



S O A P w a r e<sup>®</sup>

## **Release Notes**

**Release Notes**

<b>1</b>	<b>Release Notes</b>	
1.1	SOAPware 2012 Release Notes	4
<b>2</b>	<b>Archived Release Notes:</b>	
2.1	SOAPware 2011 Release Notes	16



# Release Notes



## SOAPware 2012 Release Notes

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### 2012 New Features

If you would like to view a list of the new features available in 2012, please see: [2012 New Features.](#)

### 2012.0.7115 Release Notes

#### Meaningful Use

- Resolved issue with Medication Reconciliation counting non-face to face encounters
- Resolved issue with NQF 0041 and CPT Code G8482
- Resolved issue with NQF 0002 and patients turning 19 during the reporting period

#### Rx Manager

- Resolved issue with submitting prescriptions through Rx Manager after Refilling a med from the History tab
- Resolved issue with submitting prescriptions through Rx Manager after adding a med from the Medications tab
- Resolved issue with selecting a newly added pharmacy in Rx Manager

#### SMARText

- Resolved issue with the cursor not moving to the right position after using Ctrl + ] and an arrow key
- Resolved issue with the page not scrolling down while using Ctrl + ] to navigate through a SMARText document
- Resolved issue with Ctrl + Delete deleting an entire SOAP/Summary field
- Resolved issue with using Shift and Clicking to highlight text in a SMARText document
- Resolved issue with the cursor jumping after using Copy and Paste in a SMARText document
- Resolved issue with inserting docuplates causing extra lines to be inserted at the end of a SMARText document

#### Chart Rack

- Resolved issue with typing the month of a birthdate in Chart Rack
- Resolved issue with Chart Rack ignoring special characters in the search field

#### Miscellaneous

- Added multiple improvements to memory management of SOAPware





- Resolved issue with saving changes made to files opened externally from SOAPware
- Resolved issue with the F2 and T2 CPT modifiers and their descriptions

#### Practice Management

- Resolved issue with Statements pulling wrong phone number
- Resolved issue with Production by Procedure Report not including current day procedures

### 2012.0.6022 Release Notes

#### Demographics

- Resolved issue with Demographic changes reverting back by using the Set Default Pharmacy button in Rx Manager with a certain workflow

#### SOAPwareXchange

- Resolved issue with the provider ID not being inserted into Superbill files

#### Custom Reporting

- Resolved issue with Custom Reporting timing out during long searches

#### NQF Measures

- Resolved memory management issue when a facility was not selected in Scheduler while exporting NQF measure results

### 2012.0.5044 Release Notes

#### Performance Improvement

- Improved performance when signing off documents in a chart with lots of images
- Improved performance when closing SOAPware using the X button

#### Meaningful Use

- Resolved issue with NQF 0024
- Resolved issue with NQF 0031
- Resolved issue with NQF 0038
- Resolved issue with NQF 0062
- Resolved issue with NQF 0070
- Resolved issue with NQF 0081
- Resolved issue with NQF 0083
- Resolved issue with NQF 0089



- Resolved issue with NQF 0387
- Resolved issue with the date range in export file for Year To Date snapshots
- Resolved issue with Clinical Summaries credit being given to the active provider instead of the SOAP Note owner
- Implemented memory management improvement during statistics calculation to resolve out of memory errors during MU statistics calculation

#### Practice Management

- Resolved error with Duplicate Report when using PostgreSQL 9.0
- Resolved timeout error when running PM reports on large databases
- Added 2013 HCPCS and CPT Modifiers

#### Demographics

- Resolved issue with Demographics of a chart being overwritten by Demographics of a patient account in a specific workflow

#### SOAPwareXchangeHL7

- Pathology and Radiology reports imported through SOAPwareXchangeHL7 now correctly display the Collection Date at the top
- SOAPwareXchangeHL7 will now ignore certain file types inside the Source folder that are not HL7 files

#### Miscellaneous

- Resolved issue with immediate changes not saving after appending a document and cancelling the task creation
- Resolved image annotations issue with the selected tool changing back to the cursor after each use
- Implemented memory management improvement throughout various windows in SOAPware
- Resolved issue with Encounter Viewer not displaying all previous encounters when switching to an older encounter in the chart
- Resolved issue with Handouts not being printed to the correct printer when printing through a document design
- Resolved an issue with extraneous audit log data
- Added additional error logging to help identify a problem with Summary documents



## 2012.0.3063 Release Notes

### SOAPwareXchangeHL7

- Resolved issue with deleting mappings in Remote Management Utility
- Added support for certain HL7 version 2.5 message segments

