

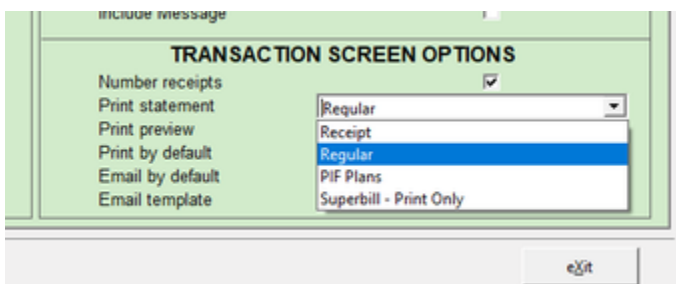
Release Notes: Atlas Chiropractic System Update v5.37

Version: 5.37

1 How do I know which version I am running?

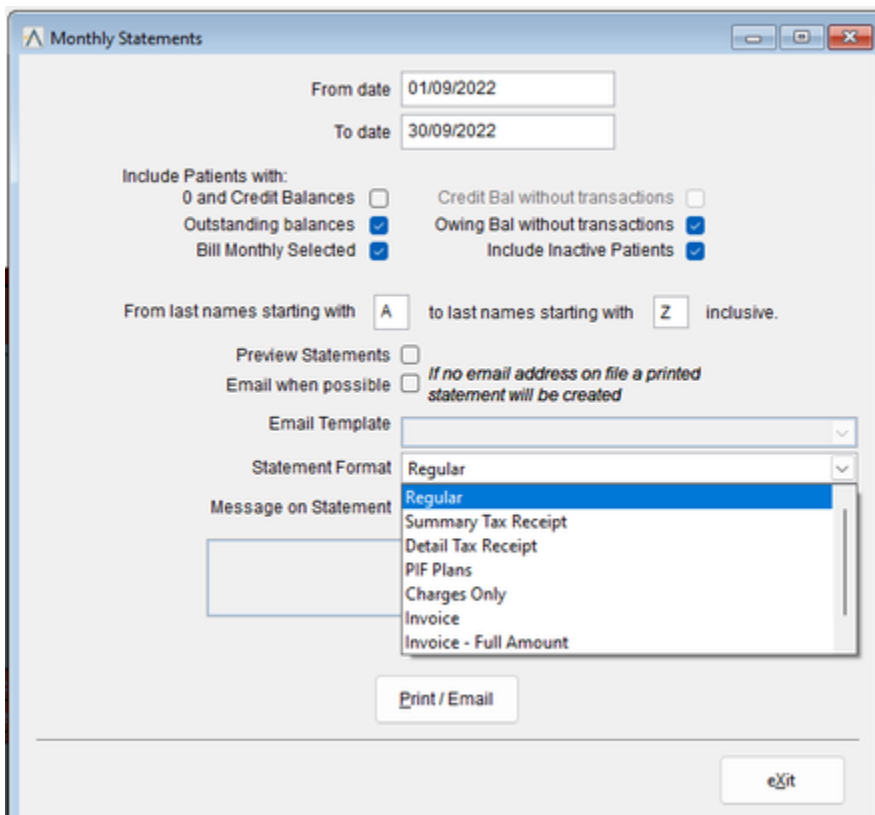
Check the title bar in your Atlas Software. The title bar displays the Atlas Chiropractic Software name, the Current Logged In Atlas User, the Current Logged in Windows (Computer) User and the current Program (P) and Database (D) version number.

Emailed Receipts



Expanding on the existing optional emailed receipt from transactions and postdated payments, Atlas now allows for alternative statement formats to be used as the receipt. On the CHAS > Setup menu, under the Basic Setup heading, click System settings. On the Statement/Superbill tab, in the Transaction screen options, the print statement option has been changed to a dropdown to allow for statements other than the regular statement to be used.

Enhanced “Monthly Statements”



The existing Monthly Statements option (CHAS>Billing>Patient>Produce monthly statements) has been given some powerful upgrades to make it a more versatile tool.

Additional patient filters added to help target the correct patients including optionally excluding patients that have not had transactions in the selected date range.

The new bill monthly selected checkbox when checked keeps the original functionality of Monthly statements but when unchecked will include all active patients regardless of that bill monthly setting on the patient file.

Additionally the include inactive patients will allow users to exclude inactive patients or include them as needed.

Users can now select the statement format to send to the selected patients from a list of available formats to better suit the needs of the patient.

Automator: Scheduled Statements

Statements can be scheduled to be emailed to patients on a regular schedule, set on a per patient basis. The statement schedule is set on the patient file by clicking edit and selecting the new Statement Schedule tab.

Statement Format	Balance Owing	Credit Balance	No Trans	Patient Email	Email	Frequency	Next Date	Last Sent	Inactive
Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Daily	18/10/2022		<input type="checkbox"/>
Detail Tax Receipt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	mom@family.com	yearly	01/01/2023		<input type="checkbox"/>
Regular	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Monthly	01/11/2022		<input type="checkbox"/>

Inactive Statements not shown

Show Inactive Add

Simply select the statement type to send, any balance/transaction filters, set the email to use (either the patient's or a separate email), the frequency and when to start.

Just like other Automator tasks, the scheduled statement task can be turned on under Utilities>Automator

Scheduled Statements Details

What time should scheduled statements be sent each day? After closing is recommended to ensure all of the current day is included.

8:00 PM Clear

Save

It is recommended to schedule statements to send at the end of the day to include all of the current day's transactions.

