



**EMO (Electronic Medical Office)**



**Automated  
Link With,  
Fax & Emails**



**Rx Management Module**



**Click2Call and  
Voicemails in IMS**

# Release Notes

IMS Build 21 to IMS Build 22

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# Introduction

This release notes document contains a list of all the bug fixes and enhancements that were carried out for IMS Build 22.

## Legend:



EMR  
Enhancement



EMR  
Bug Fix



Billing  
Enhancement



Billing  
Bug Fix

## Example:



55133 [669406]

Internal bug ID

External case ID/ticket number

## Key Features



14872

In IMS, you can now view the clinic's employee schedules on the **Staff Schedule** screen of the IMS Staff Management module.

With the IMS Staff Management module, you can perform the following:

- View and customize the schedule of employees according to their job title, office, and office group.
- Switch the layout of the **Staff Schedule** screen between daily or weekly view.
- Estimate the number of staff required to work during a specific date in the **Staff Scheduling Calculator** window. In **Staff Scheduling Calculator**, the system analyzes the number of checked-in patients in past or future appointments of the clinic or the expected number of patients to calculate the required staff.
- Add break-hour types such as lunch and other types of breaks for each staff member.
- Analyze the total work hours of an employee, whether daily or weekly, to know if they worked overtime.

To know more about the IMS Staff Management module, see *Employee Schedule User Guide*.



15297

IMS now has Staff Timeclock. With this feature, clinic administrators can do the following:

- Keep track of employees' work hours.
- Remind employees about their break and lunch time.
- Manage employees' payroll cycles.

Clinic employees can also use IMS to check in or check out of the clinic and manage their time logs.

To know more about Staff Timeclock, see *Staff TimeClock User Guide*.



15298

In IMS, the Office/Employee Documents module is renamed to IMS Drive. With IMS Drive, you can now manage and track your clinic's office-related and entity-related documents on the **IMS Drive** screen.

To know more about IMS Drive, see *IMS Drive User Guide*.



13876

With the Medical Record Request Management module of IMS, you can now manage the requests made by insurance companies, lawyers, or third-party groups for a patient's medical records.

To use the Medical Record Request Management module, click **EMO > Medical Record Req. Mgmt.** This action opens the **Medical Record Request Management** screen.

To know more about **Medical Record Request Management**, see *Medical Record Request User Guide*.



15315

With the IMS Caller feature, you can now make a phone call by clicking the phone number in IMS. This feature is available in multiple modules of IMS, such as Chart View, Patient Contacts, Scheduler, and Patient Master.

To know more about IMS Caller, see *IMS Caller User Guide*.



14033

With the IMS Guest feature of IMS, you can now record the details of the guests that come into your clinic.

You can schedule an appointment for a guest's visit in the clinic, track the guest's check-in and check-out activities, and get the necessary documents that are printed, signed, or filled out by the guest.

To know more about IMS Guest, see *IMS Guest User Guide*.



14509

In IMS, you can now set up the Link With feature to automatically add a linked information to a patient's visit note.

To set up this feature, click **Setup > Visit Note >** double-click the applicable question template > select the applicable subquestion > click **Link with**. In the **Link with Left Pane Subquestion** window, select **Auto Add** from the list under **Action Type**.



15525

In IMS, the **Auto Add** option is now available in the **Fax/Print/Email/Pt Doc** section of the **Link With Left Pane Question** window of the **Visit Note** screen.

Select **Auto Add** to email and fax documents automatically when the visit note is signed off.

To know more about the **Auto Add** option, see *Send Documents on Visit Note Signoff User Guide*.



15371

The **Rx Management** window is a new window in IMS. To access **Rx Management**, click **Activities > Rx Management**.

The following are some of the features in **Rx Management**:

- You can view the prescription requests for patients from different sources, such as pharmacy, Surescripts, and the patient.
- You can approve, deny, electronically send, fax, or print a prescription request in **Rx Management** if you have the applicable security grant.
- You can now assign prescription requests to providers or other clinical staff in your clinic.
- In the **Dashboard** window of **Rx Management**, administrators can review pending requests from a certain time frame.
- You can also view laboratory results, vital signs, the last visit date, the patient's next appointment, chart view, and documents that are attached to the prescription request.
- Clinical staff can also add a prescription request for a medication refill, change, and discontinuation. They can also add a request for an authorization for specific drugs or request for a new drug.
- The **Monthly Controlled Substance** report is renamed to **Scheduled Rx**. The **Scheduled Rx** report is accessible in the **Scheduled Rx** tab of **Rx Management**.
- The **ePrescription Tracking** screen is no longer available in IMS. The features of **ePrescription** are now available in the **Rx Tracking** tab of **Rx Management** window.
- In the **Rx Tracking** tab, you can view the printed, faxed, and electronically sent prescriptions of a patient.
- You can also access **Rx Tracking** as a screen. To access **Rx Tracking**, click **Activities > Rx Tracking**.

- You can view the prescription requests for patients from different sources, such as pharmacy, Surescripts, and the patient.
- All requests from Surescripts for electronic prescriptions and the prescription requests from patients through IMS CarePortal and IMS Patient App are automatically recorded in the **Rx Management** window.
- All electronic requests from Surescripts are automatically marked with the **Electronic Rx Request** status. It is not necessary to assign the **Electronic Rx Request** requests manually from the **Fax Received** screen.
- The **Prescription** tab of the **My Task** screen is removed. You can now manage all prescription requests in the **Rx Management** window.
- The **Add Rx Request** option is now available on the following screens:
  - **Prescription** window of the **Visit Note** screen.
  - **Fax/HIE Received** screen. To access **Fax/HIE Received**, click **Utilities > Fax/HIE Received**.
  - **Prescription** tab. of the **Chart View** window. To access **Chart View**, click **Utilities > Patient > Chart View**.
  - **Fax** tab of the **My Tasks** screen. To access **Fax**, click **Activities > My Tasks > Fax**.
  - **Prescription** window. To access **Prescription**, click **Utilities > Patient > Prescription**.