### SOAPwareXchange

- Resolved issue with importing PDF's into the SOAP Note section

### Meaningful Use

- Resolved intermittent issue with exporting patient records to PDF
- Resolved issue with clinical summaries measure and removing encounters

### Patient Loader

- Resolved issue with patient loader count

### Practice Management

- Improved memory management issue in Patient Account
- Resolved issue with Box 33 A & B on CMS 1500 form with override group values selected
- Resolved issue with statement reports and inactive providers
- Resolved issue with statement reports on large databases
- Resolved issue with SV101-7 element on electronic claims
- Resolved issue with the Production by Procedure report not calculating correctly for charges with multiple units
- Resolved issue with the maximum length of CPT code descriptions
- Updated F9/Remove Unused Items functionality to no longer remove billing data in CPT codes

### Miscellaneous

- Resolved issue with online RX history items not displaying immediately
- Resolved multiple issues with patient Formulary information
- Resolved multiple issues with patient Rx Eligibility information

## 2012.0.1025 Release Notes

- Resolved memory management issue in Patient Account.



## Patient Portal Update - July 27, 2012

- Resolved login issue with a registered patient after un-enrollment and re-enrollment.

## 2012.0.1019 Release Notes

- Resolved issue with two users editing SOAP Notes in the same chart at the same time
- Resolved compatibility issue with latest Data Manager and PGAdmin
- Resolved issue with patient statements reflecting credit adjustments in the Current Balance field.
- Updated the Structured Labs measure denominator calculation to no longer include HL7 labs that did not contain structured data
- Resolved issue with running Data Manager Maintenance manually after scheduling Maintenance
- Resolved issue with checking RX Eligibility

## 2012.0.331 Release Notes

- Resolved issue with V4 Data Converter
- NQF 0075 calculation has been expanded
- Total Charges & Balance Due fields on CMS 1500 form now will be the sum of items 1-6 per page instead of the total for entire claim if the claim has more than 6 items and is split across multiple pages
- Resolved issue with Patient Loader Utility when processing comma delimited text files
- Added performance measure exclusion modifiers consisting of 1P, 2P, 3P and 8P
- Resolved issue with ending zeros after a decimal point on unit values when submitting claims

## 2012.0.313 Release Notes

### Practice Management

- Added ability to re-select None for eligibility qualifier in Insurance Company setup after selecting an initial eligibility qualifier
- End of Month report now matches calculations and numbers in the End of Year report
- Resolved issue with the Production by Procedure report when referring provider was selected
- Resolved issue with the CMS 1500 form pulling the insurance policy phone number
- Resolved issue with the CMS 1500 form not calculating the Balance Due field correctly
- Resolved issue with More Info on a New Visit allowing owner and facility to be blank



- End of Month report now only reports provider values and not group and summary values when a single provider is chosen
- Resolved issue with field 17A(Referring Provider) on paper claims
- Resolved issue with End of Year group summary values
- Resolved issue with not being able to re-select the current year in the End of Month dialog

#### SOAPwareXchange

- Resolved issue with posting empty superbills
- Resolved issue with custom demographic fields being overwritten in SOAPware from blank entries in a SOAPwareXchange demographics file
- Resolved issue with importing insurance demographics that relate to an insurance company without a zip code in SOAPware

#### SOAPwareXchangeHL7

- Resolved issue with file separator character in HL7 files

#### Miscellaneous

- Improved performance when opening charts and patient accounts
- Resolved issue with View Previous Encounters in the By RX and By DX tabs
- Improved memory handling in multiple areas
- Resolved issue with demographics not saving if multiple users are using patient accounts in certain areas at the same time
- Resolved display issue when minimizing SOAPware on Windows 7
- Resolved printing issue when printing Health Maintenance macros in a document design
- Resolved issue with Syndromic Health Surveillance SMARTFlow not running
- Resolved issue with viewing PDF files increasing the size of the Windows temp folder
- Resolved issue with SMARText items not remaining green arrows (trusted)
- Resolved locking issue in Insurance Demographics
- Printing from Order Manager now prints what is displayed in the Plan field
- Added security log entry type for signing off Flow Sheet dates
- Corrected several NQF measure default file names used when exporting
- Resolved issue with encounter type changing upon canceling of docuplate insertion
- Resolved issue with uploading certain SMARText items to the online library
- Resolved issue with Share Charts exporting certain images
- Resolved issue with the ordering of Available Document Designs in Document Designer
- Resolved issue with the ordering of Specialties in Contacts
- Resolved issue with exporting a CCR after removing the sub item of an Allergy type SMARText item



- Resolved issue with viewing billing statement from SOAP Notes section
- Resolved issue with demographics locking with a chart and patient account open at the same time on the same PC
- Resolved printing issue when a specified printer for a document design does not exist

