

Helper 9.8.2 New Features

September 1, 2022

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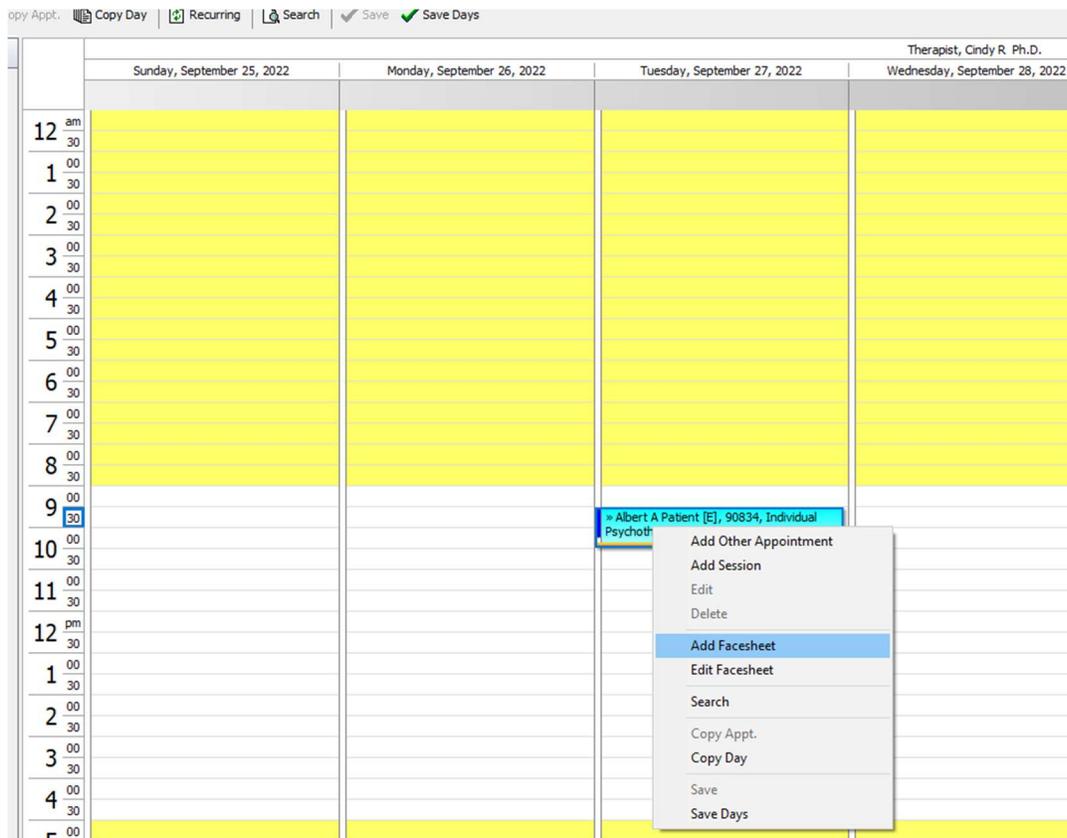
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Helper

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Add Facesheet options to Scheduler

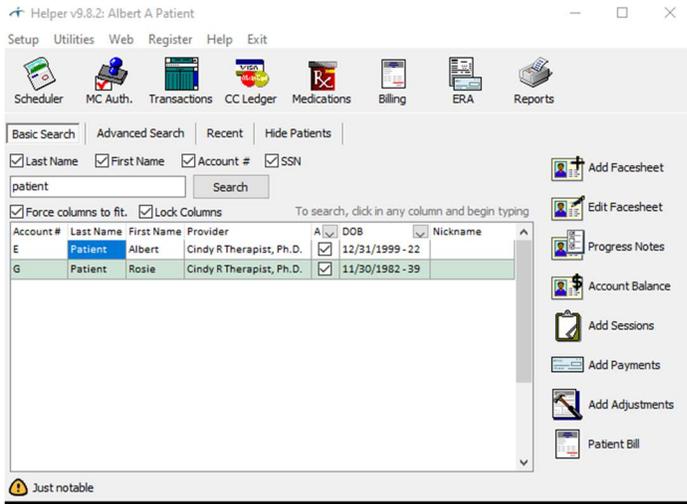


We have added Edit Patient Facesheet and Add Patient Facesheet menu options to the right-click menu in Scheduler. Selecting Edit Facesheet will take you to the Patient represented in the selected appointment.

