



Monthly Software Update

May 2017




All New This Month

- Validation Update
- Two New Permissions for Timesheets/Scheduling
- Bulk Void Payments
- Update to Files Upload Screen
- Set Multiple Goals on Graph
- Custom Tables in Notes Templates

Validation Update

- Validation on an appointment now has a Disabled/Enabled toggle. Each appointment defaults to Disabled. *See updated Help Article below.*
- When enabled, provides user control and on-demand check for issues with authorization selected and overlapped appointments.
- User can still click a checkbox to scheduled an appointment with an issue

Authorization & Billing

Auth/Code	Length/Time
<p>0364 Tricare - first 30 min </p> <p>May 01 to May 31 - Payor: Blue Cross Blue Shield of Massachusetts</p>	<input data-bbox="1213 691 1524 743" type="text" value="30 minutes"/> 11am - 11:30am

Choose a single, or add multiple codes and authorizations along with their estimated time-spent for this appointment. Drag items up or down to reorder them.

[+ Add](#)

Notes

Add additional notes visible to all participants of this appointment

Validation

Disabled

[Help Article](#)

Update Appointment

 View Calendar

Cancel Event

Delete Event

Two more New Permissions

- Timesheets > Allow Conversion Modifications
 - Allows the user to edit details of their timesheet while converting
- Appointments > Allow Edit Converted
 - Allows the user to edit previously converted appointments on the schedule

These permissions are applied to each user upon release. Removing a permission from a user will remove the user's ability to do what the description above details.

[Help Article](#)

Bulk Void Payments

- Users now have the ability to bulk void payments. Cannot void Credit Cards
- Can be useful when searching for errors or ensuring your billing screen
- Has a double confirm that user wants to delete all selected payments with a required Reason for Void and an I'm Sure checkbox

[Help Article](#)

Void Payments

You are about to void **28** payments to a total of **\$2,590.44**

Reason for Void
Required

Error in payments

Void Payments I'm sure Close

Payment Type	Amount	Description
Check	232	1st Med Companion Life Insurance Company: Standard
Check	232	Acclaim: Standard
Check	232	Accountable Health Plan: PPO (New)
Check	232	S: Advocate Physician Partners: Standard
Check	232	S: 1st Med Companion: Standard

Load Totals

Upload Files Updated

- There is now only one page to Upload Files.
- Warning will show if user tries to upload more than 20 files, with error letting user know how many files have been removed
- Override name option will override each filename to what user chooses.