## **2012.0.255 Release Notes**

### **Practice Management**

- Resolved issue when posting manually added charges from the New Charges tab

### **Performance**

- Resolved performance issue with Windows Server 2008 and Remote Desktop Protocol

## **2012.0.217 Release Notes**

### **Practice Management**

- Resolved issue with patients without an account/ledger not being listed in the chart rack
- Improved performance when opening patient accounts
- Resolved issue with Accept Assignment field in paper claims
- Resolved issue with the area code in the Telephone field in paper claims
- Resolved issue with Similar Illness Date in paper claims
- Resolved issue with Medicaid Resubmission Code in paper claims
- Resolved issue with the ReadyArea in Claims Manager recognizing Secondary Paper Claims
- Resolved issue with the Ordering Physician address being sent on electronic claims
- Resolved issue with the PER IC segment being sent on electronic claims
- Added 2012 CPT/HCPCS codes and modifiers
- Resolved issue with the Legacy ID, field 32B, on paper claims not populating correctly

### **Demographics**

- Resolved issue with Social Security Number in Insurance Demographics auto-populating

### **SOAPwareXchange**

- Resolved issue with Phreesia interface

### **Security Manager**

- Resolved issue with date/times on certain audit log entries

### **Document Import**



- Resolved issue with imported documents being incorrectly locked after they were imported

#### Month End Report Improvements

- The date selection tool has changed to a month and year selection instead of the specific day calendar since this report covers the entirety of a month
- The month end report now allows users to choose between posted date and date of service on charges
- The month end report now calculates based on the following logic:
- The report aging is based on all charges that have been posted (for the provider/group selected), and all payments and adjustments that have been posted to those charges, as of the end of the month or the current date, which ever occurs first chronologically. Charges, payments, and adjustments must be posted or applied in the given month to appear in the MTD area and in the given year to appear in the YTD.

\*Note: The End of Year report is currently in development, in order to update the calculations to match the changes made in the End of Month report for the 2012.0.217 release. We will be releasing an update that will show the new calculations. Please be looking for updates to come.

#### Printing

- Resolved printing issue where secondary pages of document designs go to the default printer
- Resolved printing issue with embedded images in documents

### 2012.0.186 Release Notes

- Resolved important issue with auto-update utility

#### Also includes 2012.0.182 changes:

- Resolved Rendering Provider field claims issue
- Resolved Update issues that caused errors during database updates for some customers
- Resolved F5 issue where people could not use F5 to insert a docuplate
- Resolved scanning problem in the Custom and Insurance tabs in the Patient Account
- Resolved Prior Authorization field issue in paper claims
- Resolved Referring Provider field issue in paper claims
- Resolved Patient balance issue in top right of patient account
- Resolved issue that caused problems in the Patient AR, Carrier AR, custom report and patient statements



## 2012.0.175 Release Notes

### Demographics

- Notes section of Demographics display issue resolved
- Resolved issue with patient pictures when importing and exporting charts
- Resolved issue with re-enrolling patient onto patient portal
- Resolved issue with Demographics macros from Document Designer not pulling latest data
- Phone number correctly populates in new insurance policy field

### SOAPwareXchange

- Resolved issue with SOAPwareXchange processing empty demographic fields
- Insurance company data during processing will now check for a matching insurance company instead of always creating new companies
- SOAPwareXchange processes gender in insurance policy correctly now
- SOAPwareXchange now ignores dashes and parenthesis when matching phone numbers and zip codes on insurance companies
- Improved handling of improperly formatted REP segments in SOAPwareXchange

### Scheduler

- Scheduler reports now list scheduplate by "Abbreviation Name"
- Resolved intermittent error when deleting blocks in Scheduler
- Resolved issue with using a scheduplate when a conflict arises

### Rx Manager

- Schedule II medication submission setting now saves correctly

### SMARText

- Inserting a SMARText item from SMARText Quick Access correctly increments the usage counter
- Clear Contents button in SMARText Quick Access now disabled if user does not have Update permissions
- Resolved issue with saving drug courses





## CCR

- CCR now lists the smoker status description as well as the code
- CCR now only includes Health Maintenance items that were “performed”

## Data Manager

- Resolved index out of range error during backups
- Data Manager maintenance logging working correctly now

## Meaningful Use

- Scanning into Labs section now prompts user with MU dialog just as importing images does
- Structured Labs measure numerator now counts numeric values regardless of lab test type (numeric range, free text or pick list)
- Expanded calculations for NQF 0018
- Expanded calculations for NQF 0064
- Expanded NQF 0575 measure to include any lab with “a1c” instead of just “Hgb A1c”
- Expanded NQF 0027 measure to allow for easier interpretation of results
- Improved error reporting in Meaningful Use Dashboard

