



# Helper 9.8 New Features

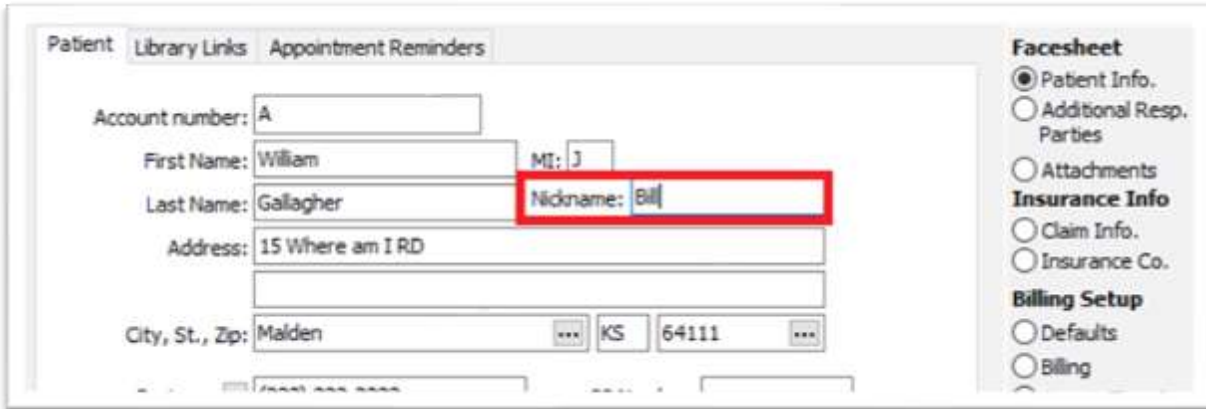
## Table of Contents

Nickname on Facesheet .....	2
Removed Ability to Create Session for Inactive Patients .....	4
Ability to Exclude Inactive Responsible Parties on Reports .....	4
Single ERA Processing .....	4
Save Prompt on Progress Notes .....	4
Ability to Lock Ledger Screens .....	5
Added Default Payment Method on Facesheet .....	6
Claim Settings Overrides: Insurance ID Column .....	6
Ability to Select Basic or Advanced Search.....	7
Archive Date for Insurance Company on Facesheet .....	8
Simplified: Move a Batch of Charges.....	8



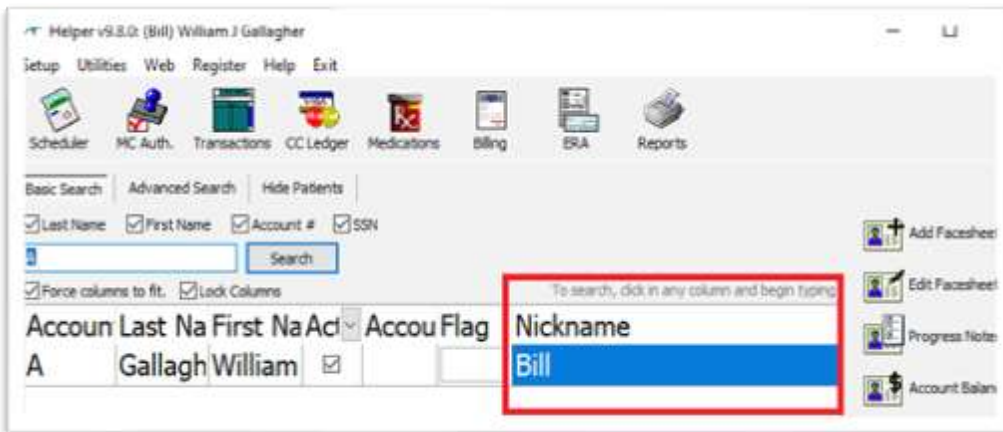
## Nickname on Facesheet

A new Nickname field was added to the facesheet, as shown below.



The screenshot shows a patient's facesheet form. The form includes fields for Account number (A), First Name (William), MI (J), Last Name (Gallagher), Address (15 Where am I RD), and City, St., Zip (Malden, KS, 64111). A new field labeled "Nickname" with the value "Bill" is highlighted with a red box. On the right side, there are sections for "Facesheet" (Patient Info, Additional Resp. Parties, Attachments), "Insurance Info" (Claim Info, Insurance Co.), and "Billing Setup" (Defaults, Billing).