The following are updates for the Prescription module:

- The **Prescription** window is now updated to display the patient's prescription better. To access **Prescription**, click **Activities > Prescription**. You can also access **Prescription** through the **Visit Note** screen.
- In the left pane of the **(A)ctive Rx** tab in the **Prescription** window, you can now add details about the prescription, such as the drug, quantity of the drug, daily supply of the drug, refills, pharmacy, status, and other shortcut options.
- When you select a prescription in the **Prescription** window, additional details about the prescription appear in the right pane.

- In each row for a prescription in the **Prescription** window, the **Approve & Edit**, **Approve & Send**, **Edit**, **Change**, **Discontinue**, **Copy and Edit**, and **Delete** options are now available.
- You can now electronically send and fax a prescription in the **Add Prescription** window of the **Prescription** window. To access **Add Prescription**, click **Add** in the lower pane of **Prescription**.
- All prescription request records are now available in the **Request (Number of Requests)** tab of the **Prescription** window.
- The **Add Drug** window is now updated to search for drugs in all drug prescription templates.
- The **Search Drug** window is now improved to separate the branded drugs and generic brands in the search results.



15393

With the Call Management feature, you can now track the incoming and outgoing calls of your clinic.

The voicemails that patients send through a Vonage account are also automatically imported to IMS. You can track and listen to these recordings or assign them to other employees.

In the **Voicemail Information** window, you can click the options in the **Quick Access Links** section to open the applicable windows. In these windows, you can perform the necessary actions related to the instructions that patients give in their voicemails.

To use the Call Management feature, please contact your account manager.

# IMS EMR

## Administrative

### Patient Special Search



108869 [1154931]

You can now export large amounts of data on the **Patient Special Search** screen in an Excel file format without system issues.

### Login



14444

In IMS, the password recovery procedure is now updated.

Previously, the system would send the actual password to the user's registered email address. Now, the user has to confirm their registered email address before the system sends a one-time verification code to their recently confirmed email address.

It is necessary that the user enters the verification code in the **Enter Verification Code** box in the **IMS** window to proceed to the **Reset Password** window.

### IMS Checklist



15299

With the new **Employee Checklist** screen in IMS Build 22, you can do the following:

- Assign task checklists to employees or an employee group.
- Remind employees of their tasks that are due.
- Track the status of the tasks in the checklist.

To know more about IMS Checklist, see *IMS Checklist User Guide*.

### Quick Scan



130369 [1280641,  
1315158]

You can now use the Quick Scan feature of the **Chart View** window without any system issue.

## Patient Document



135110 [1305502]

In the **Patient Document(s)** window, you can now scan documents without any system issue.

To access **Patient Document(s)**, click **Utilities > Patient > Document**.

## Patient Insurance



15344

In the **Patient Insurance** window, you can now set up a patient's eligibility for the Vaccines for Children (VFC) program. For patients who are 19 years or older, the option that appears in the **VFC** list is **Not VFC eligible**, and the list is automatically dimmed.

The option that you select from the **VFC** list in the **Patient Insurance** window is also automatically selected for the patient in the following windows or screens in IMS:

- **Patient Immunization** window.
- **Patient Immunization [Patient Details]** window of the **Visit Note** screen.
- Patient's visit note.

To know more about the VFC program in IMS, see *Unidirectional Immunization User Guide* and *Bidirectional Immunization User Guide*.

## MIPS



14902

For the Merit-based Incentive Payment System (MIPS) reporting year 2020, you can now generate the applicable registry reports for the following categories:

- Quality
- Promoting Interoperability
- Improvement Activity

To track the clinic's performance for MIPS reporting year 2020, click **Reports > MIPS > MIPS Dashboard**.

To know more about the updates on MIPS categories, see the following user guides:

- *MIPS 2020 Quality User Guide*
- *MIPS 2020 Promoting Interoperability User Guide*

- *MIPS 2020 Improvement Activity User Guide*
- *MIPS 2020 Dashboard User Guide*



15494

In the **MIPS Quality** window, you can now set up the required reminders for the Quality measures for the 2020 claim-based reporting.

To access **MIPS Quality**, click **Setup > Visit Note > double-click MIPS Quality**.

On the **Visit Note** screen, you can now view the MIPS Quality reminders that you set up in the **MIPS Quality** window when you process a super bill for eligible visits.

## My Tasks (Reminders)



139159, 118027  
[1331256,  
1219396,  
1252291]

IMS no longer crashes when you are printing or faxing documents in the **Reminders** section of the **My Task** screen even if you don't select a patient.

## Reports



105834 [1, 132,  
954]

In the **Report Center** window, you can now generate reports with large amount of data in an Excel file format without system issues.



132475

You can now generate the **TABLE 6B - QUALITY OF CARE INDICATORS 2020** report faster.



133011

Now in IMS, it is no longer necessary that you link a patient immunization with a visit note to have the patient be counted in line **10** of the **TABLE 6B - QUALITY OF CARE INDICATORS 2020** report.

## Reminder



15482

The system now automatically generates a reminder and sends email messages to specific users if you view patient records that you do not have the right to access.

To set up the reminder and email recipients, click **Activities > Reminder > Setup > Task > Patient Emergency Access**.

To know more about this feature, see *Patient Emergency Access User Guide*.

## Help



15419

When you click the **Help** symbol on any IMS screen or window, the system redirects you to the IMS ClientConnect video page about the module from where you clicked **Help**.

## Immunization



111277 [1164307]

In IMS, you can now set up the dosage unit of an immunization drug. To set up a dosage unit, click **Setup > Visit Note > double-click Immunization > enter the dosage unit in the applicable box under the Dosage Unit column heading**.

## Insurance Plan



129886 [1279098]

When you add a new insurance plan on the **Insurance Plan** screen, the “Record with the same Plan Code already exist in the system. Do you want to go to that record?” message appears if you enter a plan code in the **Plan Code** box that matches with an existing plan.

