

Release Notes: Atlas Chiropractic System Update v5.19

Version: 5.19

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

- **New Automator task: Recurring Charges**
- **Patients can be setup to PreAuthorized Payment schedule to automatically run the payment on file for the balance owing (per provider) on a preset schedule**
- Additional verification added to image import to ensure that invalid files are copied into a failed Import folder and a notice sent to the CHAS
- .PNG file support added when importing images
- <none> option added to clear referring provider from the patient's insurance setup
- New option to process EFT payments immediately (manually handle payments later refused)
- New Superbill layout for Ontario insurance submission statement (superbill code "ON")
- Visual calling window can optionally be positioned at the top of the screen
- Optionally display up to 3 room grids on CHAS
- Documents can be reordered by right clicking
- Statements can be printed for a single provider
- New option to run automator tasks even when windows user not logged in

Any existing Automator tasks should be cleared before selecting this option. Computer still needs to be booted and have access to the data and the internet.

What's Fixed

- Archiving patients will use the date the patient file was created for patients that never had a visit with the clinic
- Programming single value touch buttons no longer generates an error
- ACH payments that have been successfully queried and accepted can now be voided
- Last day option in payment frequencies will now choose the last day of the month regardless of start date
- Ensure OpenEdge payment token added immediately after deleting a previous payment token is marked as active
- Cash detail report no longer reporting "no data to report" in error when last four digits are displayed for pay type(OpenEdge)
- Fixed issue refreshing the VTC appointment ledger that could cause it to hide
- Right clicking on a SOAP note in the SOAP Edit form now displays the SOAP status menu

- Apostrophes cleared from forms when reuploading for edit
- Service/Inventory item can no longer be changed in the transaction modify form if the line has a claim against it
- Support added for special characters in custom form names
- When entering items on a transaction service amounts paid for by the plan are not reflected in the amount due
- When restoring a patient from the Archive, the 2nd address line is now also restored
- Corrected problem adding new exception hours that didn't always keep current colourbands (when option to keep them is selected)
- Inactive Vitamins disabled when adding new/editing vitamins in the Care Setup
- When an ACH/EFT payment settles (on query) the original transaction date is used when creating the payment transaction (not the current date) and the payment type is updated

Pre-Authorized Payments

This new option on the patient file, indicates patients will be paying their balance (by provider) on a specified schedule. To enroll a patient fore preAuthorized payments on the patient Edit screen check the “Process PreAuth Balance Payments” option, select a payment frequency, and the date of first payment.

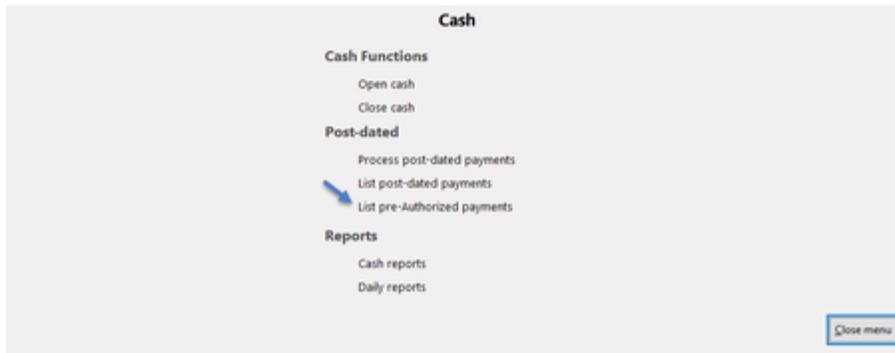
The screenshot shows the 'Patient Data' form with the 'Confirms / S.O.A.P. Settings' tab selected. A blue box highlights the 'Process PreAuth Balance Payments' checkbox, which is checked. Below it, the 'Frequency' is set to '2 Dab' and the 'First Payment' date is 'November 1, 2020'. Other tabs visible include 'Personal Information', 'System Settings', 'Rates', and 'Services'. The 'Personal Information' section shows fields for Sex, Marital Status, Birthdate, Spouse, Children, Occupation, Employer, Reason, Emergency contact, and Notes. The 'System Settings' section shows fields for Card/Fob #, ID, Provider, Language, Title, First, Middle, Last, Nickname, Address, City/Town, Province, Country, Postal Code, E-Mail, and Phone. The 'Rates' section shows fields for Financial Data, Recurring Charges, and Record Sound. The 'Services' section shows a list of family members: Jane Doe, Billy Doe, and JohnnyBoi Doe.

Once selected, the patient's balance per provider will be displayed for review as these balances are used to process payments.

If the balances are not valid, turn off Process PreAuth to prevent payment processing until the balances can be corrected. Once they are correct, turn Process PreAuth back on.

PreAuthorized payments will appear in the Postdated payment screen when they become due. These can be processed from here either individually or by using the process all button, just like the postdated payments. If using the Automator to process postdated payments, preAuthorized payments will be processed when they are due alongside any postdated payments by the Automator.

Upcoming PreAuthorized payments can be reviewed before they become due by selecting the “List pre-Authorized payments” option from the Cash menu.



