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.



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.

Cash	
Cash Functions	
Open cash	
Close cash	
Post-dated	
Process post-dated payments	
List post-dated payments	
List pre-Authorized payments	
Reports	
Cash reports	
Daily reports	
	Ωlose 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

Oct 22, 2020 04:56:41 PM				Page 1				
Payment Date		Patient				Current Amount		
			Dr. Bie	phen Balls				
ovember 1, 202	0							
	21	Doe, Jane					29.00	
				Total of	1	payments	29.00	
		1.1	when the set	as 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.

Automator Task Schedule	
Background tasks will run on this computer only. This requires both t remain powered on and connected to a battery backup (UPS) .	the computer and the server to
If you have an online backup service, choose times when your backup background tasks during a backup could result in data corruption and	p is NOT running. Running d unusable backups.
Backups	
What time does your online backup start?	🕂 3:00 AM 🕂 Clear
For how many minutes does your backup run?	60
Confirms	Details
What time should confirms go out each day?	÷ : M ÷ Clear
Confirms are sent only on days the clinic is open Confirms are sent every day. This computer must be running every day of the	week.
Postdated Payments	Details
What time should Postdated payments process each day?	* : M * Clear
Recurring Charges	Details
What time should recurring charges be generated each day?	🔺 : M 🔺 Clear
Save	
	eğit

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

\Lambda Recurrir	ng Charges									. • 💌
			Recur	ring charge	s for Ja	ine Doe				
	Service	Provider	Frequency	Start Date	Times H Left	Hold Hold Times	Last Charged Date	Next Charge Date	Final Charge Date	Inactive
Memb	ership Fee	Henry	3 Monthly	Oct 22/2020	6		2	Oct 31/2020	Mar 31/2021	
F	or a continuing charge	e leave the times left b	lank	Inactive records	s not show	vn	For an indefir	nite hold leave the	e hold times blank	:
				Show Ina	ctive					
				Add	Edit					e <u>X</u> it

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.

	Reports	
Appointment Reports	Financial Reports	Communication Reports
Appointment status	Cash reports	Email history
Patients without appointment	Daily reports	Pending pitstops
Patients with appointments	Accounts receivable	Pitstop history
Appointments by user	Recurring charges	Contact manager lists
Plan Reports	Patient Reports	Inventory Reports
Active plans	Patient Lists	inventory items
Terminating by date	New patients	inventory sales
Terminating by visit	Birthday lists	Sales by patient
Created between	Terminating care	Reorder list
Patient Financial	Statistics Reports	General Reports
Patient transactions	Referral Analysis	Insurance Reports
Special services	Time Analysis	Automator Reports
Special rates	Inactive Analysis	COVID Report
		Visitor Report
Patient Data		
Patient with confirms		
Patients with no sound		
Patients with no picture		
Patients with no x-ray		
	Click on green headings to see additional op	ctions Close men

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

A Recurring Charges			
From date Januar	y 1, 2020	o date October 22, 2020	
	Recurring Charg	ge Batches	
	Run Date	Count	
	September 18, 2020 02:15 PM	21 Detail	
	September 9, 2020 11:15 AM	2 62 Detail	
	September 3, 2020 10:26 PM	2 10 Detail	
	September 2, 2020 03:16 PM	11 Detail	
	September 2, 2020 02:12 PM	0 Detail	Details for all
	September 2, 2020 02:11 PM	0 Detail	batches
	September 2, 2020 02:03 PM	1 Detail	
	August 31, 2020 01:34 PM	1 Detail	
		3	
	And a second		
with which we	Contraction of the local division of the loc		water the second when

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

🔨 Recurring Charges								×
		1 For	r September 9, 2020	11:15 AM				
Provider	ld	Patient Name	Date		Service Amount	Insurance		~
Sugarum Ballon	13	tion Regilier	Sep 9, 2020	Massage	25.0	0		
Progime - Saline	13	tion, Stagilture	Sep 9, 2020	workshop	0.0	0		
	13	the legiture	Sep 9, 2020	Massage	25.0	00	FINAL	
	13	tion, Degelines	Sep 9, 2020	workshop	0.0	0 (3	5	
Depiner Rates	13	the Inglish	Sep 9, 2020	workshop	0.0	00		
Inspires Salar	13	tion, Stagelines	Sep 9, 2020	workshop	0.0	00		
Depiner Sales	13	the Inglish	Sep 9, 2020	workshop	0.0	00		
Inspirer Sales	13	tion, Stagelines	Sep 9, 2020	Massage	25.0	00		
Depirer Relet	13	the Inglish	Sep 9, 2020	workshop	0.0	00		
Depiter Sales	46	real light	Sep 9, 2020	workshop	0.0	00		
Peoplese Rates	46	and County	Sep 9, 2020	workshop	0.0	00		
Depirer Sales	46	real light	Sep 9, 2020	workshop	0.0	00		
Peoplese Rates	46	and County I	Sep 9, 2020	workshop	0.0	00		
Depiter Sales	46	and Land	Sep 9, 2020	workshop	0.0	00		
Depiner Rates	46	and County	Sep 9, 2020	workshop	0.0	00		
Ingite later	31	eten line	Sep 9, 2020	Adjustment	30.0	00		
Ingite fairs	31	and the	Sep 9, 2020	Adjustment	30.0	00		
Ingite later	31	eres line	Sep 9, 2020	Adjustment	30.0	00		
Depirer Rates	31	and the	Sep 9, 2020	Adjustment	30.0	00		
Depirer Sales	31	eres line	Sep 9, 2020	Adjustment	30.0	00		
Peoplese Ration	31	and the	Sep 9, 2020	Adjustment	30.0	00		
Program Salar	31	eres line	Sep 9, 2020	Adjustment	30.0	00		
Depirer Relot	31	and the	Sep 9, 2020	Adjustment	30.0	00		
Program Salar	31	etes line	Sep 9, 2020	Adjustment	30.0	00		
The Name Testing	31	and the	Sen 9 2020	∆diustment	30 (n		۷.
			Click here to return to th batches	e list of				
			Print				e <u>X</u> it	

- 1. The date or range of the batch is displayed at the top.
- 2. The details of the individual charge including patient, provider, service, amount are displayed.
- 3. When the charge is the last scheduled charge for the patient, "FINAL" appears in the last column to indicate this.
- 4. "Click to return to the list of batches" will return to the previous screen to select another date range or batch to view.
- 5. Print will print the details into a report if needed.

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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