Click **Yes** so that the details of the insurance plan with the similar code appears in the applicable boxes on **Insurance Plan**.

## Visit Note Options: Left Frame



127597 [1260381]

Now in IMS, the provider that you select in the **Select Office/Provider/Proced** window remains selected even if you close the window.

To access **Select Office/Provider/Proced**, click **Setup > Visit Note > double-click Options (Left Frame) > click Set Display by Office, Provider and Procedure**. When the **Set Display by Office, Provider and Procedure** window opens, click **Add**.

## Setup



**132042 [1290667]** In the Appointment Booking System feature of Website4MD, the available slots that are visible are now the same as the available slots on the **Scheduler** screen of IMS.



**137533 [1320591]** You can now add a patient's secondary insurance details on the cover page of a fax. To set up a fax page to show a patient's secondary insurance, click **Setup > Admin > Fax Cover Page**. In the **Fax Cover Page** window, click **Set Columns**.



**15384** Now in IMS, the logo of Nexus HR is displayed on the following:

- **Employee Master** screen
- **Employee More Detail** screen
- **Employee Security** window

To access these screens and window, click **Setup > Office**.

To access the **Nexus HR** option through the **Help** option on the IMS menu bar, click **Help > Request Service**.

To access the **Nexus HR** symbol through **Help**, click **Help > Organization Information**.

Nexus HR is a company that specializes in hiring employees through their extensive exams and interview process. Point to the logo to view an overview of their services. You can also click the logo to access the company's website.

In the Nexus HR website, you can know more about their personalized offerings, such as their Human Resource, Payroll, and Benefits services.

To remove this feature, contact [support@meditab.com](mailto:support@meditab.com).



**122060 [1224263, 1228810, 1232212, 1277267]** IMS no longer crashes when you open the **Signature** window after you make changes on the **Patient Master** screen.



132301

A new tag is added in the Letter Template module for Lab Requisition Layout. You can now use the **ins carrier code** tag if you want to add the insurance carrier code to the letter template for Lab Requisition Layout.

To customize a letter template for Lab Requisition Layout, click **Setup > Other > double-click Lab Requisition Layout (HL7)** to open the **Lab Requisition Print Layout (Letter template)** window where you can customize a letter template.



131762 [1287840]

In IMS, the information that you enter in the **A.K.A** box of the **Office** screen remains even after you add changes to an office and then close **Office**.

To access **Office**, click **Setup > Office > double-click Office**.

## Clinical

### IMS Screens with Graphs and Charts



15573

In IMS, you can now view charts in the applicable windows and screens using the WebKitX controls instead of the Flash Player controls.

### Visit Note



14017

With the Antepartum Record feature, you can record the patient's antepartum care procedure and her prenatal visits. You can also record her pregnancy history, track fetal growth, and calculate the estimated date of delivery based on the health assessments that you perform.

To use the functionalities of Antepartum Record, contact your account manager.

To know more about the Antepartum module, see *Antepartum Record User Guide*.



15162

In IMS, you can now record past pregnancies of female patients using the applicable option in the left pane of the **Visit Note** screen.

To know more about this feature, see *Past Pregnancies User Guide*.



15385

The following updates are added to the iSpot question template on **Visit Note**:

- You can now draw on an iSpot image.
- The **Note** box is now available in the **Select iSpot** window.



130428

You can no longer link a SnomedCT code with an ICD code in the **Patient Diagnosis [Patient Details]** window.

Previously, you can link a SnomedCT code with an ICD code when you click the **Link SnomedCT** symbol or **Map SnomedCT** option in **Patient Diagnosis [Patient Details]**.

In IMS Build 22, the **Link SnomedCT** symbol and the **Map SnomedCT** options are no longer available.



132309

When you point to options on both the left-pane and the right-pane of the **Visit Note** screen, you can now view where the cursor is and which options you selected.

This is helpful for users who use IMS on high-resolution screens.



130533

With the **Automatically create visitnote from Auto Checkin in IMS/IMS OnArrival** system parameter, you can now set IMS to either create a new visit note or link the existing visit note that was created within the same day when a patient checks in through IMS OnArrival.

To know more about this new enhancement, contact [support@meditab.com](mailto:support@meditab.com).



15836

The search algorithm for ICD codes is improved. The system can now search for all possible combination of keywords, and then sort the results according to their closest possible match.

The system also compares the entered keywords with the available synonym of ICD codes, and then filters the results accordingly.



121185 [1222112]

In IMS, you can now send the prescription details of a patient through the **HIE** option. You can access **HIE** through the following ways:

- Click **Activities > Visit Note** > select a patient > click **HIE** in the right pane.
- Click **Utilities > Patient > Document > HIE**.



15420

In IMS, you can now play recordings that are uploaded from IMSGo using the Windows Media Player application.



136749 [1315427]

In the right pane of the **Visit Note** screen, the applicable question template now opens instead of the **Report Reaction** window when you click **Go to > Other 10**.



135285 [1308309,  
1310639, 1322937,  
1322935]

In IMS, the patient's name is now displayed properly on the gold bar and the center pane of the **Visit Note** screen.



133838 [1297690,  
1321690]

The **Show Link** window now shows the generated link-with results of macro questions from a visit note without any system issues.



15395

In IMS, you can now create records for supervising providers based on their offices and insurances.

In the **Supervising Provider for Provider's Name** window of IMS, you can also assign multiple supervising providers to a performing provider based on their offices and insurances. To access the window, click **Setup > Office > double-click Employee/Provider > click Supervising Provider**.

To know more about this enhancement, see *Employee/Provider User Guide*.

## Televisit



15431

Providers can now view and directly join a televisit through Televisit Portal. They can also receive notifications if their patients have joined their scheduled televisit appointments.

Televisit Portal is accessible through any browser in any device. To know more about Televisit, see *Televisit User Guide for Providers*.