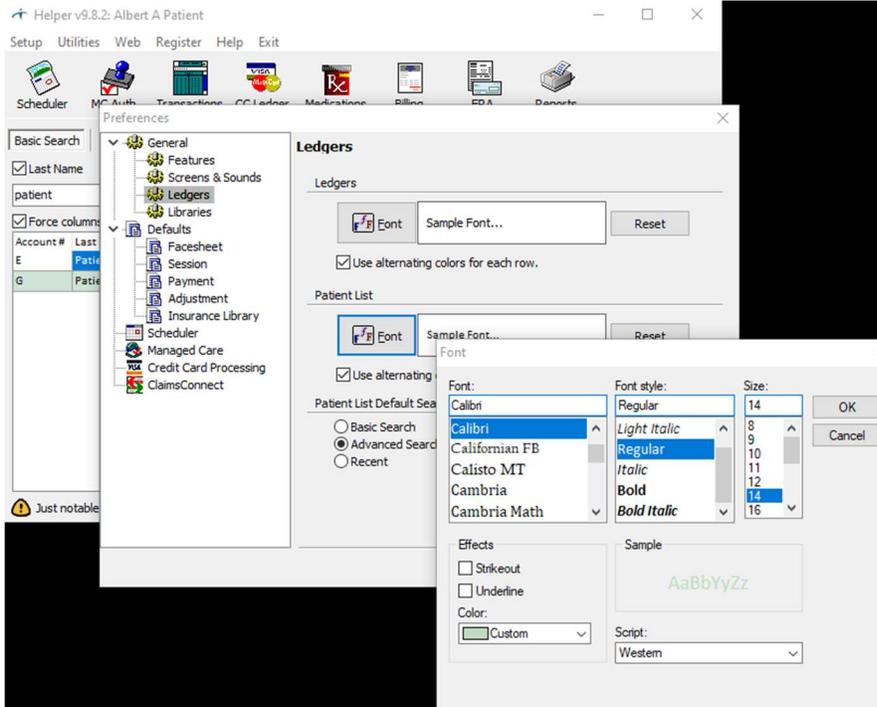
Flag Note Changes

Match Patient Flag Note font to Patient List font

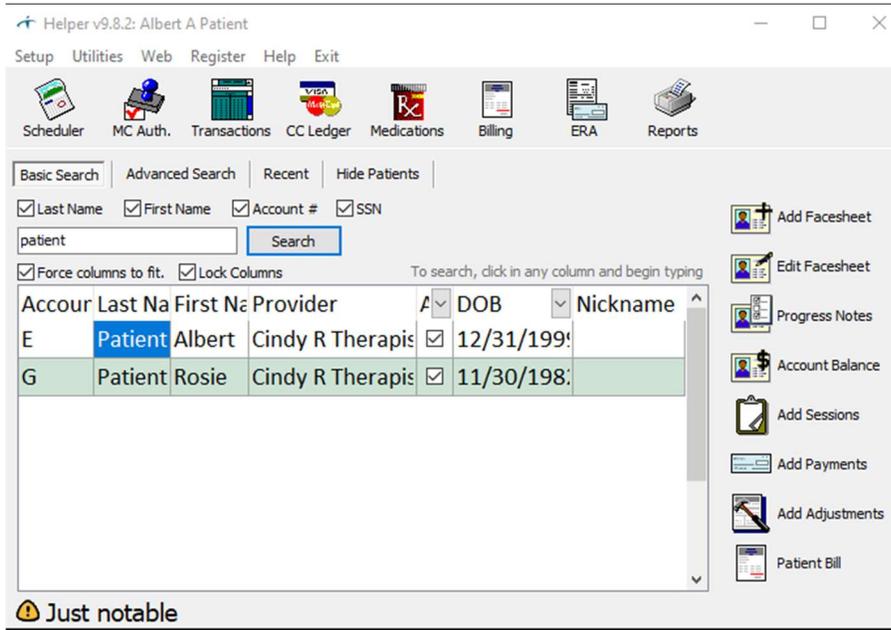
Note that the font used for the patient list is the same as the Patient Note below of “Just notable”



