Helper 9.8 New Features

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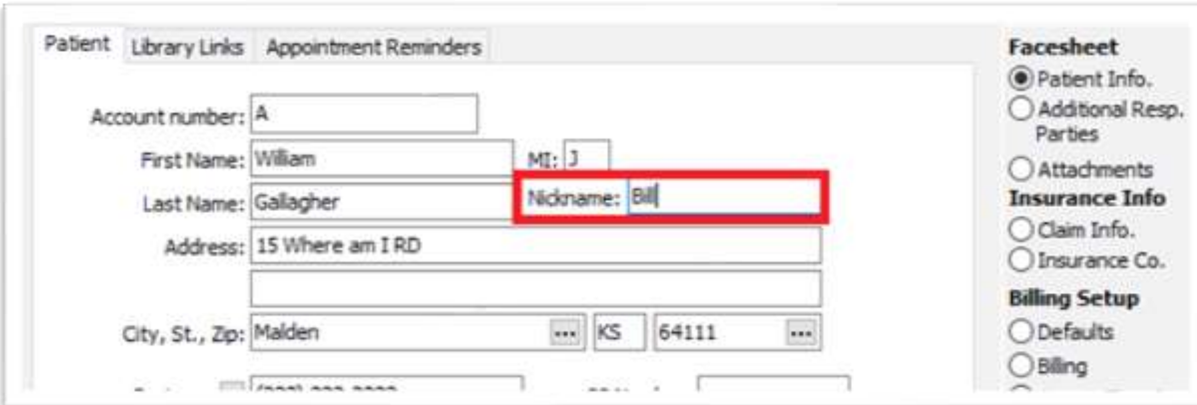
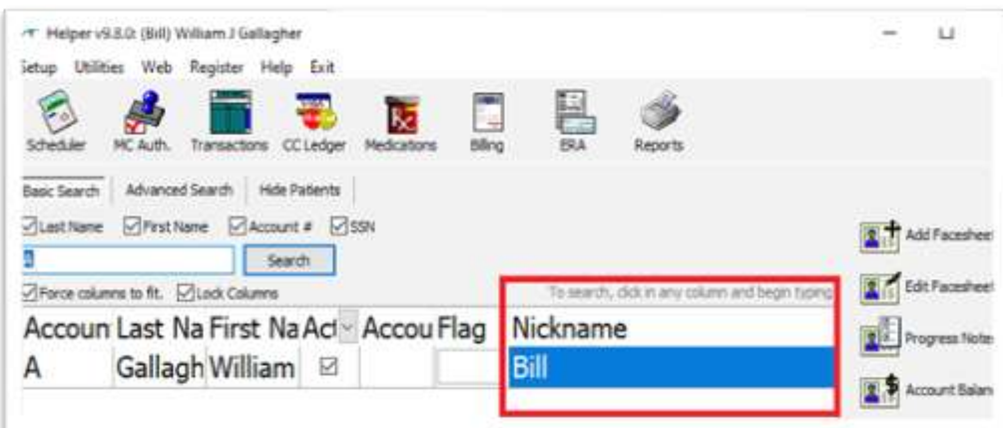
Nickname on Facesheet