## Televisit and Voice Mail



15618

In IMS, a notification now appears if a patient joins a televisit appointment. If you click the notification, the **Check In/Out** screen opens with the **TV** check box automatically selected.

With Smart Alerts for the Voicemails feature, you can now receive notifications for pending voicemails in a specified time interval.

To turn on the feature for specific users, click **Setup > Admin >** double-click **Smart Alerts**. To set up the time interval for the notifications, click **Setup > Admin >** double-click **Smart Alerts >** click the **Other Parameters** symbol.

## Hospital Access



15658

The Hospital Access module is now available in IMS. In this module, you can view patient information in read-only mode based on the case types and tabs that you select in the **Parameters** window.

To set up the case types and tabs that appear in the **Hospital Access** window, click **Setup > System Parameters > Other >** enter the necessary information for the **Select Case Type(s) and Module(s) for Hospital Access** parameter.

To know more about the Hospital Access module, see *Hospital Access User Guide*.

## Authorization and Referral



15189

In IMS, the Authorization and Referral modules are now combined. All existing referral records that are created through the **Visit Note** screen are now available on the **Auth./Referral Tracking** screen.

**Auth./Referral Tracking** is the new name for the **Authorization Tracking** screen.

To access **Auth./Referral Tracking**, click **Activities**, and then click **Auth./Referral Tracking**.



15345

Patients can now see their authorization and referral requests in IMS Patient App and IMS CarePortal. Patients also get notifications when there are updates on their requests.



15143

When you create authorization and referral requests in IMS, the system automatically submits electronic requests to QuickCap.

To know more about this enhancement, see *Authorization Request to QuickCap User Guide*.



137769 [1319439]

On the **Auth./Referral Tracking** screen, you can now delete authorization and referral entries at the same time if you select the check boxes in the leftmost column.

## Prescription



13674

In IMS, the Surescripts Rx History feature on the **Prescription** screen is now updated from version 2.0 to version 3.0. Claim-based and Rx-based medication histories are now merged.

To view both types of medication histories, click **Utilities > Patient > Prescription**. In the **Surescripts Rx History** window, you can view the medication history of the patient. You can also resend Surescripts requests.

To know more about the Surescripts Rx History feature, see *Surescripts Medication History User Guide*.



14866

With the Nearby Pharmacy feature in IMS, you can now search for pharmacies with postal codes that have the same first three digits as that of the patient's or office's postal code.

To search for a nearby pharmacy, select the **Near By Pharmacy** check box in the right pane of the **Search Option** window from the **Prescription** screen.

When the search results appear, you can now see both the pharmacies that are manually added into the system and the pharmacies from the Surescripts network.



15519

To know more about the Nearby Pharmacy feature, see *Pharmacy Setup User Guide*.

Providers can no longer send an e-prescription to their patients for the following scheduled medications:

- Buprenorphine or Subutex
- Suboxone

To send an e-prescription, it is necessary that the prescribing provider has a valid Narcotic Addiction Drug Enforcement Agency Number (NADEAN), as mandated by the guidelines from Surescripts.

To know more about the changes for the prescription module, see *Prescription User Guide*.



15529

You can now view the percentage of prescriptions that are checked to comply with the prescription drug monitoring program (PDMP) in IMS, as well as the Electronic Prescribing for Controlled Substances (EPCS) transactions, in the **Monthly Controlled Substance Report** report.

To open the report, click **Reports > Monthly Controlled Substance Report**.



13666

In the Prescription module of IMS, the Surescripts formulary feature is now available when you search for medication in the **Search Drug** and **Edit Prescription (Drug Details)** windows.

In the **Formulary Details** pane of the **Prescription** screen and the **Edit Prescription (Drug Details)** window, you can view both the formulary and the patient's benefits in real time.

To know more about the Surescripts formulary feature, see *Formulary and Prescription Hub User Guide*.



91304 [1055539]

The patient's medication history in the **Rx** tab of the **Chart View** window is now displayed properly.



14546

In IMS, you can no longer electronically send obsolete drugs based on the Surescripts guidelines.

If you send an obsolete drug, the system displays a message that suggests you change the obsolete drug to its representative drug.

To know more about this update, see *Prescription User Guide*.



15181

To comply with the National Council for Prescription Drug Programs (NCPDP) SCRIPT and Surescripts guidelines, IMS now uses medication units from First Databank (FDB). You can no longer edit medication units in IMS.

The following are the updates to the Prescription module:

- You can now view the package size and package unit for a drug in the **Drug Search** window.
- The package size and unit for the selected drug is now displayed in the **PKG. Size** and **Unit** boxes of the **Prescription Add/Edit** window.
- A package quantity box now appears to the right of the **PKG. Size** box. When you enter a drug's package quantity in the package quantity box, the system automatically calculates the actual quantity of the drug. To come up with the result, the system multiplies the drug's package size by its package quantity.

The **PKG. Size** and **Unit** boxes are also available in other screens and windows in IMS, such as the **Drug Template** screen, **Drug Value** window, and other areas in IMS that are related to the Prescription module.



133225 [1296049]

IMS no longer crashes when you enter the applicable information in the **Lot No.** box when you dispense medication for your patients on the **Drug Dispense** screen. To access **Drug Dispense**, click **Activities > Drug > Drug Dispense**.



130760 [1283005]

If you add a new drug to a drug template using the **Save to Template** option in the **Edit Prescription (Drug)** or **Add Prescription (Patient Details)** windows, the National Drug Code (NDC) of the drug is also saved on the **Prescription Template** screen.



130462 [1281440,  
1283691]

When you click **Check Now** in the **Last PDMP Check** section of the **Edit Prescription [Drug Details]** window, the system redirects you to a website that shows the selected patient's PDMP report.



137171 [1377245]

In the **Prescription [Patient Name]** window, the “You haven't taken any action for selected Rx(s).” message no longer appears when you select the **S** check box of a prescription and then close the window.

To access **Prescription [Patient Name]**, click **Activities > Visit Note > Prescription**.