Location To my account
 To someone else's account













Benji Dog (Client ID: 229616) ×

Share with this user
 Lock file(s) after uploading

Override Filename

Name

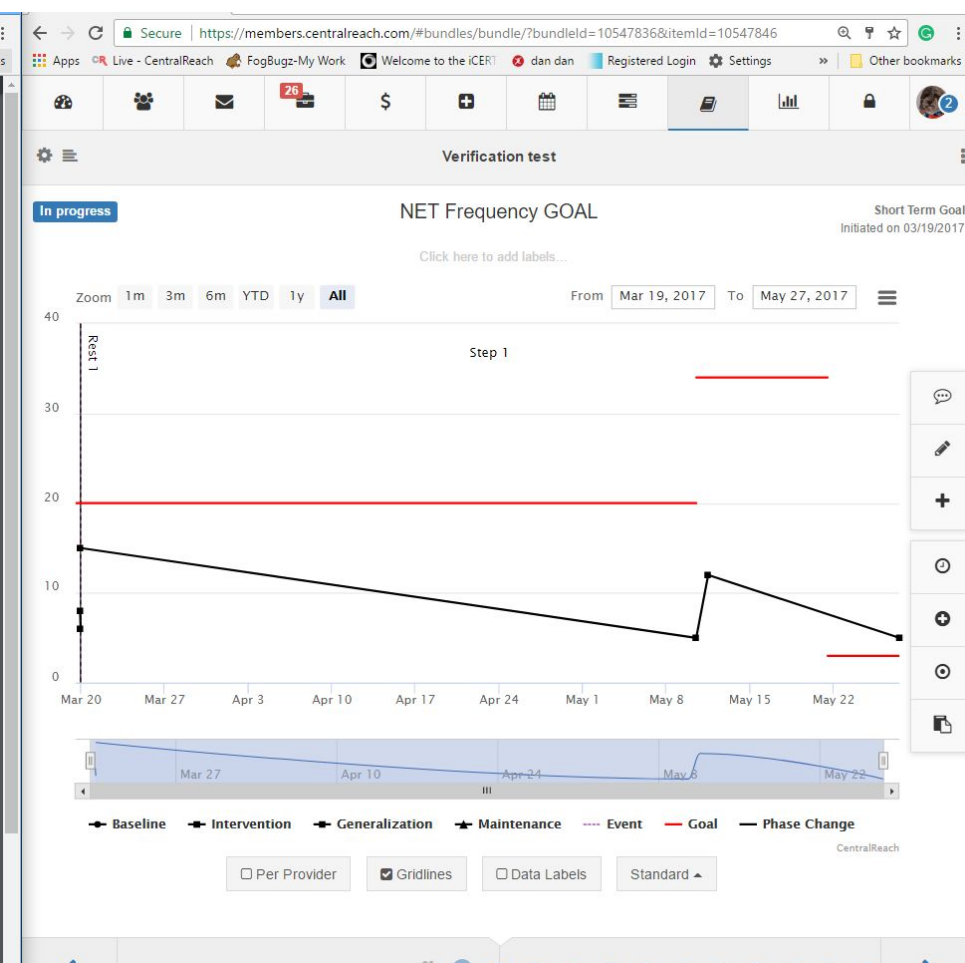
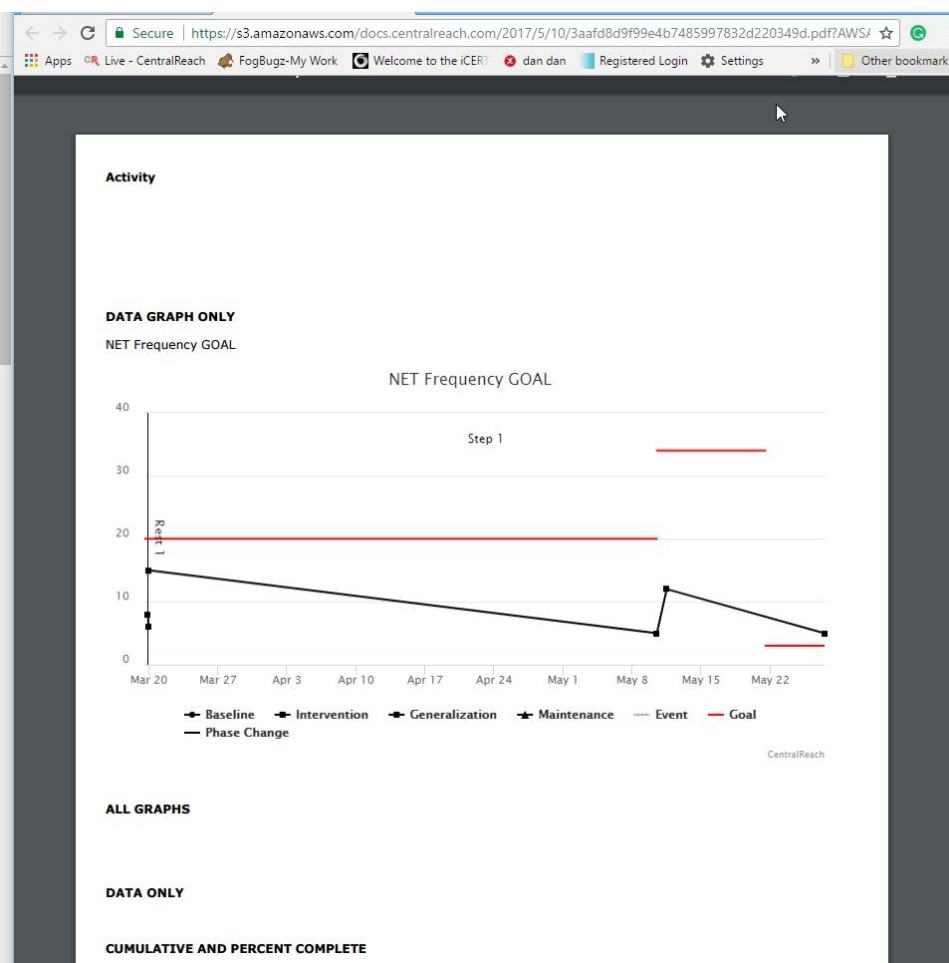
Description

 Screen Shot 2017-05-09 at 1.10.00 PM.png	48.33 KB		
 Screen Shot 2017-05-09 at 1.07.06 PM.png	29.12 KB		
 Screen Shot 2017-05-09 at 12.53.16 PM.png	32.64 KB		
 Screen Shot 2017-05-09 at 12.19.14 PM.png	44.85 KB		

[Help Article](#)

Multiple Goals on one Graph

- Users can now add multiple goals to a branch and see them in the same graph
- Allows users to change criterion and see results in one graph



Custom Tables in Notes Templates

- Can alter the column and row size of custom table in templates by dragging
- Additional table options
- Cannot alter table in notes creation. Only in template

The screenshot shows a web browser window with the URL <https://feature-36767-update-tinymce.dev.centralreach.com/#notes/templates/?mode=edit&search=center%20table&id=1305>. The browser's address bar shows the page is secure. The page title is "Therapy". The browser's address bar shows the page is secure. The page title is "Therapy". The browser's address bar shows the page is secure. The page title is "Therapy".

The main content area shows a table editor interface. The table has columns for "NAME |" and "Last" and rows for "1", "2", "3", "4", "5". A red box highlights a toolbar with table options, and another red box highlights a text area with the text "User will be able to resize the column or the row".

More option for tables