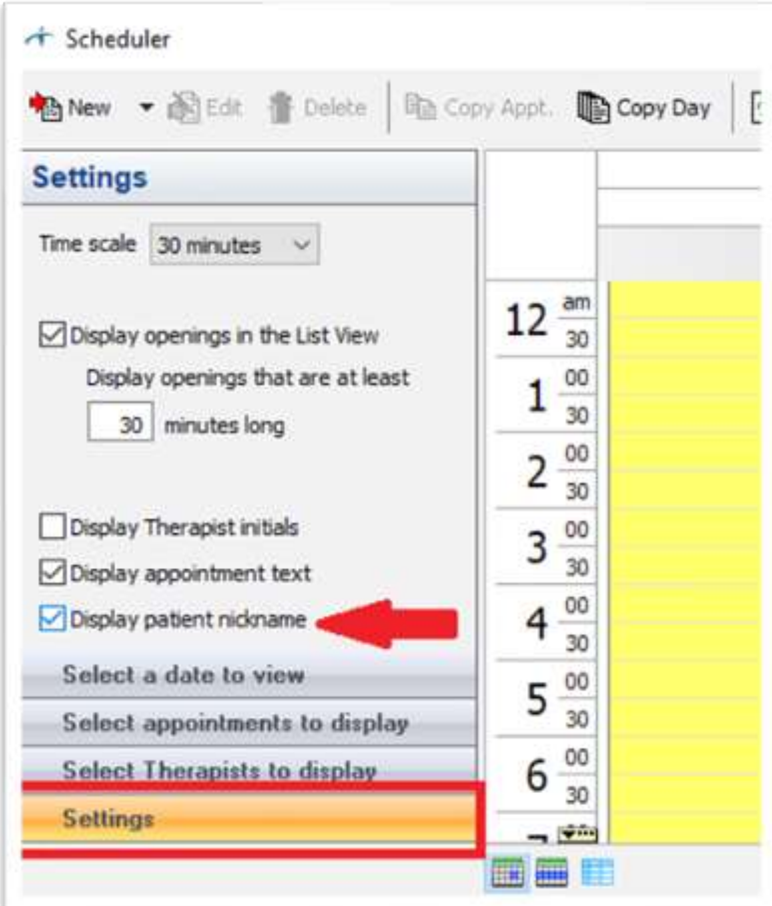
A new Nickname field was added to the facesheet, as shown below.



On the patient list screen, it will show as:



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.

Single ERA Processing

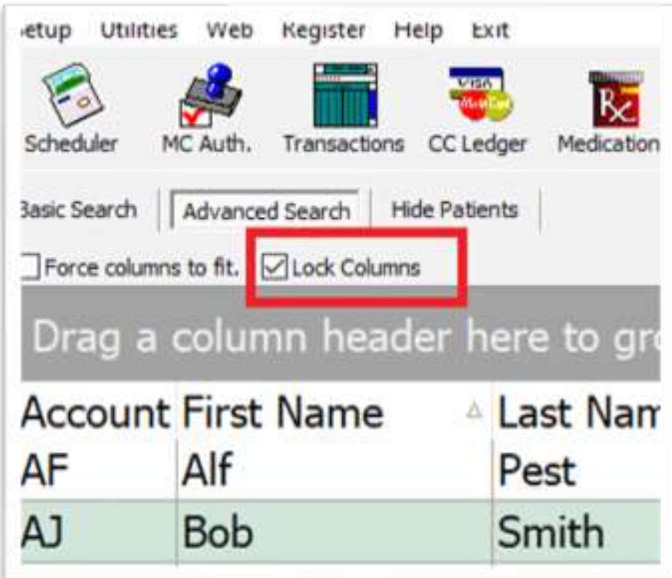
You can now process a single ERA and the ERA screen will not close.

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.