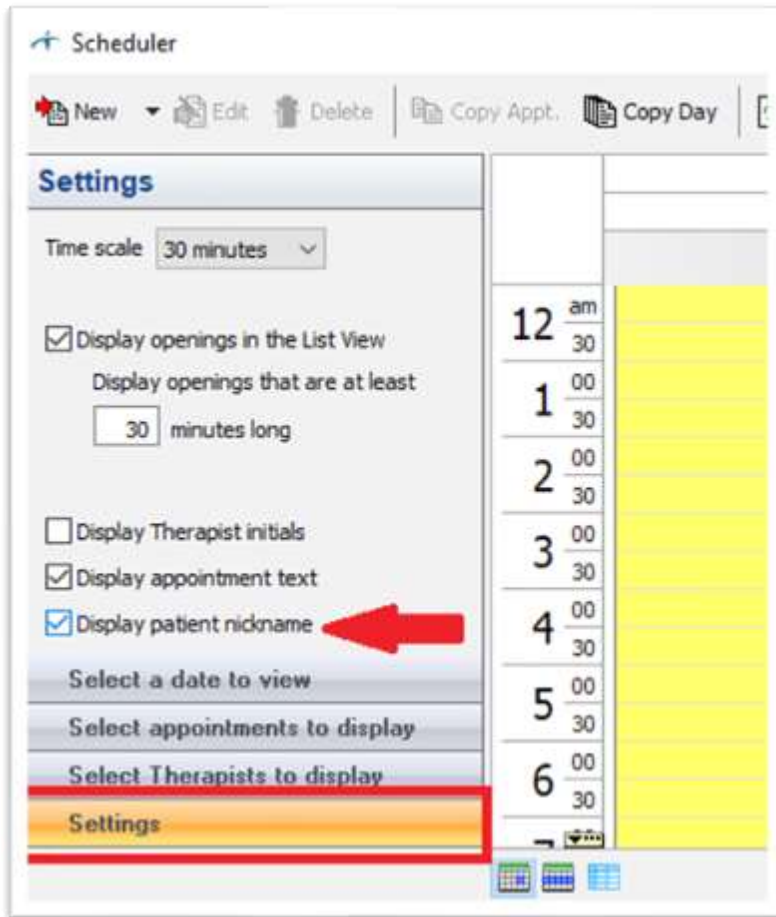
On the patient list screen, it will show as:



The screenshot shows the patient list screen in the software. The table displays patient information, and the "Nickname" column is highlighted with a red box. The table has columns for Account, Last Name, First Name, Account #, Account Flag, and Nickname. The first row shows Account A, Last Name Gallagher, First Name William, and Nickname Bill.

Account	Last Name	First Name	Account #	Account Flag	Nickname
A	Gallagher	William			Bill

To add the Nickname to the scheduler, open the **scheduler** and click on **Settings** on the bottom left. Then check the box to **Display patient nickname**.



When an appointment is created, the Nickname will be displayed at the beginning of the appointment.



## Removed Ability to Create Session for Inactive Patients

If a patient is inactive, when attempting to add a session from the main screen, transaction ledger, or scheduler, a dialog will show stating that the patient is inactive, and a session cannot be added.

## Ability to Exclude Inactive Responsible Parties on Reports

Under the Billable Parties section in Select groups of patients, you can now deselect the inactive responsible party.



The screenshot shows a dialog box titled "Billing Parties" with tabs for "Billing" and "Library Links". Below the tabs, it says "Use the following selection crit". There are two sections: "Billable parties" and "Patient Status".

**Billable parties**

- Patient
- Responsible Party #1
- Responsible Party #2
- Inactive Responsible parties
- Primary Ins.
- Secondary Ins.
- Inactive Ins.

**Patient Status**

- Active patients
- Inactive patients
- Both inactive and active

## Single ERA Processing

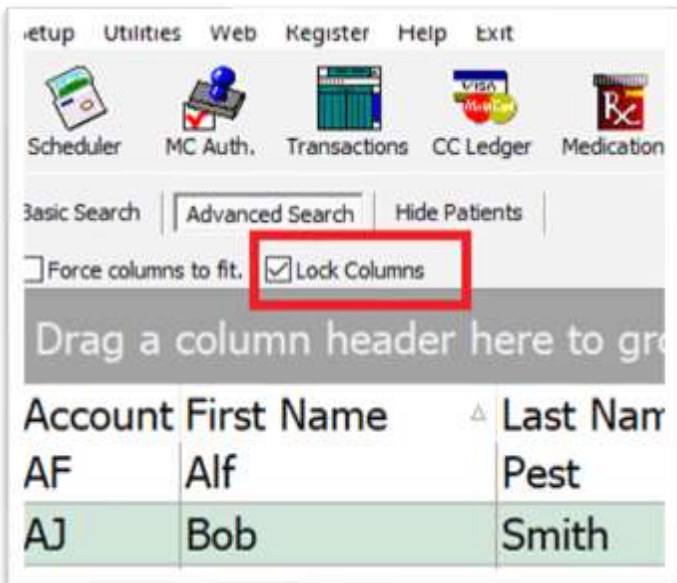
You can now process a single ERA and the ERA screen will not close.