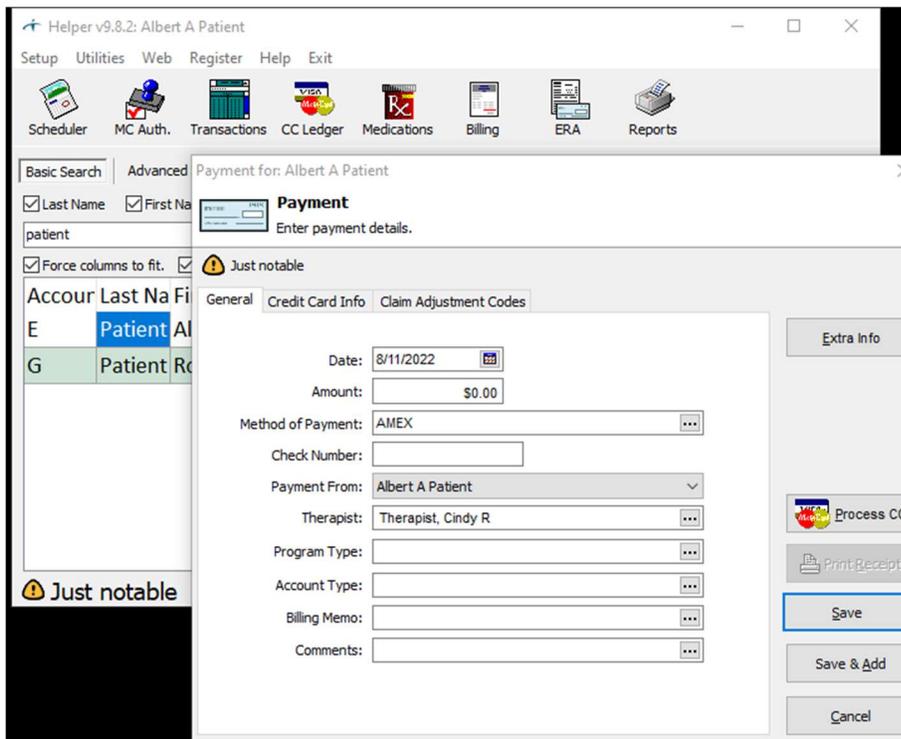
By changing the Patient List font to 14:



Both the Patient List and the Patient Note have increased to font size 14.



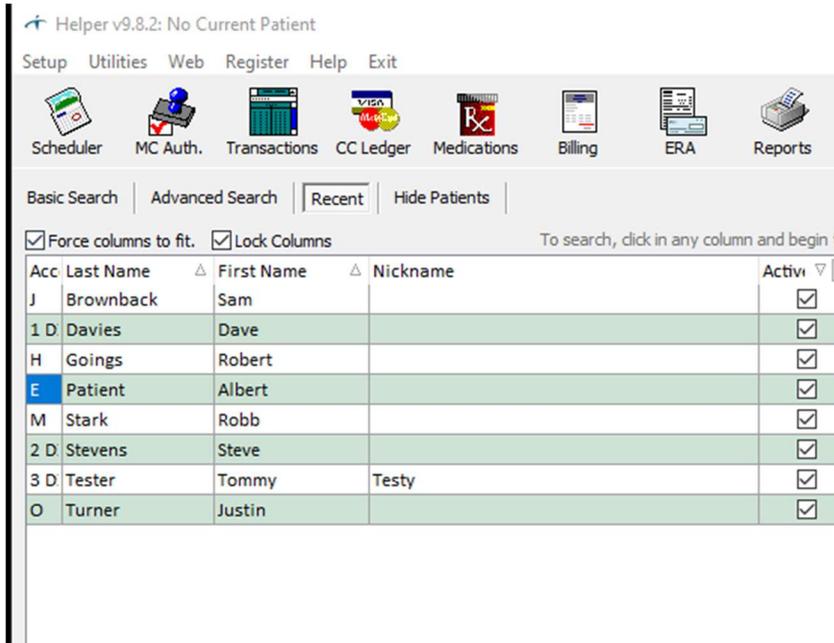
Add Patient Flag Note to the top of the Payment, Adjustment, and Add Appointment screens



When adding a Payment (above), Adjustment or Appointment, the Patient Note will now display at the top of the screen.

