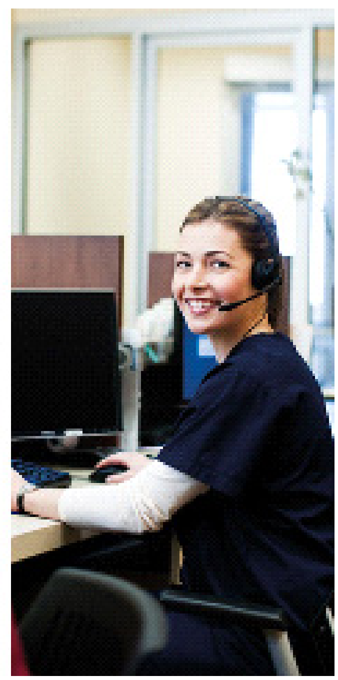
Lytec 2017

Release Notes



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Chapter 1 - Enhancements

This chapter presents a high-level description of the following enhancements to the Lytec® system.

In this chapter

A/R Tracking

There is a new A/R Tracking feature that replaces the old A/R Management feature. The new feature includes advanced filtering, as well as the ability to track insurance and patient outstanding balances.

Permissions

Permissions can be set for A/R Tracking, just as for the old A/R Management feature. For those upgrading to Lytec 2017, the following conditions apply:

- If you had A/R Work List permission, you now have A/R Tracking permission. This allows you to run the A/R Tracking tool.
- If you had A/R Management permission, you will now have both A/R Tracking and A/R Tracking Admin permissions.

Updated Security Profile screen

The Security Profile screen has been updated for the new feature.

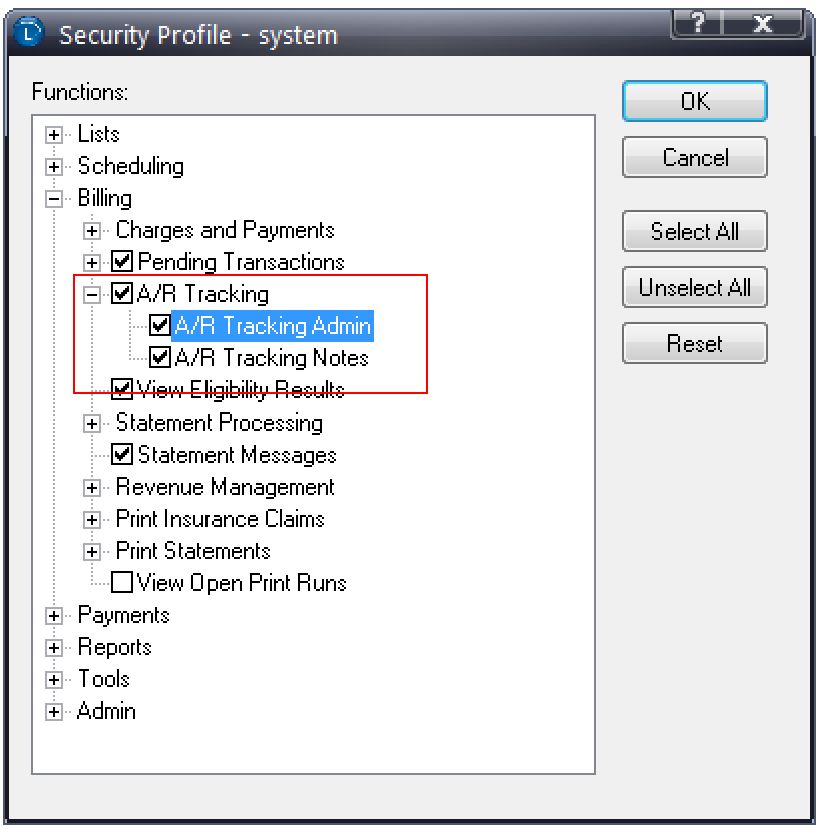

Figure 1. Security Profile screen

Performing certain tasks within A/R Tracking requires certain permissions. The table below shows the permission needed for that action or area.

Area of Lytec	Permission needed
A/R Tracking	A/R Tracking
Assign Agent/Task	A/R Tracking Admin
Add A/R Note	A/R Tracking Notes
Open Insurance	Insurance Companies
Open Patient	Patient
Open Billing	Charges & Payments

Conversion from prior releases

AR Notes and Tasks (with assigned agent/due date) will remain after the upgrade. If the billing comes into the new list, any attached notes and tasks will display on the appropriate new screen(s).

Note: A task assigned to a billing that has a zero balance will NOT display in the new tool after upgrading, since the new tool will filter out zero balances and not have an option to display zero balance billings.

In addition, if the patient record does not have a Responsible Party, the AR amounts at this level may be incorrect. Be sure to check your patient records and select a Responsible party if the record does not contain one.

New menu option

There is a new option in the Billing menu: A/R Tracking. Click this option to open the A/R Tracking screen.

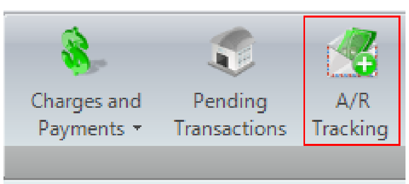

Figure 2. Billing menu

Removed options

Two options on the Billing menu have been removed: A/R Management and A/R Worklist.

A/R Tracking screen

This is the main screen for the A/R Tracking feature. It displays the filter settings and the grid shows you the information that meets the filter requirements.

