

Medisoft Features Evolution Matrix

| Accounting/Billing | v11 | v12 | v14 | v15 |
|---|-----|-----|-----|-----|
| Customized Aging Buckets | ✓ | ✓ | ✓ | ✓ |
| Withhold Code Type for Procedure Codes | ✓ | ✓ | ✓ | ✓ |
| Automatic Rebill for Claims | ✓ | ✓ | ✓ | ✓ |
| Serialized Superbills | ✓ | ✓ | ✓ | ✓ |
| Multi-link Treatment Plans | ✓ | ✓ | ✓ | ✓ |
| Deactivate Codes | ✓ | ✓ | ✓ | ✓ |
| Color-coding Transactions and Quick Ledger | ✓ | ✓ | ✓ | ✓ |
| Dunning Messages for Statements | ✓ | ✓ | ✓ | ✓ |
| Statement Management | ✓ | ✓ | ✓ | ✓ |
| Cycle Billing | ✓ | ✓ | ✓ | ✓ |
| Rules-based Collection Assignments | ✓ | ✓ | ✓ | ✓ |
| Actionable Collection Worklist | ✓ | ✓ | ✓ | ✓ |
| Task or Date-driven Collection Workflow | ✓ | ✓ | ✓ | ✓ |
| On-demand Collection Letters | ✓ | ✓ | ✓ | ✓ |
| Insurance Groupings for Reporting and Analysis | ✓ | ✓ | ✓ | ✓ |
| Automatic Recalculation of Patient Remainder Balance | ✓ | ✓ | ✓ | ✓ |
| Automatic Small Balance Write-offs | ✓ | ✓ | ✓ | ✓ |
| Remittance Tracking for Secondary Claims | ✓ | ✓ | ✓ | ✓ |
| Integrated Electronic Eligibility Checking | ✓ | ✓ | ✓ | ✓ |
| Missed Co-pay Tracking | | ✓ | ✓ | ✓ |
| Unprocessed Transactions (Holding Tank) | | ✓ | ✓ | ✓ |
| Aging View in Transaction Entry | | ✓ | ✓ | ✓ |
| UB-04 Paper and Print Image | | | ✓ | ✓ |
| Custom Dates on ERA Posting | | | ✓ | ✓ |
| Global Days (surgical billing) | | | ✓ | ✓ |
| Billing for 8 Diagnosis Codes | | | ✓ | ✓ |
| Missed Co-pay Remainder Statement | | | | ✓ |
| Small Balance Write-off by Statement Submission Count | | | | ✓ |
| Statement Manager Remainder Balance Display | | | | ✓ |
| Collection List Link to Quick Ledger | | | | ✓ |
| Deposit List Detail Print | | | | ✓ |

| Usability | v11 | v12 | v14 | v15 |
|---|-----|-----|-----|-----|
| Set Default Data Fields | | ✓ | ✓ | ✓ |
| Customizable Tool Bar | | ✓ | ✓ | ✓ |
| Option to Display Subtotals | ✓ | ✓ | ✓ | ✓ |
| Customized Data Screens | ✓ | ✓ | ✓ | ✓ |
| Warning on Duplicate Patient | ✓ | ✓ | ✓ | ✓ |
| Auto Tax Entry | ✓ | ✓ | ✓ | ✓ |
| Streamlined Transaction Entry | ✓ | ✓ | ✓ | ✓ |
| Field Data Checking | ✓ | ✓ | ✓ | ✓ |
| Patient Flagging | ✓ | ✓ | ✓ | ✓ |
| Show Remainder When Applying Payments | ✓ | ✓ | ✓ | ✓ |
| Apply to Oldest When Applying Payments | ✓ | ✓ | ✓ | ✓ |
| Select Multiple Claims to Print or Reprint | ✓ | ✓ | ✓ | ✓ |
| Enter Payments Directly from Office Hours Professional | ✓ | ✓ | ✓ | ✓ |
| One-click to Change Responsibility for Transactions | ✓ | ✓ | ✓ | ✓ |
| Streamlined Quick Ledger View | ✓ | ✓ | ✓ | ✓ |
| Rules-based Worklist for Daily Office Tasks | ✓ | ✓ | ✓ | ✓ |
| Copy, Edit, Add New Case Directly from Office Hours Professional | | ✓ | ✓ | ✓ |
| Reschedule Status in Office Hours Professional | ✓ | ✓ | ✓ | ✓ |
| Audit Generator with Chart Number Filtering | ✓ | ✓ | ✓ | ✓ |
| Patient Quick Entry | | ✓ | ✓ | ✓ |
| Multi-practice Conversion | | | ✓ | ✓ |
| Scheduled File Maintenance | | | ✓ | ✓ |
| Dashboard - Warnings | | | ✓ | ✓ |
| Dashboard - Logged-in Users Utility | | | ✓ | ✓ |
| Last Selected Chart Number Hot-key | | | | ✓ |
| Default Printer Option for Custom Reports | | | | ✓ |
| Transaction Entry Sortable Grids | | | | ✓ |
| Customizable Transaction Sort on Patient Statements | | | | ✓ |
| Edit/Enter Patient Notes from Quick Ledger | | | | ✓ |
| Claim Management Sorting Save | | | | ✓ |