## Save Prompt on Progress Notes

When you close a Progress Note, you will be prompted save the note before closing.

## Ability to Lock Ledger Screens

This new checkbox will allow you to lock the screen view. It will prevent the view from being changed accidentally. On the patient list screen, the option is just under the Advanced Search option, as shown below.



On the Transaction ledger it will be on the bottom left.



## Added Default Payment Method on Facesheet

This will allow you to specify by patient and/or responsible party's default payment method.

Edit the client facesheet. On the right side, go to **Defaults** then select the tab labeled **Payments** Click the 3-dot ellipsis for payment type and choose the payment type.

General Session **Payments** Adjustment ERA

The information here is copied into every new payment. This helps speed data entry of payments.

Method of Payment [ ] ...

Responsible Party Gallagher, William ✓

**Facesheet**

- Patient Info.
- Additional Resp. Parties
- Attachments
- Insurance Info**
- Claim Info.
- Insurance Co.
- Billing Setup**
- Defaults
- Billing
- Access Time & Customer

## Claim Settings Overrides: Insurance ID Column

When you add an override in the therapist claim setting, it will now display the insurance company ID. This will allow you to know which insurance company has been added when there are multiple insurance companies with the same number.

ID	Status	Company Name	Address 1	Address2	City	St	Zip Code
A	■	Blue Cross Blue Shi	P.O. Box		Kan	MO	64141
	■	Empire					
	■	Medicare					
	■	Medicare of KS	P.O. Box		Mar	WI	53707

Therapist: Newman, Chris

Insurance: Blue Cross Blue Shield of Kansas City ...

**Insurance ID: A**

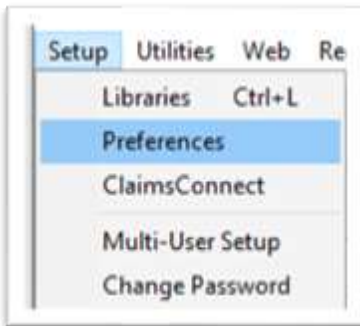
Entity Type:  Person  
 Non-Person Entity

Facility: [ ] ...

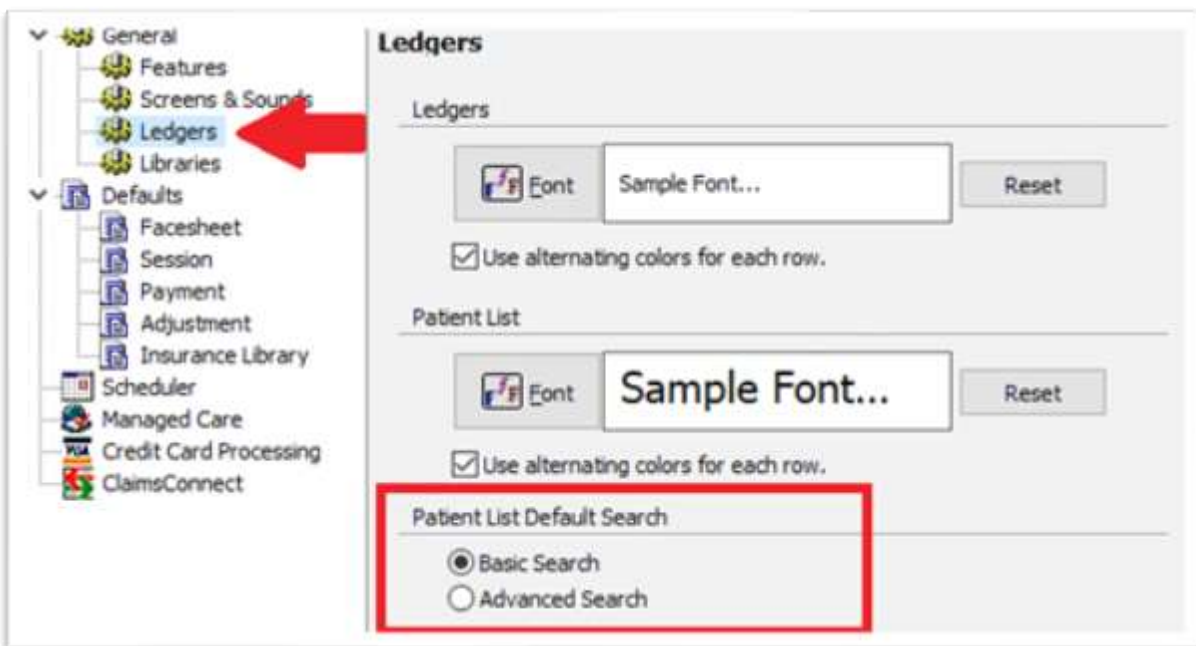
Pay-To Provider:  Use the Provider as the Pay-to Provider (loop 2010AB)