What's New

- **New Automator task for scheduling Patient Statement (by email)**
- Additional Notes section on VTC, alternating with Problem section
- Option to view documents in Alphabetical order rather than manually ordering
- Moved check for license to before errorscan
- Clinic information displayed at the top of all Powerpay receipts
- Select which statement type to print/email from transaction screen
- Appointment time added to detailed patient queue
- Option to save new Online patients as Leads
- Sort Insurance Validation by patient name
- Statement generation reviewed and edited for increased efficiency
- Option to leave patient on safetynet even after booking a new appointment
- Option when printing monthly statements to only include 0/credit balances when patient has a transaction within the specified date range
- Option when generating Monthly Statements to include All Patients
- Ability to select which statement to use when generating Monthly statements
- Warning added if ACS Core is closed manually
- New form in Setup>Financial Setup menu for changing the displayed description for special transaction types

What's Fixed

- Correction made when calculating Online Booking stats to ensure multiple stats are calculated
- Loading patient archive without any archived patients now notifies user and closes archive
- Statement code ON can be attached to email from preview
- When modifying auto renew on the insurance plan from patient insurance file reload current plan after save
- Provider name on VTC initializes to room's assigned provider
- Initialized payment method for postdated payments to cheque
- Taxes no longer hide when changing the date while entering a transaction
- While processing EOB files, process to locate matching patients modified to increase possible matches
- When selecting a service package, ensure the correct package name is displayed on the transaction screen
- Corrected the attachment name when sending appointment calendars via email
- Ensure plan id logged and tax calculated (where applicable) on charges generated at arrival
- When displaying or hiding SOAP buttons while programming Flex buttons ensure unique references to avoid potential confusion
- Modified grouping of the us1500 form to allow for a patient to have 2 claims with the same insurance company and plan type
- New calendar for changing image date
- Services can no longer be discontinued if attached to appointment types
- Validate insurance now looks for blank claim/ID field
- Caps Lock warning on sign in screen updated as soon as key is pressed
- When syncing forms, if form already attached to patient do not add a second document
- Support added to us1500 forms for patients with multiple home phone numbers
- When changing the expiry date on insurance the expired status is updated
- Patient Nickname used by sign in when set on patient profile
- Ensure full EIN number displays on us1500 form regardless of method used to print
- Statements sent from transactions, postdated, monthly statements, automator all respect the standard statement options including statement code, group by pro, no insurance on statements, etc
- Returning to VTC from CHAS while menu is currently open properly restores VTC
- In the even that an error occurs during update, the error is properly logged and user notified
- Problem section refreshed after returning from the edit problems screen
- Entering multiple problems at a time remembers the order in which they are added
- When multiple family members arrived by a single sign in, ensure the correct patient is flagged for Xrays
- Scrolling function for images on VTC modified for smoother function
- When entering family payments, ensure partial changes are saved before proceeding to ensure payments and transfers appear as expected
- When viewing multiple contact manager screens ensure phone numbers populate correctly
- Scheduling issue with Automator and daylight savings time changes corrected for newly scheduled tasks
- Unarrived patient arrivals no longer being included in family counts in room grid
- When adding insurance companies to insurance payment, they are only added if not already included on the payment
- Added/corrected logic to limit the date range allowed for the current user to all financial reports
- Ensured the previously claimed amounts are factored in when adding an insurance claim after the time of transaction
- Problem display on VTC can correctly display notes including a semicolon (;)
- Search by phone number correctly respects the option to use nicknames
- Additional validation added when searching by birthdate to ensure a valid date is used
- CHAS keyboard shortcut "/" ensures current time is visible on the day's grid
- Changes made to re-arrival process to ensure proper updating of appointment status
- Manitoba WCB modified to support large submissions
- Additional validation added to transaction transfers
- Unlocked scroll bar in the patient phone number display on CHAS
- Ensure blank computer locations are not saved
- Check additional response codes when querying ACH status

- Category pricing validation added to prevent saving when no category selected
- Additional checks for email libraries when sending SMS messages
- Additional validation added when setting insurance expiry dates based on set renewal month/day
- Changed Name header for the summary page of the Accounts Receivable report to Provider name
- Notify user when email template is missing attachments/images
- Support added for imaging import for pdf files (added as documents)
- Scrollbars removed from image thumbnails on CHAS
- Ensure Passive mode is on for FTP transfer of updates
- Manually added confirms without an appointment display on confirm tab of Safetynet
- When modifying US insurance claims, check added for changes to NDC Units
- When searching for an insurance payment, include date filter when set
- Prevent partially written arrival from being called to a table
- When cancelling an insurance cheque, ensure all transactions created by the cheque entry are voided
- Insurance payments screen only shows inactive insurance companies when option to show inactive is selected
- Replaced family tree view with a different display to prevent occasional OLE error on some computers
- Maximum height on phone numbers set when viewing safetynet contacts
- Special appointment types missing an associated service are disregarded
- Warning added to appointment types setup when on VTC is selected but no associated service is set
- When patient is arrived for multiple providers at the same time ensure the correct arrival is marked as treated when posted at VTC
- When creating the claim for secondary insurance from insurance payments screen use the balance field for the amount when the option is selected to submit the balance to 2nd insurance is on
- After modifying insurance plans expiry date and renewal date are recalculated for the individual patient insurance file

Flex Changes

- Option to add Subjective Questions asked at sign in added to current note in Flex
- Appointment time added to detailed patient queue (with Patient image option)
- Find patient no longer stalls when searching for names starting with "SIN"
- Patients listed in Find displayed alphabetically
- Pending SOAP notes checked when patient loaded via find

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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