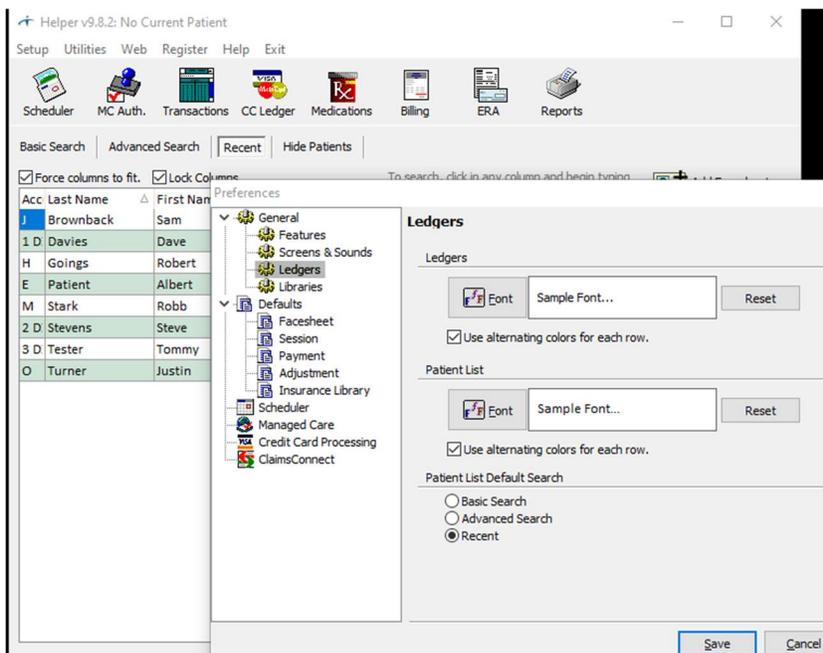
Create New Search based on Recently Viewed Patients

In addition to the Basic and Advanced Search menus in Helper, we have added a new menu that lists the previous eight patients that you have accessed in Helper. This should help users navigate quickly to a short list of Patients that users are actively using over a short period of time.



Each time the user accesses a different Patient not currently on the list, the Patient that was accessed the longest amount of time ago will fall from the list.

There is also a new option to make "Recent" your default Search menu choice on the Preferences page:



Add a multi-select list of CPT Codes to the “Select group of transaction” filter screen

This option is helpful in letting you narrow your reports to view only a specific CPT code or codes. It will only list the ACTIVE CPT codes you have in your service library. This option can also be used regardless of if “CPT Code” is a column option in report you are running.

For Example, if you want a Day Sheet report with just my 90834 & 90837 sessions for the year subtotaled by month all you must do is go into my Reports ledger to Transactions Summary | Day sheet

Once there you can go into “Select Group of Transactions”. When you do, you would go to the Sessions or Procedures tab and select the specific CPT code(s) you want to include and then click OK.

Select Transactions

Dates General Procedures

Select Procedures with the following

Procedure:

Procedure Status:

Diagnosis:

CPT codes:

- 90791
- 90830
- 90832
- 90834
- 90837
- 90846
- 90853

Clear OK Cancel

When you run the report, you would see only transactions that have a 90834 or 90837 CPT Code (shown below):

Apr, 2022

Date	Description	Patient	Diagnosis	CPT Code	Units	Amount
04/28/2022	Mtms by pharm, add	Alltransactions, Alan	F71,F31.13	90837	1	\$0.00
Sub Total						\$0.00

Jun, 2022

Date	Description	Patient	Diagnosis	CPT Code	Units	Amount
06/08/2022	Individual Psychothe	Bonamazza, Joe	F30.4	90834	1	\$80.00
Sub Total						\$80.00

Jul, 2022

Date	Description	Patient	Diagnosis	CPT Code	Units	Amount
07/07/2022	Individual Psychothe	Bonamazza, Joe	F30.4	90834	1	\$80.00
Sub Total						\$80.00

Highlight Scheduler Time Text when Time Slot is Highlighted

Since it is sometimes difficult to align the times near the left-hand margin with the time slot selected several columns over to the right, we have added a highlight to the corresponding time to make it more clear which time the user has selected.

	Sunday, August 7, 2022	Monday, August 8, 2022	Tuesday, August 9, 2022	Wednesday, August 10, 2022	Thursday, August 11, 2022
am					
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» Albert A Patient [E], 90834,
Individual Psychotherapy — Just
notable