## Ability to Select Basic or Advanced Search

When Helper is launched, you now have the ability to set Basic or Advanced Search. Click on **Setup** at the top left of the Helper screen, then select **Preferences**.



On the **Preferences** screen, select **Ledgers**. At the bottom of this screen, choose **Basic** or **Advanced Search**.





## Archive Date for Insurance Company on Facesheet

When archiving and insurance company in a facesheet, it will now include the archive date.

Mark the highlighted Insurance Policy Holder as

Status	First Name	Last Name	Insurance Company	Inactivated On
Primary	Rob	Gallagher	Medicare of KS	
Inactive	William	Gallagher	Medicare of KS	11/17/2021 08:25 AM

## Simplified: Move a Batch of Charges

When moving sessions back to Ready to Send using the **Move a Batch of Charges**, you can now select a range of charges to move. In the Billing Ledger, select the **Move a Batch of Charges** button.

View History  Display for current patient only.

Submit Claims Electronically

Ready to Send

**Balance Due** 0.00  Move all paid charges to 'Closed'  **Move a Batch of Charges**

Date	Patient	Billable Party	Service	Method	Total Bill
------	---------	----------------	---------	--------	------------

Click **Next** the following screen.

**ABOUT MOVING CHARGES**

Charges normally move only in one direction: From Ready to Send, to Sent, and then to Closed. The charges move automatically when you bill for them. However, in some situations you need to move charges manually. You might even reverse the normal direction. For example:

- Re-sending** a batch of claims that was not received by the insurance company (from Sent to Ready to Send)
- Reprinting** claims after a print job error, or resending electronic claims after a transmission failure (Sent to Ready to Send)
- Closing** out secondary insurance claims that will not be paid (Ready to Send to Sent or Closed)


Now, select **Add to Ready to Send**, then click the **Next** button.

Choose an action to move charges from their **current ledger tab** to your chosen **destination tab**.

Move Action


Move **from Ready to Send to Sent or Closed**

**Add to Ready to Send from Sent or Closed**




Choose a batch date and click it to highlight. You can check the Batch ID# against the Batch ID# in the Billing Ledger. The next screen allows you to move all or some of the charges in this batch.

Batch Date	Method	Batch #
12/4/2015	Batch Move To Sent/Closed	2
12/4/2015	Batch Move To Sent/Closed	3
1/29/2016	Batch Move To Sent/Closed	12



On the following screen, **highlight the first date you need to move**, then hold down the **space bar** until it reaches the last date you need to move. Be careful it will move quickly. Then, click on **Close** and follow the prompts to finish the utility.

	Date	Patient	Billable Party	Service	Method
<input type="checkbox"/>	9/13/2018		William J Gallagher	Psytx cr...	None
<input type="checkbox"/>	9/13/2018	William ...	(Inactive Ins) Empire	Psytx cr...	None
<input type="checkbox"/>	9/17/2018	William ...	William J Gallagher	Individu...	None
<input type="checkbox"/>	9/18/2018	William ...	William J Gallagher	Psychol...	None
<input type="checkbox"/>	9/18/2018	William ...	(Inactive Ins) Empire	Psychol...	None
<input type="checkbox"/>	3/25/2019	William ...	(Inactive Ins) Empire	Individu...	None
<input type="checkbox"/>	4/19/2019	DX Check	DX Check	Psychol...	None
<input type="checkbox"/>	4/22/2019	DX Check	DX Check	Psychol...	None
<input checked="" type="checkbox"/>	4/23/2019	DX Check	DX Check	Psychol...	None
<input checked="" type="checkbox"/>	4/24/2019	DX Check	DX Check	Psychol...	None
<input checked="" type="checkbox"/>	4/25/2019	DX Check	DX Check	Psychol...	None
<input checked="" type="checkbox"/>	4/26/2019	William ...	(Inactive Ins) Empire	Individu...	None
<input checked="" type="checkbox"/>	6/7/2019	William ...	(Inactive Ins) Blue Cross Blue Shield of	Individu...	None