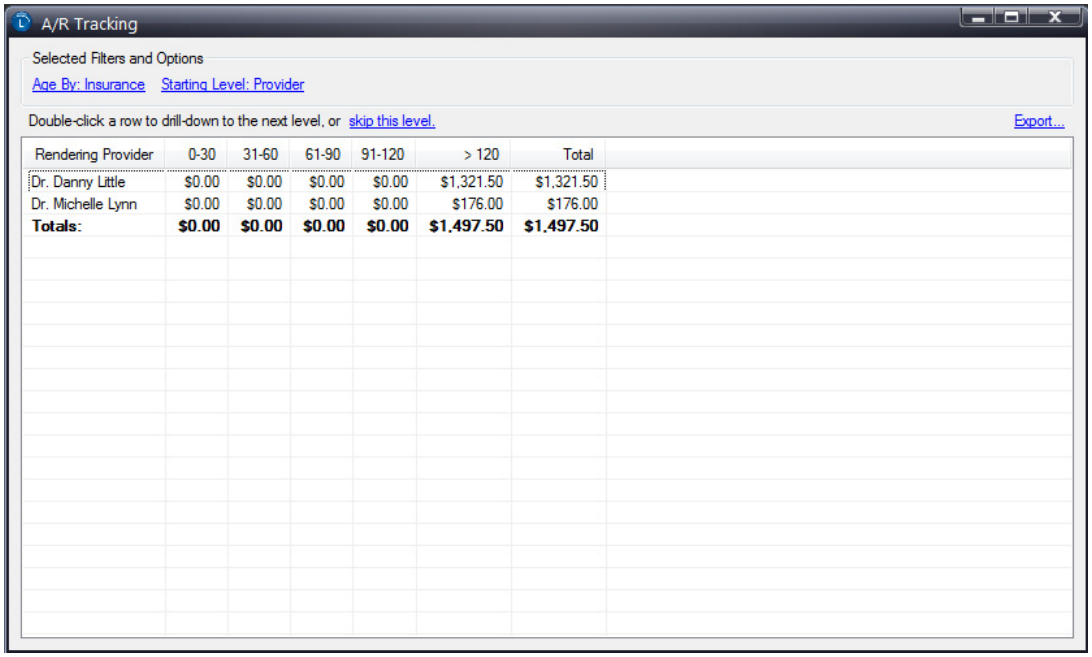

Figure 3. A/R Tracking screen

When you select AR Tracking for the first time, it displays the default filter selections of Age By Insurance, showing all outstanding Accounts Receivable. After it has been used, it will display the last filter selections per user. In addition, you can save filter selections and settings on the Filters and Options screen (see “Save Filter screen” on page 15).

Filters and Options screen

Use this screen to set up and save filtering options for your A/R tracking. You can also save your settings with a specific filter name and later select that filter name to automatically make your selections.

To open this screen, click any link in the Selected Filters and Options section on the A/R Tracking screen.

