Helper 9.8.2 New Features

September 1, 2022

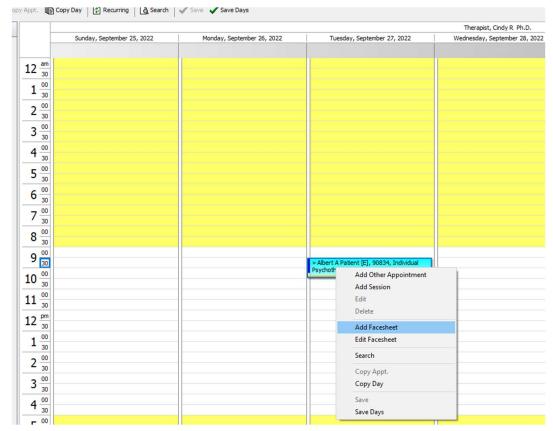
Table of Contents

Add Facesheet options to Scheduler	2
Flag Note Changes	
Match Patient Flag Note font to Patient List font	
Add Patient Flag Note to the top of the Payment, Adjustment, and Add Appointment screens	
Create New Search based on Recently Viewed Patients	5
Add a multi-select list of CPT Codes to the "Select group of transaction" filter screen	6
Highlight Scheduler Time Text when Time Slot is Highlighted	7



www.ntst.com

4950 College Boulevard Overland Park, KS 66211 800.343.5737 | Fax: 888.965.4021 myaccount@helper.com



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"

+ Helper	r v9.8.2: Alb	ert A Patie	nt						-		\times
Setup Ut	ilities We	b Regist	er Help	Exit							
Scheduler	MC Aut	n. Transa	ctions CC	Ledger Me	Redicatio	ins Billing	ERA	Repor	e ts		
Basic Searc	ch Adva	nced Search	Recen	t Hide Pat	ents	ĺ					
Last Nar	me 🗹 Fin	st Name	Account	# 🗹 SSN						Add Faceshe	et
patient			Sear	ch							
Force co	olumns to fit	. Lock (Columns	То	searc	h, dick in any	mn and begin t	yping	E 🛛 E	dit Faceshe	et
Account #	Last Name Patient	First Name Albert		erapist, Ph.D.	A V	DOB 12/31/1999	 Nickname	^		Progress Not	tes
G	Patient	Rosie		erapist, Ph.D.		11/30/1982					
									2 🖗 A	Account Bala	ince
									Â,	Add Session:	5
									A	Add Paymen	ts
									<u> </u>	Add Adjustm	ents
								•	P	atient Bill	
Just no	otable										

By changing the Patient List font to 14:

			- 🗆	\times	
Setup Utilities Web Register Help Exit					
Scheduler MC Auth Transactions CC Ladaer	Medications Billing	EDA Denorte		×	
Basic Search Image: Search Image: Last Name Image: Search patient Image: Search Image: Force columnt Image: Search Account # Last Image: Search Image: Patie Image: Patie Image: Patie Image: Patie	Use alternating color	e Font rs for each row.	Reset	_	
Adjustment	Patient List Default Sea Patient List Default Sea Recent	le Font	Font style: Regular A Light Italic Regular Italic Bold Bold Italic	Size: 14 8 9 10 11 12 16 v	OK Cancel
		Effects Strikeout Underline Color: Color: Custom		BbYyZz ~	

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

↔ Helper v9.8.2: Albert A Patient	- 🗆 ×
Setup Utilities Web Register Help Exit	
Scheduler MC Auth. Transactions CC Ledger Medications Billing ERA Reports	
Basic Search Advanced Search Recent Hide Patients	
□ Last Name □ First Name □ Account # □ SSN patient	Add Facesheet
Force columns to fit. Lock Columns To search, dick in any column and begin typing	Edit Facesheet
Accour Last Na First Na Provider Ary DOB Vickname	Progress Notes
E Patient Albert Cindy R Therapis 🗹 12/31/199!	
G Patient Rosie Cindy R Therapis ☑ 11/30/198:	Account Balance
	Add Sessions
	Add Payments
	Add Adjustments
×	Patient Bill
① Just notable	

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

						-		\times
Setup Utilities Web Register	Help Exit							
Scheduler MC Auth. Transaction	ons CC Ledger	Medications	Billing	ERA	(With Reports			
Basic Search Advanced Paymer	t for: Albert A Pat	ient						
Last Name First Na	Enter payment	t details.						
Force columns to fit. 🗹 🚺 Jus	st notable							
Accour Last Na Fi Genera	Credit Card Info	Claim Adjus	tment Codes					
E Patient Al							1	Extra Info
G Patient Ro	Date:	8/11/2022						
	Amount:		\$0.00					
M	lethod of Payment:				•••			
	Check Number:							
	Payment From:	Albert A Pat	ient		~			•
	Therapist:	Therapist, C	Cindy R		•••		Maria .	Process C
	Program Type:				•••		A	
Just notable	Account Type:				•••			
	Billing Memo:							<u>S</u> ave
	Comments:				•••		S	ave & <u>A</u> dd
								<u>C</u> ancel

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.

ήŀ	Helper v9.8.2: No Cu	urrent Patient				
Setup	o Utilities Web	Register Help	Exit			
Sche	eduler MC Auth.		edger Medications	Billing	ERA I	(Seports
		d Search Recent	Hide Patients			
	orce columns to fit.		Let av	To search, di	ck in any column	
	Last Name 🛛	First Name	Nickname			Active ∇
J	Brownback	Sam				
1 D.	Davies	Dave				
H	Goings	Robert				\checkmark
E	Patient	Albert				
М	Stark	Robb				
2 D.	Stevens	Steve				
3 D.	Tester	Tommy	Testy			
0	Turner	Justin				

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:

		_	
Scheduler MC Auth.	Transactions CC Ledger Medications	Billing ERA Reports	
Force columns to fit.	d Search Recent Hide Patients Clock Columne First Nan Preferences Sam \ \ \ Columna General	To search, click in any column and begin typing for the com	· · · · >
1 D Davies H Goings E Patient M Stark 2 D Stevens	Jave Image: Constraint of the sector of th	Ledgers	Reset
0 Turner	Justin	Patient List Font Sample Font Use alternating colors for each row. Patient List Default Search Basic Search Advanced Search Recent	Reset
		Sa	ve <u>C</u> ancel

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.

rt Se	lect Trans	actions		×
Dates	General	Procedures		
	Select	t Procedures wit	h the following	
		Procedure:		
	Pro	cedure Status:		
		Diagnosis:		
		CPT codes:	90791 90830 90832 90834 90837 90846 90853	
				Clear
				<u>о</u> к
				 <u>C</u> ancel

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
04/28/20	022 Mtms by pharm, add	Alltransactions, Alan	F71,F31.13	90837	1	\$0.00
Sub Tol	tal					\$0.00
Jun, 2	022					
Date	Description	Patient	Diagnosis	CPT Code	Units	Amount
06/08/20	022 Individual Psychothe	Bonamazza, Joe	F30.4	90834	1	\$80.00
Sub Tot	tal					\$80.00
J u l, 20	22					
Date	Description	Patient	Diagnosis	CPT Code	Units	Amount
07/07/20	022 Individual Psychothe	Bonamazza, Joe	F30.4	90834	1	\$80.00
Sub Tot	tal					\$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.