140833

After the provider approves a refill request, the system automatically fixes the capitalization of the prescription SIG in the **Sig** box of the **Last Approved/Denied Refill** section in the **Edit Prescription** window. The first letter of the SIG will be set in uppercase, while the rest of the letters will be set in lowercase.

## Diagnostic/Lab



15366

The following are the enhancements in the **Diagnostic/Lab Order** window:

- The window now has the **Order History** pane where you can view the laboratory order history of the patient.
- When you search for any keyword in the **Search** box, the results now show laboratory tests and observations that are related to the keyword.



14594

In IMS, you can now view the document of a patient's laboratory result on the **Diagnostic/Lab Order Tracking** screen before you import the result. With this enhancement, the **Notes** section of the results can now be viewed before you import the laboratory results.

To view the document, click **Activities > Diagnostic/Lab Order Tracking > Receive >** select the applicable result in the **Import HL7 Report Files** window > click **View Result**.



15397

The following are new features in the **Diagnostic/Lab Order** window of the **Diagnostic/Lab Order Tracking** screen:

You can now select the applicable collection center from the **Collection Center** list. Collection centers that are near are in blue font. To add a collection center in IMS, click **Setup > Visit Note > double-click Diagnostic/Lab Collection Center**.

When you select the applicable laboratory from **Lab**, the following indicators appear beside the applicable laboratories:

- **(I) - Insurance Default**
- **(S) - System Default**
- **(P) - Patient Preferred**

When you point to the **information** symbol beside the **Bill Type** list, the patient's case insurance appears if a case is selected for the patient. The patient's primary insurance carrier appears if no case is selected.

To know more about the enhancements for the **Diagnostic/Lab Order Tracking** screen, see *Lab Interface Setup User Guide* and *Lab Interface User Guide*.



15404

You can now customize the printing of a requisition according to its laboratory when you send an HL7 order.

On the **Diagnostics/Labs** screen, the **Print Requisition on send** check box is now available, while the **Print Requisition while sending HL7 order** system parameter is removed.

By default, the **Print Requisition on send** check box is selected for IMS users who turned on the **Print Requisition while sending HL7 order** system parameter on the previous build. For users who turned off the system parameter, **Print Requisition on send** is not selected.

## Quick Note



15385

In the **Quick Note** window of the **Visit Note** screen, you can now customize the following interface elements for a more convenient Touch User Interface experience:

- Check boxes

- Radio buttons
- Yes-or-No options

To customize these elements, contact [support@meditab.com](mailto:support@meditab.com).

## My Task



138060 [1323284]

In the **Fax** section of the **My Task** screen, entries are now sorted properly when you click the **Category** and **Forwarded By** column headings.

## Spiro



130046  
[1279235, 1290184,  
1284776]

IMS no longer crashes when you save the details of the **Spiro** test from the right pane of the **Visit Note** screen if the test is linked with a prescription and an ICD or CPT code.

## Setup



123950 [1229891]

On the **Prescription Template** screen, when you save a drug group, the options in the **Strength** column no longer show duplicates.

## Prescription



136429 [1314303]

IMS no longer crashes when you start or check the Electronic Prior Authorization (ePA), even if the ePA process fails to run.

## Link With



131964, 128340  
[1287205, 1265735]

IMS no longer selects duplicate diagnosis codes that have different descriptions in the **CPT** section of the **Link With** window of the **Visit Note** screen.

## Scheduler, Check In/Out, Call Information, and Web Appointments



15586

The following updates are available for the Check In/Out, Scheduler, Call Information, and Web Appointment modules of IMS:

- The **Waiting For Appointment** list is now available on the **Check In/Out** screen. You can also check in a patient through **Waiting For Appointment** on **Check In/Out**.

- On the **Scheduler** and **Check In/Out** screens, there are now separate **Waiting For Appointment** lists for televisit and non-televisit appointments.
- You can now add a patient to the **Waiting for Appointment** list through the **Call Information** window. Click **Add to Appointment Waiting** in the left pane of **Call Information** to add the patient to the waiting list.

The following are other related updates:

- The default extension that you select from the **Default Ext.** list on the IMS log-on screen is also displayed in the lower pane of IMS. When you click the extension, the **Select Default Extension** window opens.
- With the **Pending Import** option of the **Scheduler** screen, you can now open the **IMS CarePortal Import** screen through **Scheduler**.
- The **Appointments** tab of the **IMS CarePortal Import** screen and the **Website4MD Import** screen are now merged. All the appointments requested through IMS CarePortal, IMS Patient App, and the Appointment Booking System feature now appear on both the **IMS CarePortal Import** and **Web Appointments** screens.
- The **Website4MD Appointments** screen is renamed to **Web Appointments**. To access **Web Appointments**, click **Utilities > Web Appointments**.



15816

You can now view a patient's dental chart in the **Dental Chart** window in view-only mode. To access **Dental Chart**, click **Activities > Scheduler > right-click an appointment > click the Dental Chart (view-only)** option.

You can also access the **Dental Chart** window when you right-click an appointment in the **Appointment** pane of the **Check In/Out** screen, and then click the **Dental Chart** option.

## IMS Sticky Notes



15375

The Sticky Notes feature is now available in IMS. With Sticky Notes, users can now keep their daily notes within the system. Users can also enter notes for a specific office, designation groups, and employees in office groups.

With Sticky Notes, users can save time because they no longer have to switch applications.

## Question Template



129645

Now in IMS, the **Sublevel response required** symbol appears beside a required question if you skipped answering the question in the left pane of the **Visit Note** screen.

## Front Desk

### Check In/Out



15402

In IMS, you can now view the insurance details of a patient in the center pane of the **Check In/Out** screen based on the insurance plan that was selected from the **Insurance** list in the **Check In** window.

A template feature is also added to **Check In/Out**.

In the **Sort** window of **Check In/Out**, you can now sort the information in the center pane in ascending or descending order based on the types of payers.



127673 [1261461]

In IMS, the system now generates the accurate forms to be filled out, signed, printed, or scanned, without rounding off the age of the patient.

