


Release Notes: Atlas Chiropractic Systems Update

ver. 3.92

How do I know which version I am running?:

Check the title bar in your Atlas Software. The title bar displays the Atlas Chiropractic Software name, the Current Logged In Atlas User, the Current Logged in Windows (Computer) User and the current Program (P) and Database (D) version number.



What's New? Quick View:

- Colour banding added to the Appointment booking screen
- Patient's appointments can now be moved between providers for individual patients from the move appointments button in the appointments screen
- Patient Insurance History date billed now lists every billed date when clicked as well as several new reports to print out billing history from this screen
- Original List by Time report added back and correct report filters
- Deleted Appointments report added to track appointments deleted by users
- Services List report added to the Services setup screen
- Added ability to print day sheets for part of a day (ex. morning hours only)
- Overbooking preference can now be set per provider (no limit to appointments on the provider screen)
- Mass Remove from Insurance function added to the Insurance company's claim history screen (from patient's insurance tab click on the name of an insurance company to see the claim history) allowing multiple claims to be selected at once for unpay, rebill or removal from insurance
- CA will now receive a message if Atlas is unable to print the requested article
- Email address and password fields have been expanded to allow for longer entries
- Individual postdated payments can be allocated to providers from the patients' post dated screen
- Provider appointment types can be inactivated
- New keyboard shortcut: / key jumps to current time in the schedule
- Email reminder appointment times updated to reflect 24 hour time when 24 hour time is in use at the clinic
- Appointment types now automatically are added to the provider when there is only 1 active provider
- Automatic timeout on CHAS with customizable timeout period (in Utilities->Security Settings) for added security
- Microfilm number added to Insurance claim modification form for easier identification when contacting Manitoba Health
- Date column in Insurance Payments can be expanded to see dates billed
- Insurance Company List report added to the Insurance company setup screen
- Payment counts added to cash reports
- Options on Patient Lists to print patients without a category and/or without a patient type
- Quantity added to Inventory items on statements
- Validation screen will now confirm necessary items are present for claims in Manitoba
- Appointment length (expressed in the number of blocks used on the schedule) is now set on the providers setup screen to accommodate different timing per provider.
- Schedule tabs have been added for days not set as "open days" in clinic details but that have exception hours or regular provider hours (open days are still used to send out confirms at the specified interval)
- Warning added when appointment being booked will overrun the end of day
- Warning and report added when changing provider hours results in appointments booked at invalid times (outside of regular or exception hours)
- Provider filter added to Messages from Provider report
- Monthly Statements can be emailed to patients directly from the Monthly Statements form
- Rebuild Warning added to login and backup screens to show the date of last rebuild and errors can

- Patient status filters added to List Patients by Insurance Company report
- Neurosimulator button added to the Touch-enabled VTC
- Added a report to display financial plans created between a date range
- Added the ability to filter the AR report based on whether a patient has visited since a particular date or not
- Statement messages bolded for better visibility
- Patients in queue can be marked as adjusted via the right click menu, removing them from the queue and marking the appointment as adjusted (or complete)
- Individual line items can be removed from insurance through the Insurance Coverage History screen. You can access this screen by clicking the insurance tab and then clicking on the name of the insurance company in the active companies list.
- Seeing Multiple Providers report now sorted by and displaying the patient's default provider
- Birthday List can now be filtered based upon whether or not the patient has visited since a particular date
- Patients with status set to deceased have been removed from the Birthday list
- Additional filters added to Patients without Appointment report
- Statements and reports can be emailed directly from Atlas - see Report Toolbar section below
- Report added to display how many future appointments a patient has
- Optional date filter added to pending pitstop report
- New report added to list patients with credit cards on file that will expire within the specified date range
- Diagnosis Search tool added to patient diagnosis entry

What's Fixed? Quick View:

- Images in previous years' folders can now be directly updated through the Imasight Import feature
- Entering Care setup no longer clears the current SOAP note.
- Visual Calling reworked to prevent "invisible" names that occurred under specific rare circumstances
- Referral Analysis report reviewed for efficiency
- Appointment counts on the Appointment booking screen no longer included cancelled or rescheduled appointments
- Deleted patients removed from patients with special rates report
- Patient notes properly saving changes made while in the contact manager
- Future appointment count modified to include today's appointment if not already arrived
- SafetyNet reviewed for efficient loading
- Superbills modified to use claim number when ID number is blank
- Insurance Payments screen modified for efficient loading of the payment grid
- Additional warnings added to patient insurance screen to prevent "no phase selected" on the insurance plan
- Partial Insurance Payments no longer cause overstatement of insurance billed amounts on reports
- No Diagnosis Code warning corrected for US submissions
- Unallocated amount in insurance payments now reflects changes made outside of the insurance payments screen
- Filters now functional on the list by time/type reports
- Pitstops modified to prevent locking conflicts with other forms
- Diagnosis on superbills now reflect diagnosis as of the date of the transaction on the superbill
- Monthly statements can now print from any start date instead of reverting to the first of the selected month
- Second address line added to labels and addressbook.csv export
- Claim grouping on WCB forms in Saskatchewan has been corrected
- Dropped out patients now print on the dot note lists report under inactive patients
- Patient Lists and A/R reports have new option to include Dropped out patients
- Statement Review performed to ensure they reflect selected settings in a universal manner
- Changing the provider and/or appointment type when mapping appointments and the original provider is not