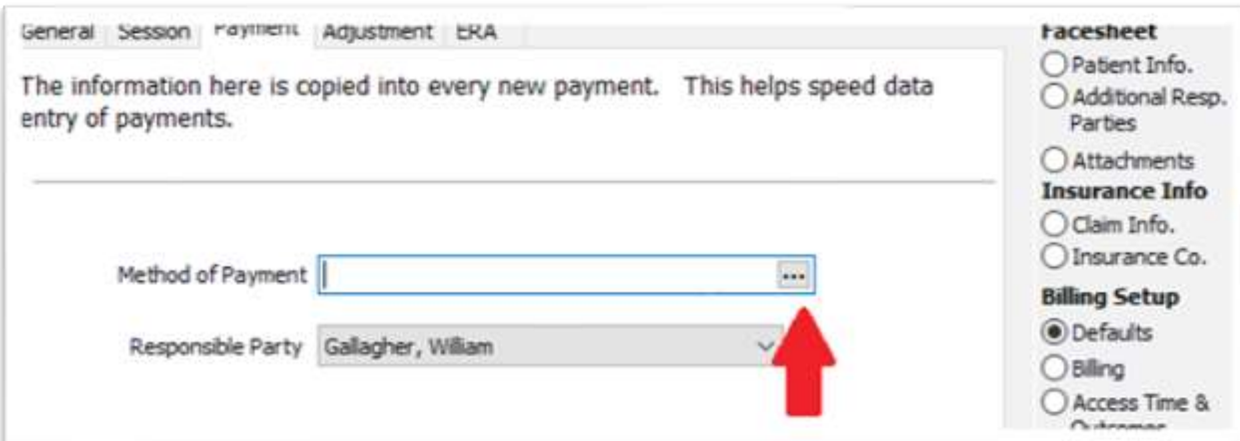


On the Transaction ledger it will be on the bottom left.

Added Default Payment Method on Facesheet

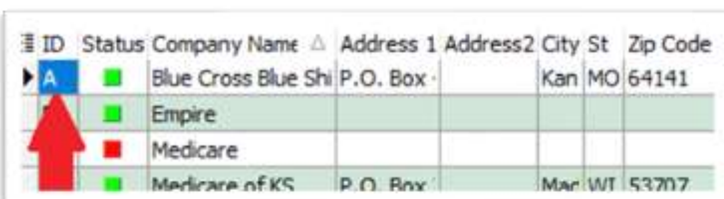
This will allow you to specify by patient and/or responsible party's default payment method.

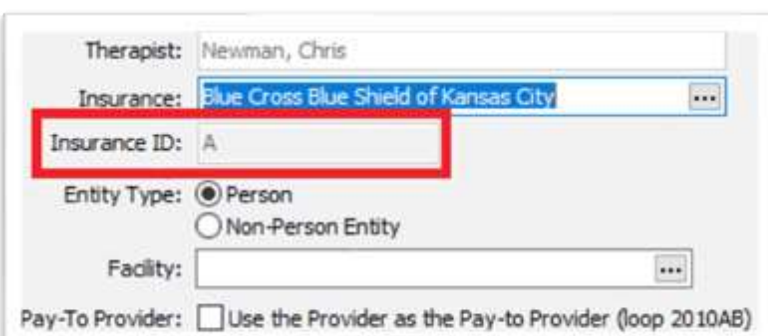
Edit the client facesheet. On the right side, go to **Defaults** then select the tab labeled **Payments** Click the 3-dot ellipsis for payment type and choose the payment type.



Claim Settings Overrides: Insurance ID Column

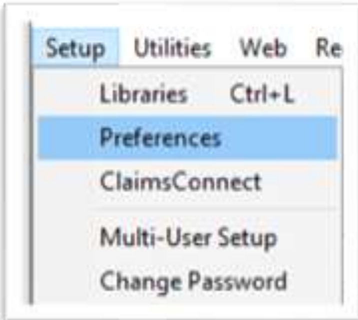
When you add an override in the therapist claim setting, it will now display the insurance company ID. This will allow you to know which insurance company has been added when there are multiple insurance companies with the same number.