Previously, the system rounded off a patient's age before it generates the forms.

### Scheduler



15577

In IMS, you can now receive the updated confirmation status of an appointment on the **Scheduler** screen through the WELL interface.



15878

You can now edit the email and cell phone number boxes in the **Schedule Entry** window of the Scheduler module. The changes that you add also appear on the **Patient Master** screen.

A notification appears if contact details are missing when you are creating an email or text reminder for the appointment.

Click **Update Cell no.** or **Update Email-ID** to update the mobile phone number or email address. Click **Continue without Reminder** to proceed without setting a reminder with the missing contact details. Click **Close** to close the reminder window.

## Diagnostic/Lab



134926 [1306264]

The **Instruction** window now opens when you save a diagnostic or laboratory order or if you click the **Show Instruction** option in the **Diagnostic/Lab Order** window from the **Visit Note** and **Diagnostic/Lab Order Tracking** screens.

To set up the Instruction feature, click **Setup > Other > Instruction**.

## Fax



81483 [934153,  
951473, 1064805,  
1066681, 1086799,  
1149650, 1165795,  
1177622, 1249905,  
1276888, 1285787,  
1294487, 1313351,  
1314282, 1314284,  
1314758, 1315005,  
1316460, 1318001,  
1312649, 1316893,  
1322628, 1325449,  
1326611, 1331050]

IMS no longer has system issues when you send specific files as fax messages.

## My Tasks



15331

The Dashboard feature is now available in the My Tasks module in IMS. With this feature, you can review tasks that are assigned to other users under different categories.

You can access this feature if you have the **Activities > Allows to see others Task** user right.



130326 [1280989]

Now in IMS, only the active future appointments appear in the **Next Appt. Date** column of the **Reminders** window. To access **Reminders**, click **Activities > My Task > Reminders**. Previously, the dates of cancelled appointments were also displayed in **Next Appt. Date**.

## Fax and HIE



15386

To improve the search for deleted fax records, the following filters are now available in the **Deleted Fax** window of the **Fax/HIE Received** screen:

- Patient
- Category
- Search

To access the **Deleted Fax** window, click **Utilities > Patient > Fax/HIE > View Deleted**.

## Multi Scan/Select



130378 [1281414]

On the **Multi Scan/Select Document** screen, the default level of priority in the **Priority** list is now set as **Low** when you scan documents.

## Scheduler and Check In/Out



15944

On the **Scheduler** and **Check In/Out** screens, the patient's also-known-as (AKA) name is now visible. The patient's display name follows the *Surname, First Name "AKA" (Chart Number)* format. When you point to a patient's schedule, their name also appears in the same format.

On the **Visit Note** screen and in the **Patient Search** window, the name of the patient follows the *Surname, First Name Middle Name "AKA" (Chart Number)* format.



139319

When you enter a note on the **Insurance Plan** screen and in the **Patient Insurance** and **Case Insurance** windows, the Note symbol appears to the right of the insurance plan in the Insurance section of the following areas in IMS:

- Schedule Entry window
- Check In window
- Check In/Out screen

- **Check Out** window
- **Walk-In** window

Click the Note symbol beside the insurance plan to view the note.

## Patient Special Search



137268

The Auto Text feature now works for the **Send Text** screen of the Patient Special Search module.



113799 [1180618, 1248795]

The **Patient Special Search** screen no longer crashes when you add an allergy as a filter criterion when you search for a patient.



133624

A header is now available in a .csv file when you export data from the **Patient Special Search** screen.



15924

On the **Patient Special Search** screen, you can now use the **Procedure** filter option if you select the **Not Booked** option from the **Appt. Date** list.



15388

In **Visit Section** of the **Patient Special Search** screen, the following filter criteria are added:

- **Visit Date**
- **Provider**
- **Office**

With these filter criteria, you can search for a patient using his or her visit date, provider, and office.

On **Patient Special Search**, the **Next Appt** filter criterion is also renamed to **Appt. Date**. Also, **Cell Phone** is now added in the **Column Configuration** window of the **Patient Special Search** screen.

To know more about these updates, see *Patient Special Search User Guide*.

## Patient Note



123741 [1231879]

You can now use the Auto Text feature in the **Response** box of the **Patient Note** window. To access **Patient Note**, click **Utilities > Patient > Note**.

## Patient Appointments



15869

In IMS, you can now click the **Edit Appointment** symbol in the **Patient Appointment(s)** window to adjust a patient's future appointments. **Edit Appointment** is also available on the **Scheduler** tab of the **Chart View** window.

# IMS CarePortal

## Clinical

### IMS CarePortal Import



15848

The following are updates for the IMS CarePortal Import module:

- On the **Form Import** screen, you can now see the patient's chart number to the right of the patient's name.
- In the left pane of the **Form Import** screen, the expand and collapse symbols are now available.
- In the **Photos** tab of the **IMS Care Portal > Import** window, the **Zoom** option is now available. You can zoom in on a photo before you import it to IMS.
- In the **Note** tab of **IMS Care Portal > Import**, the Walley symbol is now available in the **Patient** column.
- When you schedule an appointment through the **Appointments** tab of **IMS Care Portal > Import**, the patient's preferred date and time appear if you point to a date, even if you switch between multiple dates.

### IMS CarePortal > Form Import



15935

Based on the **Import** and **Form** statuses of a form, the following right-click features are now available for each entry in the left pane of the **Form Import** screen:

- Access to patient information similar to the Walley symbol's features.
- Import a form.
- Mark a form as **Active** or **Inactive**.

- Print a form.

## Documents



138413 [1324875]

The forms-to-be-filled type of care plans are now visible on IMS CarePortal and no longer show errors.

## Billing

### Biller

### A/R Activities



130757 [1283319]

When you export a report from the **A/R Activities** screen, the aging column headings are now displayed correctly.