available will now reflect the newly selected provider and appointment type

- Modifying a charge that has been written off by a plan now appropriately updates the plan write-off transaction
- Right click menu in side by side view of the schedule now lists the appropriate appointment types
- Side by side view appropriately displays exception hours and vacations
- Using the Add Family Members button appropriately sets up the question set grid for the new patient
- Plan Terminating Visits report now only shows plans that has the option to end based on visits checked
- Side by Side view now properly displays appointments taking more than nine blocks
- Inventory Insurance codes and modifiers added to superbill statement
- Insurance amount displayed on transaction entry now properly calculating when service is covered by multiple phases of the same active insurance
- Date and time now properly display on all reports
- Additional checks added when signing patients in at the VTC to account for patients having appointments with multiple providers at the same time on the schedule
- Generating confirms now looks for confirms that were missed up to the time of appointment
- Recheduling appointments from the appointment screen no longer launches a new appointment screen
- Title saving for documents scanned directly into Atlas
- When displaying a single image at the VTC, the image is now centered on screen
- Clicking display patient from the contact manager now loads the patient file in front of the contact manager
- Side by Side view properly displays provider's hours when exception hours or vacations are set
- Streamlined process of adding unique insurance plans to a patient file
- Performance enhancements on transaction ledger for improved efficiency
- Opening a patient file with a stickynote attached will only open the stickynote if it is not already opened
- US 5010 submission files include up to twelve diagnosis codes
- When toggling the paid in full option in the insurance billing screen, preset co-pays are no longer cleared
- The warning message when overbooking a time slot appears only once
- Summary Tax Receipt, Detail Tax Receipt, PIF Planns, Charges Only, Invoices, Superbills can all be printed from the patient's statement menu for the patient's family
- Delete all future appointments for a patient ignores future appointments marked as arrived (ex. early arrivals)
- Changes made when mapping appointments to allow for special appointments with additional providers
- Time on VTC updating correctly

Subjective Questions:

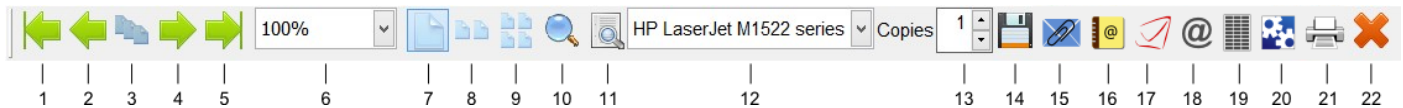
We are pleased to announce that the Subjective Questions feature has been released. This new feature can be used to guide patients through a series of questions, building the Subjective portion of the SOAP note as it goes.

For full documentation on this exciting feature please view the online manual by clicking on the link below. Be sure to review the system requirements as this feature does take advantage of larger monitors at the table and has been designed for use with touch screens.

[Subjective Questions Manual](#)

Report Toolbar:

A new toolbar has been added to report previewing with many new features including search, save as, and direct emailing capabilities.



1. First page - navigate to the first page of the report.
2. Previous page - navigate to the previous page of the report.
3. Go to page - prompts the user for a page number then navigates to that page
4. Next page - navigates to the next page of the report.
5. Last page - navigates to the last page of the report.
6. Zoom - clicking here will give the user a menu of options which will adjust the size of the report while viewing on screen.
7. One Page - view one page at a time
8. Two Pages - the system will simultaneously display two pages side-by-side
9. Four Pages - display four pages in a grid
10. Show miniatures - this will show each page as thumbnail image, allowing the user to quickly jump to a specific page.
11. Find - allows you to search for any text you specify
12. Available printers - click here to select a printer where the document will be sent when you click the print button.
13. Number of copies - allows the user to specify the number of copies of the current report to be printed.
14. Save report - after clicking this button, the user will be prompted to select a file format. Available options include an image file (such as a JPG, PNG or BMP), PDF, RTF, XLS, HTML and MHTML.
After selecting a file format, the user will be prompted for the location where they would like the file to be saved.
15. Send report by email - opens an email window with a copy of the current report attached.
16. Export address book for patients on this report - when selected, the user will be prompted for a location to save a .CSV file (which opens in Excel). This file will include the patients' First Name, Last Name, Middle Name, Name, NickName, E-Mail Address, Home Street, Home City, Home State, Home Postal Code, Home Country
17. Generate "Send Out Cards file" for patients on report. This file is suitable for uploading to www.sendoutcards.com for use with their service.
18. Send email to patients listed on this report - opens a new email message window which will be sent to each patient on the current report who has an email address in Atlas.
19. Print address labels for patients on this report
20. Printing preferences - allows the user to adjust various print settings that will change how the document appears when printed.
21. Print report - send the report to the currently selected printer.
22. Close report - closes the report window.

