\ProgramData\eMDs MSL Connectivity Service\(practice name)\SuperBills\forms

Note: your forms will be automatically moved to the default folders when the new MSL service installs.

Updated user-defined location for practice forms

You can now specify the default location for your Medisoft Mobile forms/templates. However, if you change the path on the Mobile Configuration screen, the existing templates will NOT be moved automatically. You must move them manually.

Reminder: Edits to your Medical History Template are saved when you click OK on the Medical History Questionnaire; so if you edit the Medical History before you change the path, you will need to move the folder.

New field

There is a new field on the Mobile Configuration screen in Medisoft (Tools > Services > Mobile Interface Configuration): Template Path. This read-only field shows you the current path to the mobile templates/forms. The default is the location C:\ProgramData\eMDs MSL Connectivity Service\practice name.

This field is for display and you cannot access it.

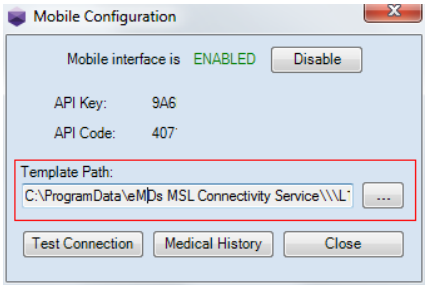


Figure 18. Mobile Interface Configuration screen

New button

To change the location of the templates/forms, use the “Find (....)' button to browse to the path you want or to create a new folder.

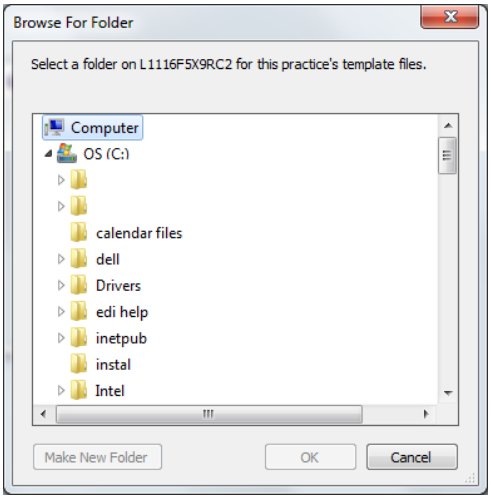


Figure 19. Browse For Folder screen

Click OK to save the changes.

Note: You can only change the path from the server computer. If you attempt to change the path from a workstation, you will receive an error message:

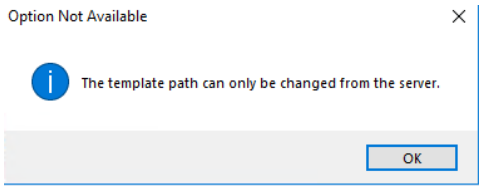


Figure 20. Option Not Available message

From the server you cannot select a mapped network drive since the service will not have access to it.

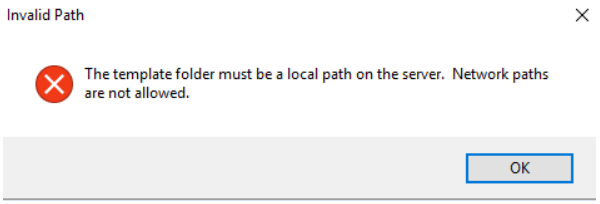


Figure 21. Invalid Path message