135901 [1311462]

On the **A/R Activities (Detail by Patient)** screen, the **Open Credit** label no longer overlaps with the name of the patient when you clear the **Show** check box for any column in the **A/R Activity Report Layout** window.



109664

You can now export large amounts of data on the **A/R Activities** screen in an Excel file format without system issues.



137416 [1314945]

Now in IMS, any report that you export from the **A/R Activities** screen retains its layout even after you generate the report.

### Claims



102005 [1313260,  
1111343]

When you print a CMS 1500 paper claim, the hyphen on postal codes no longer appears for codes that have five or more digits.



137593 [1316328]

With the **Sorting of CPT in claim** system parameter, you can now set up how CPTs are sorted in CMS 1500 and Dental claims.

### Chart View



15870

All four modifier columns for CPTs are now added to the **Bill** tab of the **Chart View** window.

## Patient Statements



130047 [1277250]

For patient statements that are in the Patient Statement - Customized format, the default system setting to generate a patient statement after the number of days that you set for the **Patient Statement Days** system parameter now works properly.



127471 [1253335,  
1289298]

The overall performance of the Patient Statement module is improved. IMS no longer crashes when you export numerous patient statements that are in the Patient Statement - Customized format.

## Charge Posting



15524

The performing provider that will appear in the visit note that you access from the left pane of the **Charge Posting** screen is based on the provider that you select from the **Billing Perf. Provider** list in the **Supervising Provider for Provider** window.

To set the applicable provider, click **Setup > Office > double-click Employee/Provider > click Supervising Provider > select the applicable option from the list under Billing Perf. Provider.**

Also, you can now select a performing provider from the **Perf. Provider** list on the **Charge Posting** screen. The provider that you select is automatically set as the provider in other billing-related windows or screens.

To turn on this feature, click **Setup > System Parameter > Charge Posting > select Yes for the Allow to edit Performing Provider only in Charge Posting** parameter.

To know more about the Charge Posting module, see *Charge Posting User Guide*.



14789

In IMS, you can now leave the **S** check box of the general **Visit Note** screen cleared by default when you select a different billable provider on the **Charge Posting** screen.

To turn on this feature, click **Setup > System Parameters > Charge Posting > select the Yes option for the Default Sign off**

checkbox unchecked for **Bill Under Provider from Charge Posting** parameter.

## Reports



15470

The **About Billing Report** section of the **Report Center (Billing)** window is now updated to show column headings and other details about major billing reports in IMS.



131720 [1287909]

In IMS, the **Daily Deposit** report now shows the **Managed Care Payment Posting** receipts.



127903 [1243545]

For the **Practice Summary for Bill** and **Practice Summary for Bill (Performing Provider)** reports, the information in the **Used OP** column is now displayed correctly.



128226 [1265655]

In the **Writeoff Summary By All Options Report Parameters** window, the **Writeoff Reason** option is now available in the **Show Summary By** section.



124609 [1238990]

In IMS, the following reports now have the **Claim** and **Adj (+)** columns:

- **Receipt Detail (By CPT)**
- **Receipt Detail (By Insurance)**
- **Receipt Detail (By Performing Provider)**
- **Receipt Detail (By Receipt No.)**

Select the check box under **Show** in the **Receipt Detail By All Options with Header Report Parameters** window to set up these columns.

## Patient Insurance



15389

In the **Patient Insurance** window of IMS, the **Relation** list is now updated. You can no longer select invalid relationships from the **Relation** list.

If a patient's insurance is already linked with an invalid relationship, the relationship is now displayed in red font in the **Relation** list.

Point to the red warning symbol beside **Relation** to view the



112434 [1170883,  
1170183, 1160013,  
1161334, 1139871]

reason why the relationship is invalid.

It is now necessary to enter the applicable information in the **Ins Type** box when you add a nonprimary insurance or case insurance with Medicare or Medicare Part A insurance as the carrier types.

Also, if a claim is submitted to a primary insurance, the system does not send the insurance type code on a professional electronic claim.



15301

The following are updates related to the Patient Insurance, Diagnostics/Labs, and Auth./Referral Tracking modules:

- You can now view the contact details and web address of an insurance in the **Insurance URL List** window. To access **Insurance URL List**, click the Walley symbol > **Insurance URLs**.

To set up the contact details and web address of an insurance, click **Setup > Payer/Medical Service/Reference > double-click Insurance Carrier or Insurance Plan > click Website List**.

- The **Website List** option is now available in the right pane of the **Diagnostics/Labs** screen. Click **Website List** to open the **URL Reference - Laboratory Name** window where you can add a website reference for the laboratory or diagnostic center.

To access the **Diagnostics/Labs** screen, click **Setup > Payer/Medical Service/Reference > double-click Diagnostics/Labs**.

- You can also access the **URL Reference - Laboratory Name** window through the **Diagnostics/Lab Order Tracking** screen. To access **URL Reference - Laboratory Name**, right-click an entry, and then click **Lab URL**.
- The **Website List** option is now available in the right pane of the **Referral Doctor/Location** screen. Click **Website List** to

open the **URL Reference - Referral Doctor/Location Name** window where you can add a website reference for the referral doctor or clinic.

To access the **Referral Doctor/Location** screen, click **Setup > Payer/Medical Service/Reference > double-click Referral Doctor/Location**.

- You can also access the **URL Reference - Referral Doctor/Location Name** window through the **Auth./Referral Tracking** screen.

To access **URL Reference - Referral Doctor/Location Name**, click **Activities > Auth./Referral Tracking > right-click an entry > click either Referral Doctor URLs or Referral Location URLs**.

## Clearinghouse



125150 [1200987]

In the lower pane of the **Send/Receive EMC Claims** window, you can now view the total number of error messages when you submit an electronic claim to an inactive clearing house.

## Insurance Payment Posting



108828 [1152507,  
1172780]

In the Insurance Payment Posting module, only one IMS user can edit or access an insurance receipt at a time. If another user tries to access the same receipt, the system displays a message indicating that the receipt is currently accessed by another user.