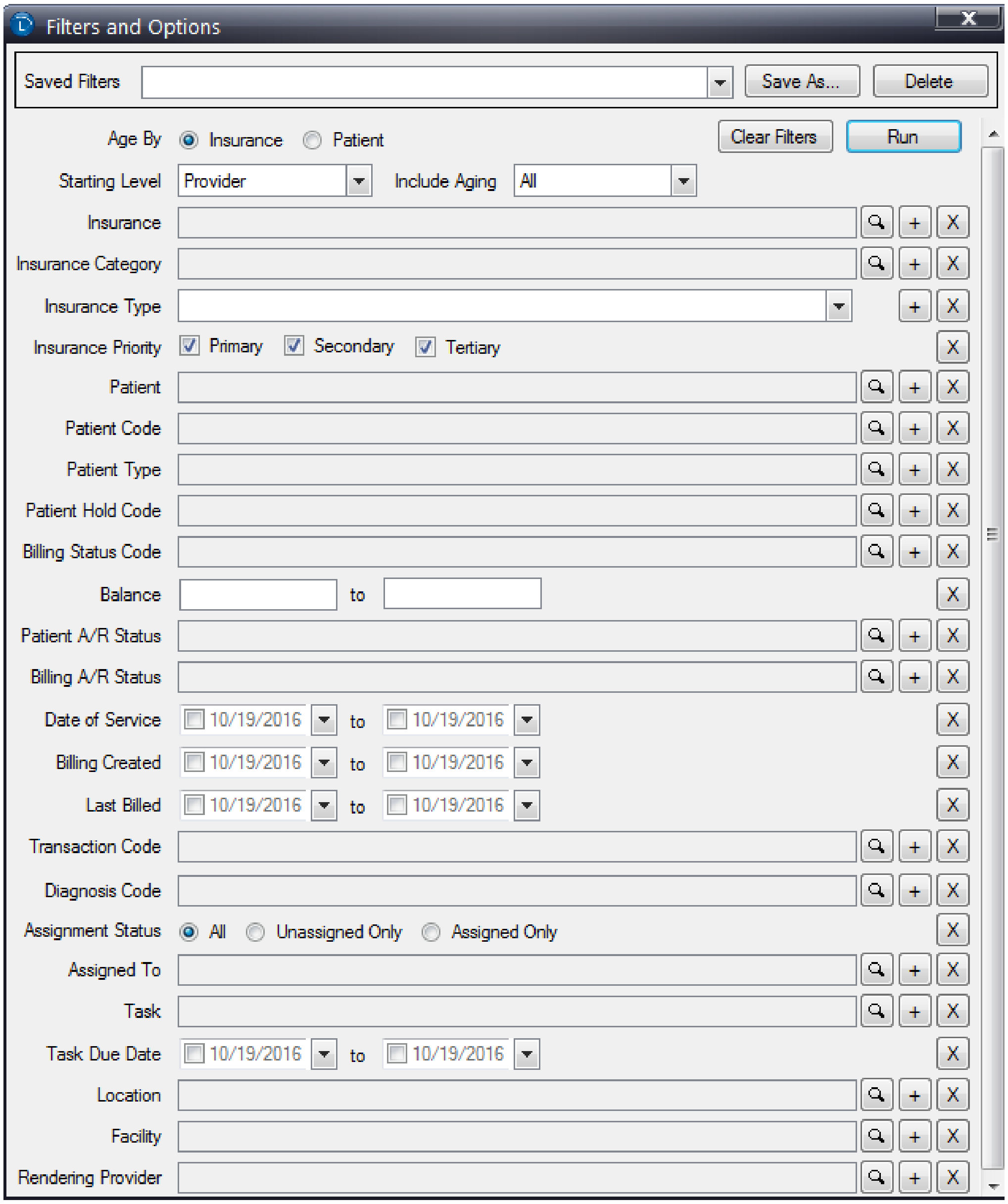

Figure 4. Filters and Options screen

The table below describes the fields and options on this screen.

Element	Description
Saved Filters	Use this drop-down to select a saved filter name.
Save as	Click this button to save your settings. The Save As screen will open and you can enter a name for your filter. See "Save Filter screen" on page 15.
Delete	Click this button to delete the selected saved filter.

Element	Description
Age By	Select this option to display either Patient or Insurance Accounts Receivable.
Clear Fields	Click this button to clear all of the filter selections. This will also reset all of the Include/Exclude filter options to Include.
Run	Click this button to run the filtering on your practice data. Results will appear on the A/R Tracking screen.
Starting Level	Select the starting level for the filter: provider, insurance, patient, billing. When the filter results appear on the A/R Tracking screen, you will be able to drill down on levels from this starting point.
Include Aging	Select which aging bracket you want to display.
Insurance	Use this field to select which insurance companies you want to include. • Click the Lookup icon to open the screen on which you can select insurance companies. You can select multiple insurances by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Insurance Category	Use this field to select which insurance categories you want to include. • Click the Lookup icon to open the screen on which you can select insurance categories. You can select multiple categories by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Insurance Type	Use this field to select the insurance type.
Insurance Priority	Select which insurance priorities you want to include. To clear the selection, click the X icon at the far right.

Element	Description
Patient	Use this field to select which patient(s) you want to include. • Click the Lookup icon to open the screen on which you can select patients. You can select multiple patients by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Patient Code	Use this field to select which patient codes you want to include. • Click the Lookup icon to open the screen on which you can select patient codes. You can select multiple patient codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Patient Type	Use this field to select which patient types you want to include. • Click the Lookup icon to open the screen on which you can select patient types. You can select multiple types by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Patient Hold Code	Use this field to select which hold codes you want to include. • Click the Lookup icon to open the screen on which you can select hold codes. You can select multiple codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.

Element	Description
Billing Status Code	Use this field to select which billing status codes you want to include. • Click the Lookup icon to open the screen on which you can select codes. You can select multiple codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Balance	Enter dollar amounts here if you want to filter by a balance range. To clear the selection, click the X icon at the far right.
Patient A/R Status	Use this field to select which patient A/R statuses you want to include. • Click the Lookup icon to open the screen on which you can select the status. You can select multiple statuses by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Billing A/R Status	Use this field to select which billing A/R statuses you want to include. • Click the Lookup icon to open the screen on which you can select statuses. You can select multiple statuses by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Date of Service	Use this field to filter by the Date of Service of the billing. Select the check box and enter the date.
Billing Created	Use this field to filter by the date the billing was created. Select the check box and enter the date.
Last Billed	Use this field to filter based on the last billed date. Select the check box and enter the date.

Element	Description
Transaction Code	Use this field to select which transaction codes you want to include. • Click the Lookup icon to open the screen on which you can select transaction codes. You can select multiple codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Diagnosis Code	Use this field to select which billing Diagnosis codes you want to include (Diagnoses 1-12). • Click the Lookup icon to open the screen on which you can select diagnosis codes. You can select multiple codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Assignment Status	Use these buttons to select an assignment status. If there is already a status assigned, you can change it. Otherwise, you can select a status.
Assigned to	Use this field to select billings assigned to particular users. • Click the Lookup icon to open the screen on which you can select users. You can select multiple codes by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Task	Use this field to select which tasks you want to include. • Click the Lookup icon to open the screen on which you can select tasks. You can select multiple tasks by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Task Due Date	Use this field to filter by a range of dates for tasks.

Element	Description
Location	Use this field to select which locations you want to include. • Click the Lookup icon to open the screen on which you can locations. You can select multiple locations by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Facility	Use this field to select which facilities you want to include. • Click the Lookup icon to open the screen on which you can select facilities. You can select multiple facilities by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.
Rendering Provider	Use this field to select which providers you want to include. • Click the Lookup icon to open the screen on which you can select providers. You can select multiple providers by using the Shift or Ctrl keys. No selection here will include all items. • Click the Toggle icon to include or exclude this filter. • Click the X icon to clear the field.

Workflow

To use the A/R Tracking feature:

1. Select A/R Tracking from the Billing menu. The A/R Tracking screen appears.
2. Click one of the links in the Selected Filers and Options section to open the Filters and Options screen (for more information on this screen, see “Save Filter screen” on page 15).
3. Make your selections for filtering information. You can save your settings by clicking Save as. Then, enter a name for your filter and click OK.
4. Click Run to run the filter. The results will appear in the A/R Tracking screen.

A/R Tracking field detail

The table below describes the fields and options on A/R Tracking screen.