| Reporting | v11 | v12 | v14 | v15 |
|--|-----|-----|-----|-----|
| Facility Report | ✓ | ✓ | ✓ | ✓ |
| Quick Receipt and Quick Statement | ✓ | ✓ | ✓ | ✓ |
| Patient Collections Reports | ✓ | ✓ | ✓ | ✓ |
| Insurance Collections Reports | ✓ | ✓ | ✓ | ✓ |
| Unapplied Co-payment Report | ✓ | ✓ | ✓ | ✓ |
| View and Print All Future Appointments for Patients | ✓ | ✓ | ✓ | ✓ |
| Export to Microsoft® Excel | ✓ | ✓ | ✓ | ✓ |
| Standard Patient by Insurance Report | | ✓ | ✓ | ✓ |
| Standard Patient by Diagnosis Report | | ✓ | ✓ | ✓ |
| Standard Patient by Procedure Report | | ✓ | ✓ | ✓ |
| Case Billing Code Filter on Standard Reports | | ✓ | ✓ | ✓ |
| Dashboard - Totals | | | ✓ | ✓ |
| Dashboard - Trending | | | ✓ | ✓ |
| Medisoft Reports (formerly Focus Reports Standard) - Includes reports previously available in Medisoft plus more than 200 additional reports | | | | ✓ |
| Scheduled Report Generator | | | | ✓ |
| E-mailed Reports | | | | ✓ |
| File Maintenance Progress Reporting | | | | ✓ |
| Blank Appointment Indicator | | | | ✓ |
| Print Blank Superbills | | | | ✓ |
| Security/HIPAA | v11 | v12 | v14 | v15 |
| 5 Levels of Permissions and Security | ✓ | ✓ | ✓ | ✓ |
| Print Permissions Grid | ✓ | ✓ | ✓ | ✓ |
| Auto Log-off | ✓ | ✓ | ✓ | ✓ |
| Warning on Unapproved Codes | ✓ | ✓ | ✓ | ✓ |
| Unique Identifier Fields | ✓ | ✓ | ✓ | ✓ |
| Security Permissions on Reports | ✓ | ✓ | ✓ | ✓ |
| ANSI Standard Electronic Claims | ✓ | ✓ | ✓ | ✓ |
| HIPAA Security Ready | ✓ | ✓ | ✓ | ✓ |
| Rules-based Password Management | ✓ | ✓ | ✓ | ✓ |
| User Access History Reporting | ✓ | ✓ | ✓ | ✓ |
| Multi-level Trigger Management | ✓ | ✓ | ✓ | ✓ |
| Global Security | | ✓ | ✓ | ✓ |
| Security Added to MediUtils | | ✓ | ✓ | ✓ |

| Special Features | v11 | v12 | v14 | v15 |
|--|-----|-----|-----|-----|
| Office Messenger | ✓ | ✓ | ✓ | ✓ |
| Multimedia File Storage | ✓ | ✓ | ✓ | ✓ |
| Online Updates | ✓ | ✓ | ✓ | ✓ |
| Encoder Pro | ✓ | ✓ | ✓ | ✓ |
| Integrates with Microsoft Excel | ✓ | ✓ | ✓ | ✓ |
| Interfaces with Lab Systems | ✓ | ✓ | ✓ | ✓ |
| Patient Archiving | ✓ | ✓ | ✓ | ✓ |
| Workflow Administrator | ✓ | ✓ | ✓ | ✓ |
| Data Collaboration | ✓ | ✓ | ✓ | ✓ |
| Standard Integrated Word Processor | ✓ | ✓ | ✓ | ✓ |
| Standard Chart Number Change Utility | | ✓ | ✓ | ✓ |
| HL7 Interface | | ✓ | ✓ | ✓ |
| Integrated Dashboard | | ✓ | ✓ | ✓ |
| Data Export/Import | | | ✓ | ✓ |
| Future Appointment Warning | | | | ✓ |
| Phone Number Fields in Appointment Entry | | | | ✓ |



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