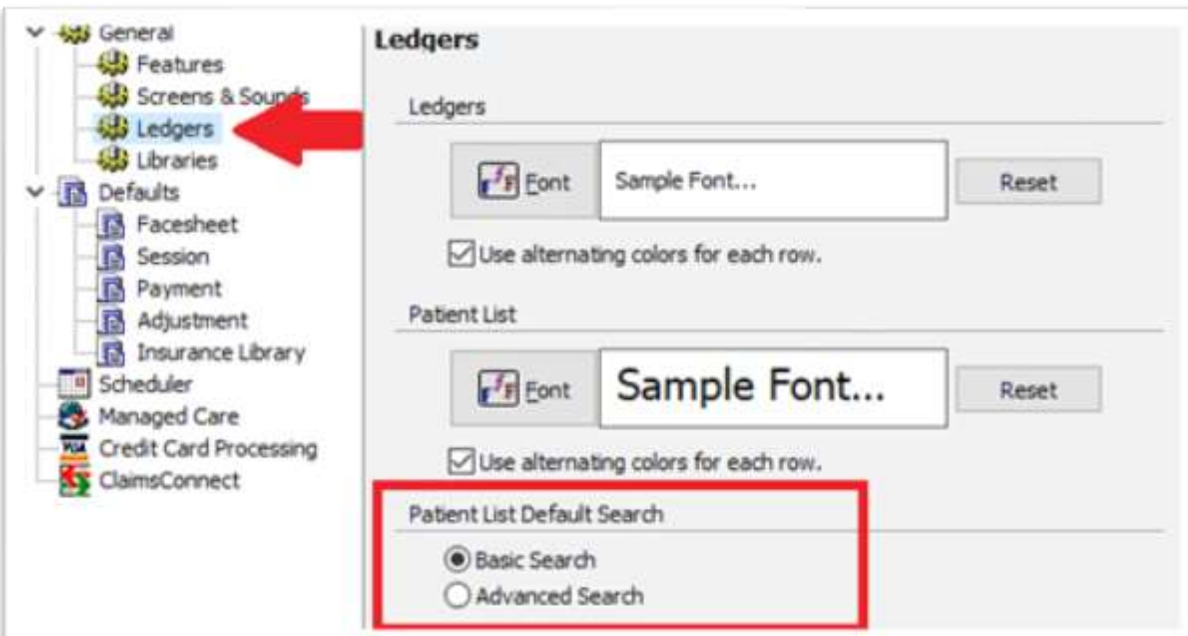


Ability to Select Basic or Advanced Search

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**.