Element	Description
Selected Filters and Options	This section shows you the selected filters that were used for the data in the grid. You can see the Filter Name, the Starting Level, as well as all other filters entered on the Filters and Options screen. For more information on this screen, see “Save Filter screen” on page 15). Clicking any one of the links that appear in this section will open the Filters and Options screen.
Selected Groupings	This field will appear when you click the Skip this level link. It shows you the previous levels that were displayed and allows you to return to the previous level by clicking the link.
Skip this level	Click this link to “skip” the level that is currently showing, for instance, Provider. The “highest” level is Provider, followed by Insurance, Patient, and finally Billing. These are the levels if Age by=Insurance. If Age by = Patient, they are Provider, Responsible Party, Patient and Billing. As you skip levels, the “higher” level appears in the Selected Groupings section.
Show Details of Selected Billing(s)	Click this link to display the details on all of the selected billings. The selected billings will appear at the top and the detail will appear below in a second grid. This link is available only when billings appear in the grid.
Export	Click this link to open the Export Results window. You can save the information in the grid to a *.csv (comma separated variable) file that you can open in a spreadsheet application.
Select All	Click this link to select all of the billings in the grid. This link is available only when billings appear in the grid.
Clear All	Click this link to clear all of the selected billings in the grid. This link is available only when billings appear in the grid.

Element	Description
Grid	The grid shows you the data that meets the filter requirements. Click a line item to select that item. You can also select the check box to the right of the line item when the A/R Tracking screen is displaying billing details. You can right-click on a grid line to open a menu that gives you additional options. For more information, see “Right-click menu” on page 13). When you right-click on an item, it is automatically selected. Sorting Click a column header to sort alphanumerically by that column. Any line items that were previously selected will remain selected after sorting. Double-clicking a line item Double-clicking a line item will drill-down on the details of that line item, in the same manner as clicking the Skip this level link. For instance, drilling down on a patient will open the billings for that patient. Or drilling down on a detail line of a billing will open the Charges & Payments screen for that billing.

Selected Billings grid

Billing Detail Items may be viewed after selecting one or more billings. Once billings are selected, the link Show Details of Selected Billings will become active. Click the link to see Billing Detail Items of the billing(s) in a second grid below.

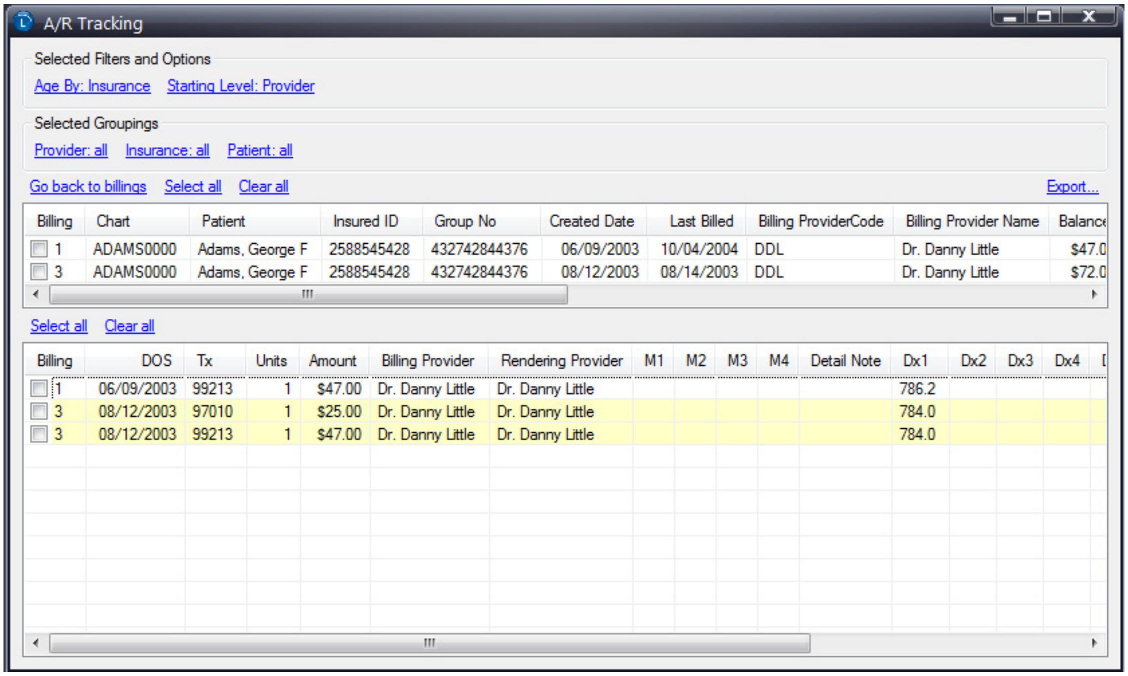

Figure 5. A/R Tracking screen with selected billings grid

This grid shows you the details of the billings. You can double-click a billing in either grid to open the Charges and Payments screen for that billing.

Right-click menu

When you right-click on a grid line on the A/R Tracking screen, this menu appears. The options are described in the table below:

The available options will depend on which level is in view.

Option	Description
Open Insurance/Patient/Billing	Select this option to view information on the item selected (insurance, patient, billing).
A/R Tracking Details	Select this option to open the A/R Management Detail screen.
Add A/R Note	Select this option to open the Append Note to Billings screen where you can add a note.