# Administrative

## Reports



15398

You can now fax and email a report in the following windows:

- **Patient Ledger(Report)**
- **Payment History**
- **Patient Financial History**
- **Report Center**

You can also save a report as a document in the following windows:

- **Patient Ledger(Report)**
- **Payment History**
- **Patient Financial History**

## Front Desk

### Eligibility Tracking



15362

You can now view the name of the primary care providers (PCP) on the **Eligibility Tracking** screen. Point to the name of the provider in the **PCP Info** column to view more information about the PCP. You can also click the name of the provider to open the **Primary Care Provider Info** window and view important details about the provider.

In the **Eligibility Benefits Info (Payer: Name)** window, the **Primary Care Provider Info** section is now available. In **Primary Care Provider Info**, you can view the details about the PCP. You can also view more information about the PCP in the **Patient Insurance** window.

## Allergy EHR

### Clinical

#### Immunotherapy



15620

The following are updates for the Allergy module in IMS:

- The **Bal. Vol.** box is now available in the center pane of the **Immunotherapy** window.
- The **Extract No.** column is now available on the **Patient Vial Management** screen.

The **Extract No.** column is also added to the following reports for Immunotherapy:

- **Shot Given On Dates**
- **Last Shot Report By Patient**

- Last Shot Report For All Patients
- Last n Shots Report
- Next shot dates



136713 [1315969]

In the **Immunotherapy** tab of the **Chart View** window, the entries for immunization shots are now sorted similarly to the immunization shots in the **Injection History** window.

To access **Injection History**, click **Activities > Immunotherapy > Immunotherapy > History**.

## Fertility EMR

### Front Desk

#### Sample Collection



139941

The **donor\_id** tag is now available in the **Add Column** window of the **Sample collection - Patient** (*Template Name*) screen. If you add the donor tag to a template, the system prints the label with the registered external donor ID linked with the patient.

### Clinical

#### Embryology and Embryo Cryopreservation



15640

The **Add following Day(s) for Embryology** system parameter in the **Parameters** window now has the **Day 4** option. With this option, you can now record the Day 4 culture properties of embryos on the **Embryology** screen.

In the **Embryo Cryopreservation** window, you can now also cryopreserve Day 1 and Day 4 embryos.

To know more about this enhancement, see *Day 2 and Day 7 Observations for ART User Guide*.

## Sample Collection



15963

You can now view laboratory tests that are externally added based on the status selected in the **Lab Status** box on the lower gold bar of the **Sample Collection** screen.

## Patient Cycle List



15606

Validations for exporting patient cycles in IMS Fertility-EMR are now updated based on requirements from both the Society for Assisted Reproductive Technology (SART) and Center for Disease Control and Prevention (CDC) registries.

## Inventory Tracking



136311

A header is now available in a .csv file when you export data from the **Inventory Tracking** screen.

## Cycle Master



140307 [1336399]

In the **Cycle Master** window of the **Patient Master** screen, you can no longer delete the stim start date in the **Stim Start Dt** box or the last menstrual period in the **LMP Date** box of a cycle if the cycle is already linked with a stimsheet that has similar dates with the stim start or LMP date.



140523 [1337267]

In the **Other Details** window of the **Patient Master** screen, you can no longer change the information in the **Party Type** box if the patient's stim sheet is already created for the cycle.

## Visit Note



140255 [1334964]

When you create a billable telephonic or nonbillable telephonic visit note with a medical history question template in the **Visit Note** tab of the **Chart View** window, the visit note is now created successfully without issues.

## Patient Master



128928

The option to add or link a partner with a patient is no longer available in the **Bill To** window of the **Patient Master** screen.

To link a patient with a partner, click **Partner** in the right pane

of the **Patient Master** screen to open the **Link Partner** window.

## Fertility Billing

### Clinical

#### Packages



15613

In IMS, the system now links a Fertility EHR package with other packages. These linked packages are displayed as a recommendation while the patient selects a package for the next cycle.

To link a Fertility package with another package, click **Setup > Fertility > Packages**.

## Cosmetic

### Administrative

#### Procedure Setup



136038 [1312231]

You can now add a new procedure in the **Procedure Setup** window without any system error.

### Clinical

#### Sales Invoice



15329

In the POS module of IMS, you can now use the cash drawer of your clinic. The cash drawer model that IMS supports is the Posiflex CR-3115 USB Cash Drawer.

## Reports



115665 [1189228,  
1322060]

If a sales invoice is deleted on the **Patient Ledger** or **Charge Posting** screens, the deleted invoice is no longer counted or recorded in any of the invoice-related reports in IMS.

## Photo Album



15570

With Doc Import Utility in IMS, you can now upload patient photos that are exported from TouchMD directly into the **Photo Album** window of IMS.

# VAS

## Administrative

### Reports



15075

To improve the performance of the National Quality Forum (NQF) and Uniform Data System (UDS) reports, the following updates are added in IMS:

- With the **Auto refresh NQF and UDS report for selected Year** system parameter, you can now set up the years that you want to include in the NQF or UDS reports. In the **Parameters** window, you can select up to two years that you want the system to include in the report. After you save the changes, the system automatically refreshes the count at nighttime.
- The **Refresh** symbol is now available in the **Parameters** window of the **TABLE 6B - QUALITY OF CARE INDICATORS 2020** and **TABLE 7 - HEALTH OUTCOMES AND DISPARITIES** reports. Click **Refresh** to manually refresh the data that appears in the report.

## UDS



15330

In IMS, UDS Reports now meets the requirements for the 2020 reporting year. The updates are based on the approved UDS

Program Assistance Letter (PAL) changes and the UDS 2020 manual.

To know more about the updates in UDS Reports, see *Uniform Data System (UDS) 2020 User Guide*.

## Clinical

### IMS Chat



15867

IMS Chat is now improved to give users a better experience while communicating with other IMS Chat users.

IMS Chat helps IMS users communicate online and exchange real-time messages, images, and documents faster.