ICD10 & New Claim Forms (US):

To comply with the upcoming switch to the new claim forms (version 0212) and the switch to ICD10 many of the ICD10 codes will be automatically added to the list of active diagnoses in US clinics. The current ICD9 codes will remain active however support can assist with inactivating these old codes when you are ready. Inactive codes that are still assigned to a patient will continue to be submitted until they are inactivated on the individual patients.

Once the codes are in place, it will be up to the clinic to finish the ICD9 diagnoses and add the new ICD10 diagnoses to individual patients. Please note that ICD9 and ICD10 codes cannot be submitted together on the same form.

Changes have been made to the electronic 5010 submission format to increase the number of submitted diagnoses to 12 (up from 4).

The new printed claim forms allow a maximum of 12 diagnoses which can be mapped to the individual transactions (diagnosis pointers) on the VTC, Insurance Claim Modification, and Transaction Modification screens. To map diagnosis pointers check the option to "Map Diagnosis on transaction" under Setup->Initial Setup->System Settings->VTC. The form being used can be selected under Setup->Initial Setup->Clinic Details->Insurance by choosing the version being printed from the Print Form Format dropdown.

Two new screens have been added to allow users to make many form customizations without the assistance of Support. Various field values on the form can be modified from the Form Customizations screen available from the Insurance Company setup screen (Setup->Insurance Companies). These customizations can be set per insurance company per provider.

The screenshot displays the "INSURANCE FORM CUSTOMIZATIONS" window. At the top, the title bar reads "INSURANCE FORM CUSTOMIZATIONS". Below the title bar, the main heading "INSURANCE FORM CUSTOMIZATIONS" is centered. The window contains several input fields and dropdown menus for customizing form data. At the top, there are two dropdown menus: "Insurance Company:" with "Medicare" selected, and "Provider:" with "Dr John Doe" selected. Below these, the window is organized into five sections, each representing a different form box: "Box 24J", "Box 25", "Box 31", "Box 32", and "Box 33". "Box 24J" contains fields for "Type:", "Value:", and "NPI:". "Box 25" contains fields for "Type:" and "Value:". "Box 31" contains a "Value:" field. "Box 32" contains fields for "Name:", "Addr1:", "Addr2:", "NPI(a):", "Type(b):" (with a dropdown), and "Value(b):". "Box 33" contains fields for "Phone:", "Name:", "Addr1:", "Addr2:", "NPI(a):", "Type(b):" (with a dropdown), and "Value(b):". At the bottom of the window, there are two buttons: "Cancel" on the left and "Save & exit" on the right.

A second form has been added to the Insurance Billing screen to assist with manipulating the alignment of the printed form. The Form Margins screen will allow users to adjust the top, bottom, and left hand margins to ensure perfectly aligned forms. These margin settings can also be set per computer in the office to allow for printing from multiple work stations.

MARGINS For: us1500_0212

Left: 3.5000 Top: 6.2500
Bottom: 6.4500

This is the default margin setup used for all computers that do not have their own margin settings.

Cancel Save As Custom Save & eXit

Electronic File EOB (US only):

Although not available for release at this time, we are currently looking for clinics willing to beta test the Electronic File EOB processing and give constructive feedback. Please contact support if you would be willing to assist in reviewing this time saving feature.

Customer Support:

Atlas Support personnel are trained specifically on the Atlas Chiropractic Software. On occasion, they are able to assist with general computer support (networking, antivirus, and configuration). Atlas recommends that issues outside of the scope of Atlas Support be directed to the appropriate Support professional. A qualified, onsite IT technician can provide you with the most accurate information to resolve your Technical Issues. Atlas Support may be able to assist your technician in resolving issues regarding your Operating System or System Maintenance, to help facilitate the proper function of Atlas.

Support Contact Information:

Mon-Thur: 8am to 7:30pm EST Fri: 8am to 4:30pm EST

Phone: 1-866-76ATLAS (2-8527)

Fax: 1-877-342-3266

Email: support@atlaschirosys.com

Copyright / Trademark: This manual is designed to explain the features and functions of the Atlas Chiropractic Software, Generation 3. There are some features or functions that will not be available to Generation 1 customers.

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