Option	Description
Assign Agent and Task	Select this option to open the Assign Selected Billings to A/R Management Agent screen. Here, you can select an agent to whom you assign the billing. When the TASK is changed, the original open task is marked Completed and the new Task is added. When the Task remains the same and only the Agent and or Due Date are changed, the original open task is left open and updated with the new Agent or Due Date. Note: you must have Admin permission to use this option.
Change Agent/Task/Due Date	Select this option to open the Assign Selected Billings to A/R Management Agent screen. Here, you can change the assigned agent, task, or due date. When the TASK is changed, the original open task is marked Completed and a new Task is added. When the Task remains the same and only the Agent and or Due Date is changed, the original open task is left open and updated with the new Agent or Due Date.
Remove Task	Select this option to remove open tasks from the selected billing and the A/R Tracker screens. The removed task will show as Completed in the A/R Management Details screen. This will only affect billings that currently have an open (non-completed) task.
Change Billing A/R Status	Select this option to open the Change A/R Status screen, on which you can change the status of the selected billings.
Change Patient A/R Status	Select this option to open the Change A/R Status screen, on which you can change the AR Status field on the patient record.
eView	Select this option to open the eView page of BillFlash's web site. You must be enrolled in BillFlash. To learn more about BillFlash, see the Online Help.
Rebill Insurance	Select this option to rebill insurance for the selected billings. You can rebill multiple billings at once with this option. Click Yes on the confirmation screen to finish the process.

Option	Description
Add Patients to Statement Print Queue	Select this option to add the patients for the selected billings to the queue for printing patient statements.
Add Patients to Collection Letter Print Queue	Select this option to add the patients for all selected billings to the queue for printing collection letters.

Refreshing the data

In most cases, the data on the screen will refresh automatically as you make changes. However, in certain situations you must re-run the query to refresh the screen data (by opening the Filters and Options screen and clicking the Run button.

Save Filter screen

This screen will open when you click Save As on the Filters and Options screen. Enter a name for your filter and click OK. Then, you can select this saved filter in the Saved Filters field on the Filters and Options screen.

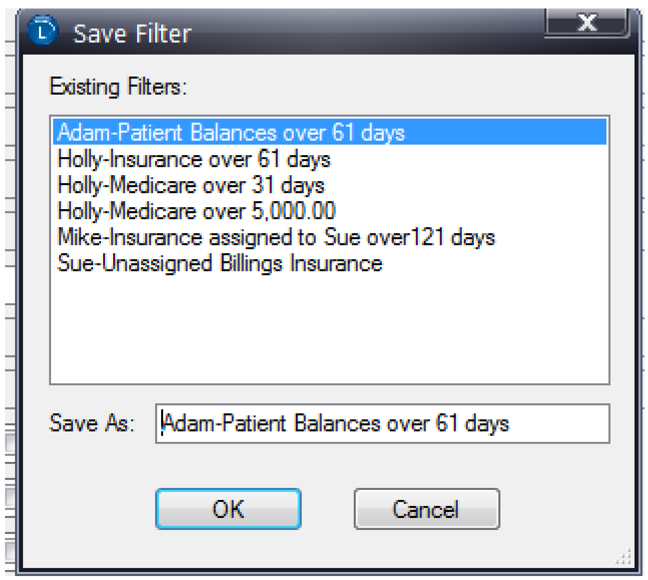

Figure 6. Save Filter screen

Renamed Screen

The A/R Management Notes screen has been renamed to A/R Tracking Notes.

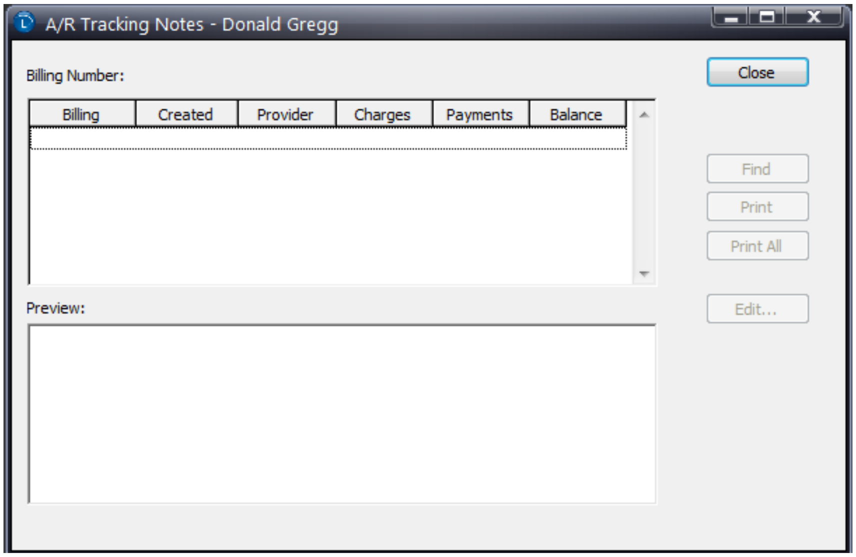

Figure 7. A/R Tracking Notes screen

Updated A/R Management Detail screen

There is a new section on the A/R Management Detail screen: A/R Tracking Status. This new section displays the A/R Status in the billing.

