

# 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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