The report will list the patients set up for PreAuthorized payments that currently have a balance owing. The patient balance on the date the payment is due will be used when processing payments, which may not match the balance on the report if charges are incurred between running the report and the payment due date.

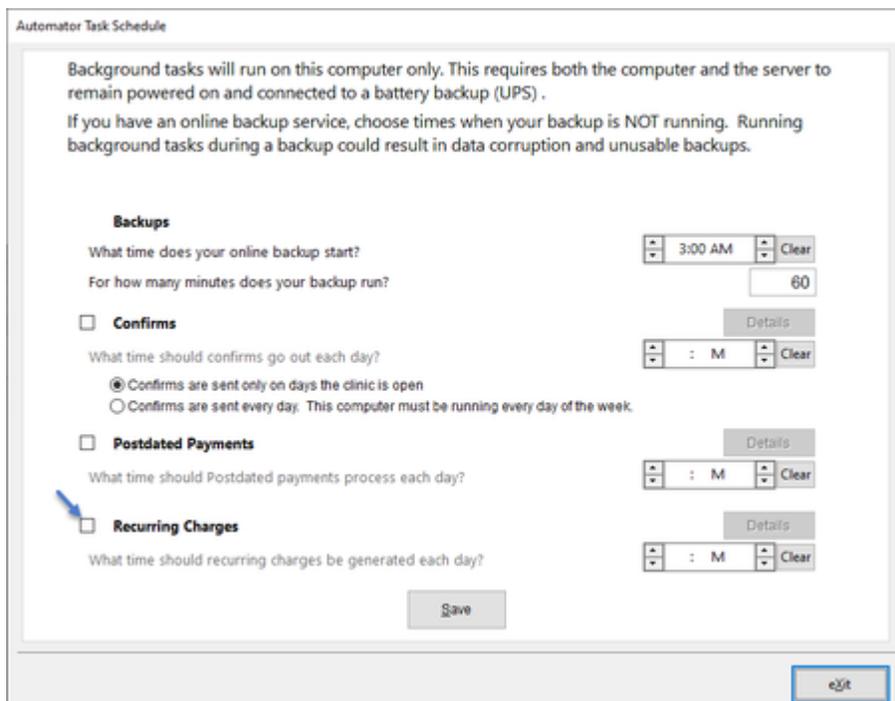
PRE-AUTHORIZED PAYMENTS
From Oct 1, 2020 to Dec 31, 2020
Future amounts will change - current balance displayed
Only patients with a balance owing are included

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Payment Date	Patient	Current Amount
November 1, 2020		
21	Doe, Jane	29.00
Total of		1 payments 29.00
Dr. Stephen Butler has a total of		1 payments 29.00

Recurring Charges

New Automator process added to automatically add charges to patient accounts on a recurring schedule. This new option can be turned on by checking "Recurring Charges" from the Automator Task Schedule.



To set a patient to be billed for a recurring charge, find the patient, click edit and click on "Recurring Charges".

Recurring Charges

Recurring charges for Jane Doe

Service	Provider	Frequency	Start Date	Times Left	Hold	Hold Times	Last Charged Date	Next Charge Date	Final Charge Date	Inactive
Membership Fee	Henry	3 Monthly	Oct 22/2020	6	<input type="checkbox"/>			Oct 31/2020	Mar 31/2021	<input type="checkbox"/>

For a continuing charge leave the times left blank Inactive records not shown For an indefinite hold leave the hold times blank

Show Inactive

Add Edit eXit

After clicking Add:

1. Select the service, provider, frequency, start date and number of times to charge the patient. For indefinite charges leave the times left as 0.
2. Based on entries in step 1, the next charge date and final charge date are calculated. Once payments begin, this will also display the last charged date.
3. If necessary, a hold can be placed on the charges for a set number of cycles or if hold times is left as 0 an indefinite hold is placed on charges. Holds will extend the final charge date which will be recalculated. Alternatively charges can be set to inactive to cancel any further charges. Completed recurring charges will automatically inactivate after the final charge is added.

If the recurring charges option is not turned on in the automator or the automator task fails to run, it will automatically enter all missed charges when it is able to run successfully (dated as scheduled).

After recurring charges are processed, a message is sent to the CHAS and a report created. To view the report, select "Recurring Charges" from the reports menu.



All batches for the selected date range (defaulting to today) are listed with the number of charges processed.

From date: January 1, 2020 To date: October 22, 2020

Recurring Charge Batches		
Run Date	Count	
September 18, 2020 02:15 PM	21	Detail
September 9, 2020 11:15 AM	62	Detail
September 3, 2020 10:26 PM	10	Detail
September 2, 2020 03:16 PM	11	Detail
September 2, 2020 02:12 PM	0	Detail
September 2, 2020 02:11 PM	0	Detail
September 2, 2020 02:03 PM	1	Detail
August 31, 2020 01:34 PM	1	Detail

Details for all batches

To view details for a batch click on the detail button next to the number of charges included in the batch.

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: 1-226-315-1900

Email: support@atlaschirosys.com

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