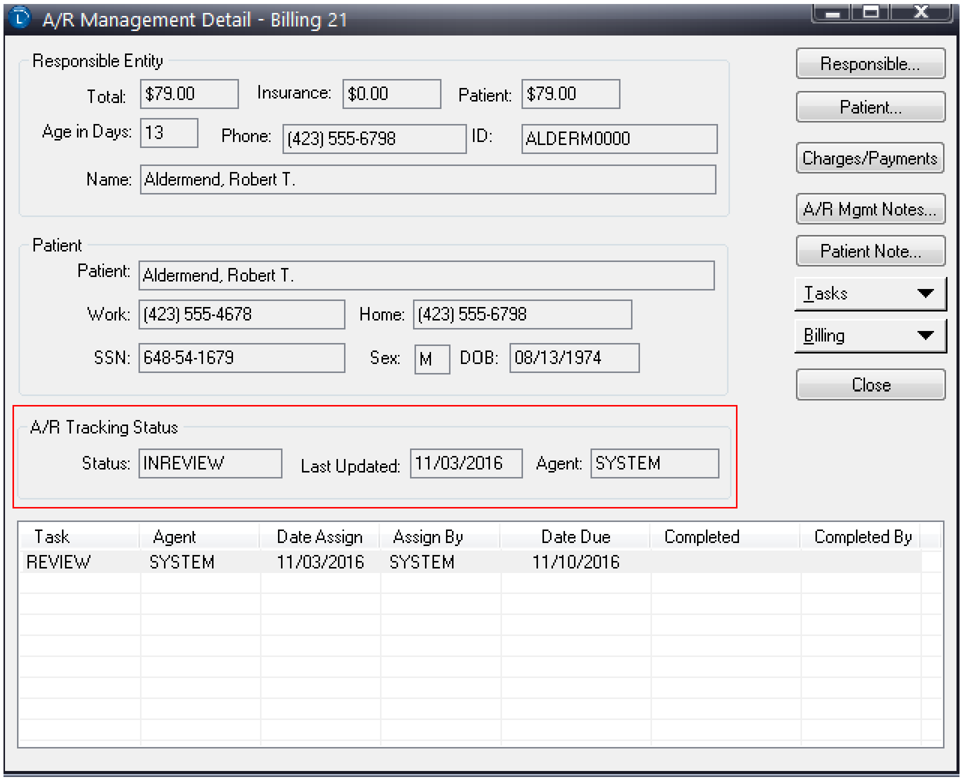

Figure 8. A/R Management Detail screen

Updated Charges and Payments screen

There is a new field on the Charges and Payments screen: A/R Status. Use this field to record the status of the charge for A/R purposes. If the AR Status has been entered on the Patient, it will default to all new billings. AR Status entered on the Billing will not default back to the Patient record.

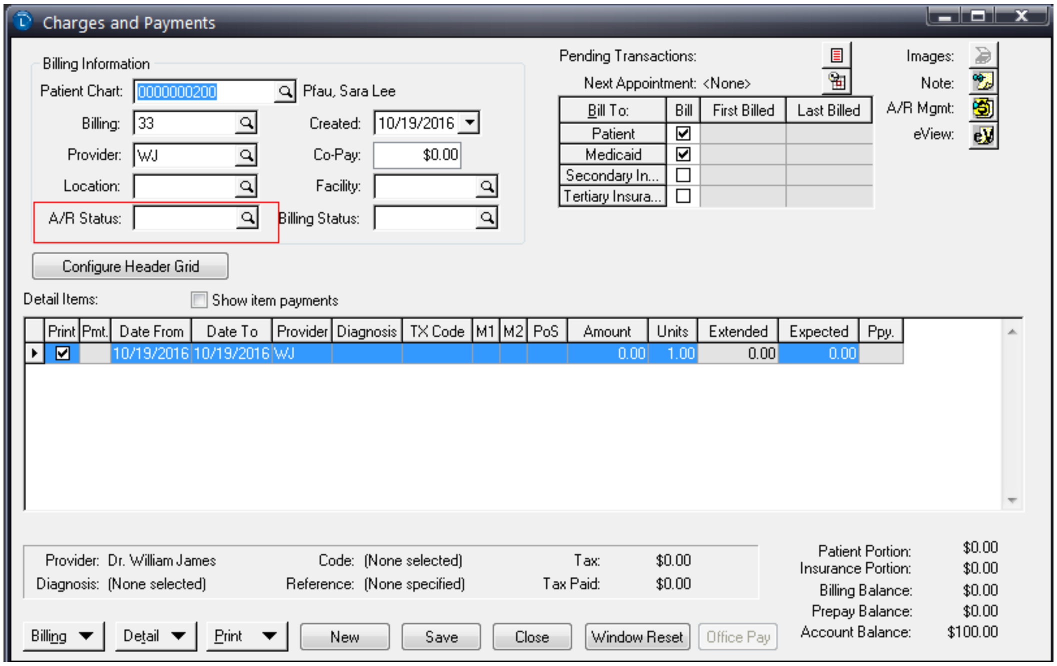

Figure 9. Charges and Payments screen

Updated Preferences screen

The Collections Aging section on the Aging tab in Preferences has been removed because the AR Tracker will use the same settings selected for patient and insurance aging in this screen.