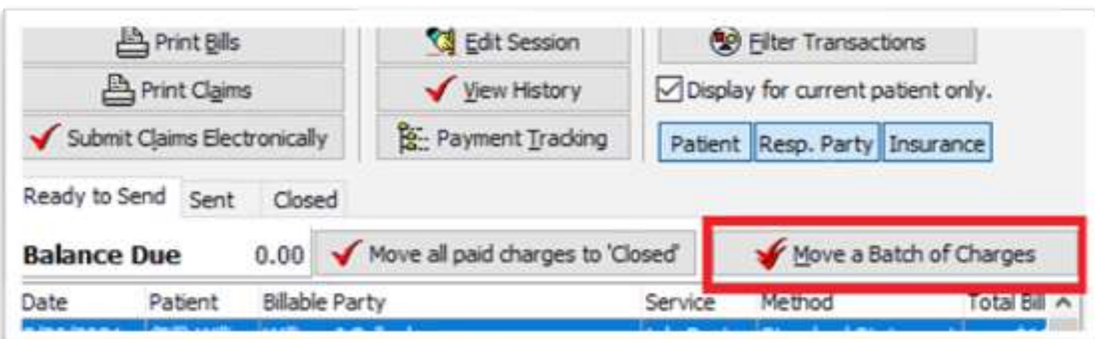


Archive Date for Insurance Company on Facesheet

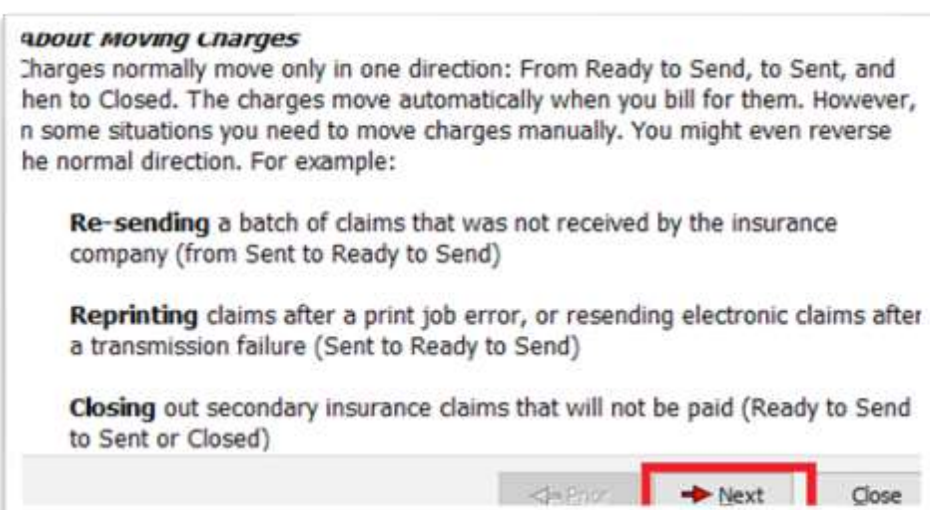
When archiving and insurance company in a facesheet, it will now include the archive date.

Simplified: Move a Batch of Charges

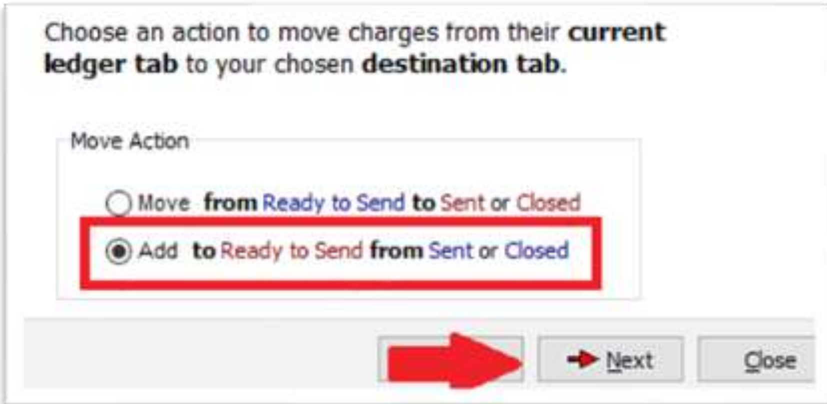
When moving sessions back to Ready to Send using the **Move a Batch of Charges**, you can now select a range of charges to move. In the Billing Ledger, select the **Move a Batch of Charges** button.

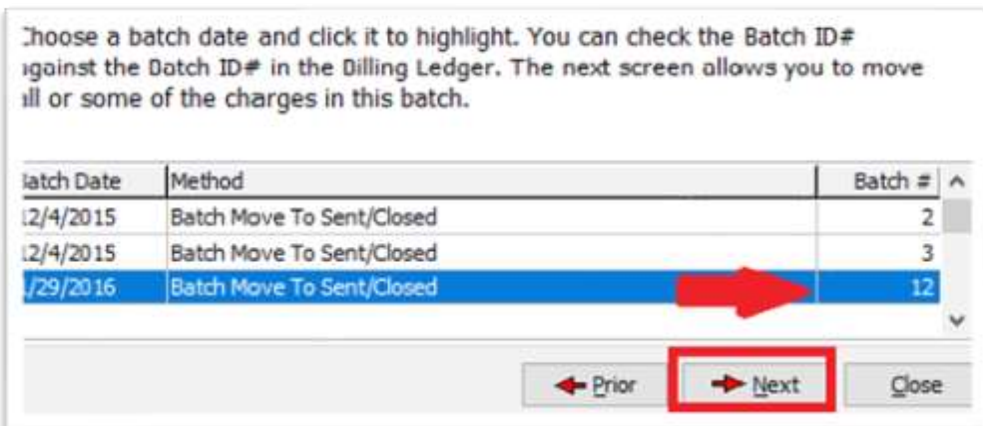


Click **Next** the following screen.



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





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. <u>Be careful it will move quickly</u>. Then, click on **Close** and follow the prompts to finish the utility.