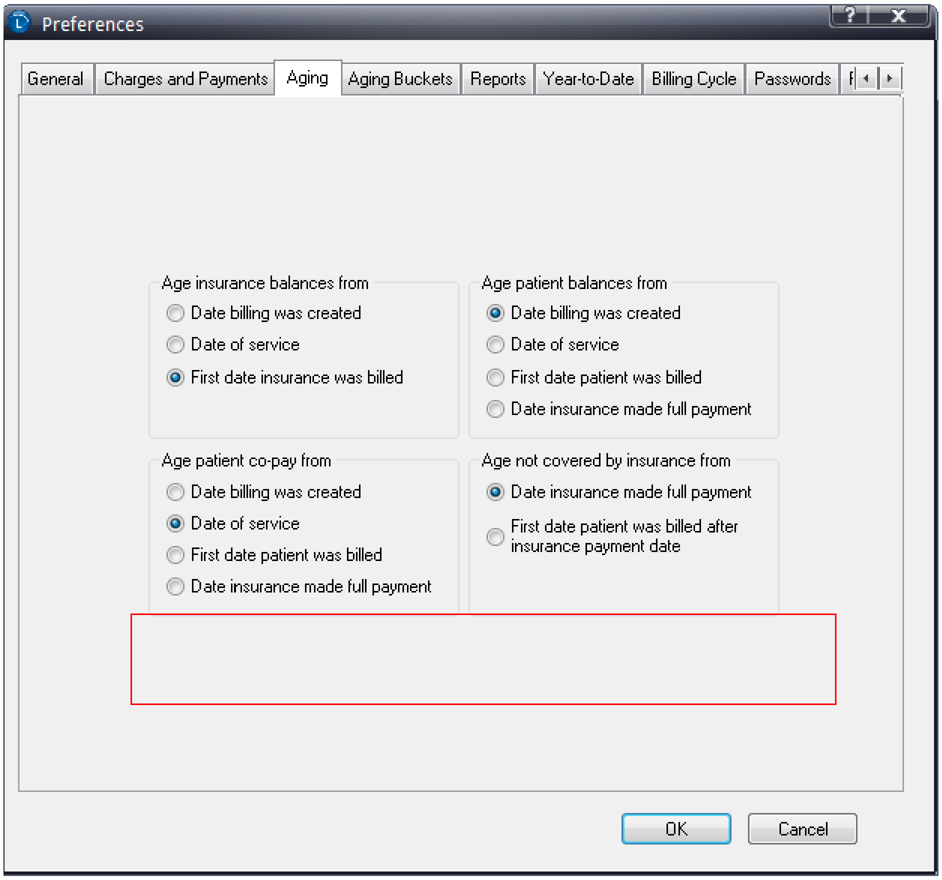

Figure 10. Preferences screen - Aging tab

Updated Statement Filter

There is a new field on the Include and Exclude tabs of the filters for Print Statements, Reprint Statements, Print Billing Cycle Statements, Collections Letters, and Transmit Statements: Billing A/R Mgmt Status.

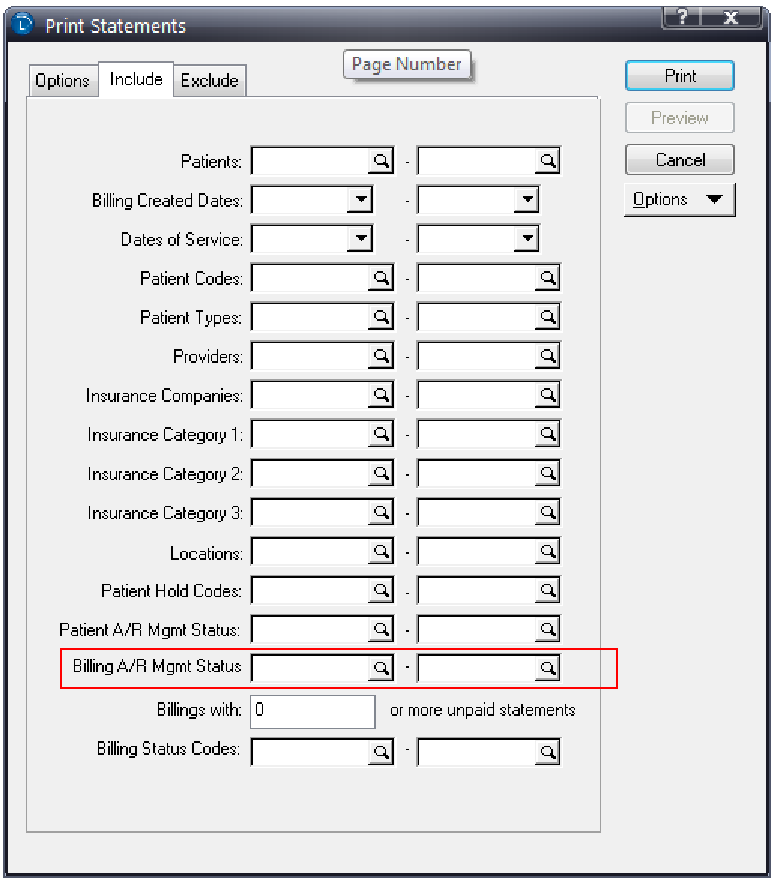

Figure 11. Print Statements - Include tab

ICD-10 Code search

Updated Find Diagnosis screen

The Find Diagnosis screen has been enhanced for ICD-10 code/description search and find.

New button

There is a new button on the Find Diagnosis screen: ICD-10 Lookup. Clicking it will open the eMDs ICD-10 Search screen.

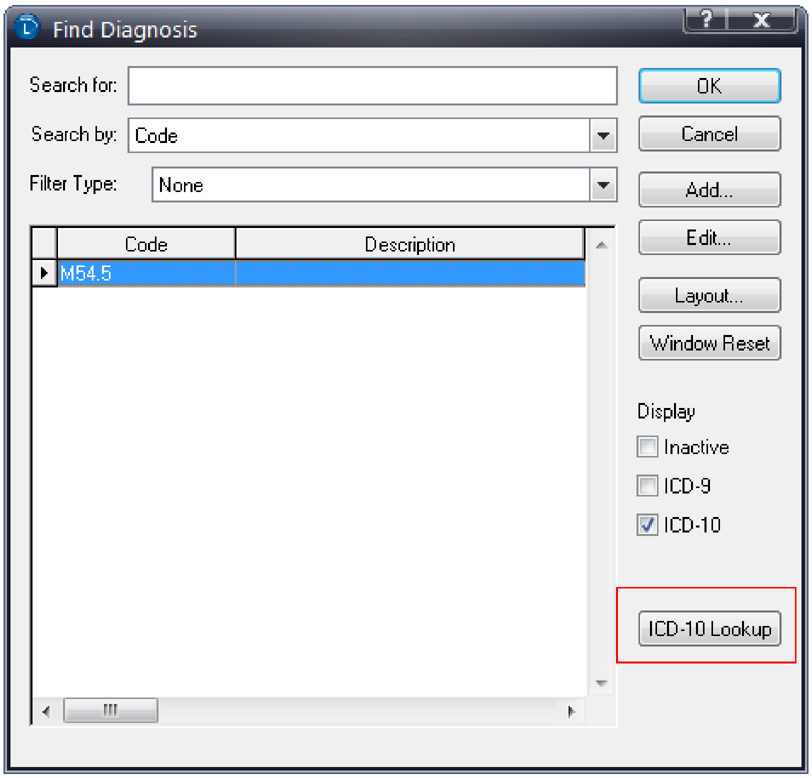

Figure 12. Find Diagnosis screen

New screen

The eMDs ICD-10 Search screen will open when you click the ICD-10 Lookup button. Use this to look up and select codes/descriptions for ICD-10 codes.

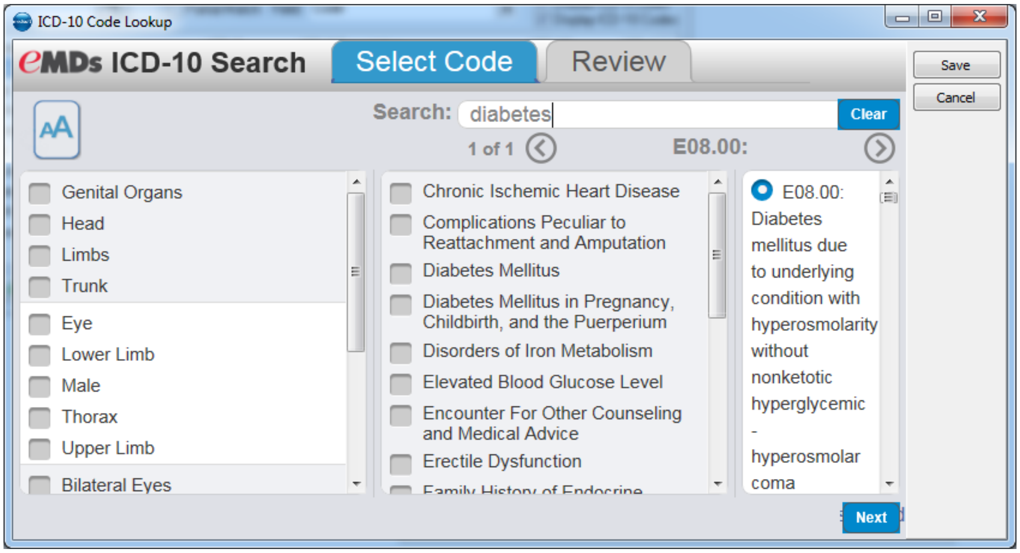

Figure 13. eMDs ICD-10 Search screen

Using this screen you can enter a code or description, such as “Diabetes,” and the Search will locate corresponding ICD-10 codes. Select one, click the OK button, and the code/description will be added to the Find Diagnosis screen and highlighted.

Also, if you highlight an ICD-9 code on the Find Diagnosis grid and click the ICD-10 Lookup button, the eMDs ICD-10 Search screen will show you corresponding ICD-10 codes for that ICD-9. You can select one or change the Search data and search for other codes.

Auto-Remind

Use Auto-Remind to create automatic reminders to send to your patients regarding upcoming appointments. Auto Remind will sync with your appointment data and allow you to send reminders via email, phone, text, and fax.

When patients mark the appointment as confirmed, this information will be sent to Lytec and update the patient's appointment.

With Auto Remind, you can potentially reduce costs, minimize no-shows, and improve customer service.

Launching Auto-remind

You can launch Auto-remind from the following locations in Lytec:

- Scheduling toolbar. Clicking this button will open Auto-remind on the main page.
- Patient view (next to the eView button). Clicking this button will open Auto-remind to the Patient page.
- Edit Appointment screen. Clicking this will open Auto-remind to the Appointment page.
- Right-click menu on the Appointment Details grid. This will open Auto-remind to the Appointment page.

The first time you click an Auto-Remind option, you will be asked to enroll. Once you have enrolled, clicking the option will launch the application on the appropriate page.

Note: Auto-remind is enabled only when the user has EDI Receivers > Save permission.

Appointment Details grid

New column

There is a new AutoRemind Status column on the Appointment Details grid.

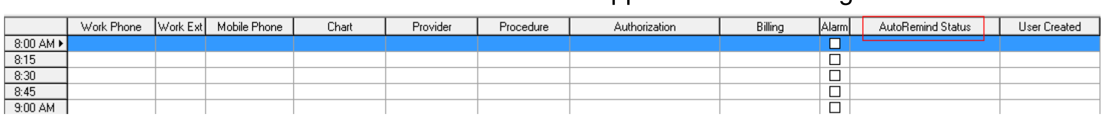

Figure 14. Appointment Details grid

This column has been added to the default layout. If you use custom layouts, you must add the column to those.

Revenue Management

The new RelayHealth Java security certificates for the EMF mailbox have been included with the installations of Lytec 2017.

For more information and the resolution for fixing the problem manually, refer to the article at this link: https://socialkb.mckesson.com/var-central/relayhealth_notice_action_required_electronic_mailbox_facility_emf_update .