## Miscellaneous

- Search Documentation button now searches SOAPware Screensteps documentation
- Docutainer History now lists document deleted audit log entries
- Resolved error with switching between charts containing PDF files
- Resolved issue with Health Maintenance values being erased with a new column dated in the past
- Resolved issue with storing annotations on embedded images
- Resolved issue with Health Maintenance Document Designer macros
- Resolved error when downloading over an existing SOAP Note docuplate
- Resolved issue with inserting spaces in Add Task window
- Resolved issue with security settings related to deleting SOAP Notes
- Ordered By field in Labs now allows editing
- Resolved issue with installing SOAPware FastStart service without .NET Framework 3.5
- Printing flow sheet values that were populated from a lab docuplate working correctly now
- Resolved issue with printing to the default printer with some printers
- Resolved security issue with RX-Allergy interaction alerts



- Resolved issue with printing embedded images
- Resolved issue with custom SOAP/Summary field header macros in document designer
- Resolved issue with disabling Transaction Logging
- Resolved issue with copying and pasting from Microsoft Word documents
- PatientAccount chart rack now remembers the search type previously selected
- Resolved issue with clinical alerts on SMARText insertion
- Resolved issue when excluding patients through Remote Management Utility

## Practice Management

- Resolved issue with PostgreSQL 9.0
- Resolved issue with adding/editing cents inside payments
- Resolved issue with domain codes deactivating incorrectly
- Resolved issue with correct Insurance Verified information displaying
- Resolved issue with Missing Charges report counting deleted billing statements
- Resolved issue with corrections to claims not saving all fields while posting insurance payments
- Resolved issue with changes not being saved when omitting charges from re-filing, while posting an insurance payment



# **Archived Release Notes:**



## SOAPware 2011 Release Notes

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Patch Release Notes listed at the bottom

### Performance Improvements

- Speed improvements when opening charts.
- Speed improvements when pressing F4 after inserting an order in Order Entry.
- Speed improvements when inserting a SMARTText item in fields containing large amounts of structured text.

### Rx Manager

- Medication Check box is now automatically checked when inserting medications from multiple sections of the Rx Manager before submission.
- Resolved issue with Rx Manager warning when making changes in Demographics.
- Rx transmissions in Rx Manager History tab displays the date and time of submission.
- Rx transmissions in Rx Manager History tab now display the provider name.

### Scheduler

- Improved network connection handling with Scheduler.
- Resolved error when inserting conflicting Schedupdates.

### Other

- Resolved issue with displaying document owners/inactive owners created prior to SOAPware 2010 in charts.
- Resolved issue with launching SOAPware after completing installation.
- Implemented SOAPware Screensteps Documentation links in Help Menu.
- Implemented PDF and image printing for customized handouts. (Print Handouts shortcut code is in Document Designer).
- SOAPwareXchange - Improved data field exporting on empty fields.
- Resolved “jumping cursor” issue when deleting text and pressing enter inside brackets of SOAPnote fields.
- Resolved intermittent errors during SOAPware 4.x data conversions.
- Implemented tool tips in Data Converter on check box options and writes a log file of any errors out to SOAPware directory to a file called Converter\_Errors.txt where it will have a log of



the last conversion ran.

- Resolved issue with printing the security log.
- Improved PDF export in Chart Share; now lists patient name and document info.
- “Remove Unused Items” no longer removes the Modifier and Related DX sub items of ST Plan Items when they are filled in. (This prevented superbills from posting correctly.)
- Improved GIF file import and display.
- Resolved issue with removing signature image for providers when Clicking “Update” in Provider Manager.

## **Practice Management**

### **Performance Improvements**

- Improved Database reporting performance.

### **837p**

- Added the distinction for billing providers of Person (1) and Non-Person (2)

### **Charges**

- Added Note Action for adding note to claims.

### **Charts**

- Made CurrentIIP in Encounters read only because it's now calculated in Billing.
- Current Illness Injury Pregnancy SMARText item changed to be handled on the billing side

### **Claims**

- Added Special Program Codes (837p LOOP 2300 CLM12)
- Added EPSDT Referral (837p LOOP 2300 CRC\*ZZ)
- Added LOOP 2400 NTE support.

### **Claims Manager**

- Fixed a licensing issue with printing paper claims
- Disabled Patient Demographics Area Code and Telephone check from scrubber

### **CMS 1500**

- Fixed for totaling line item total amounts on claims.

### **Facility Manager**

- Added CLIA number entry by facility.



### **Group Manager**

- Added distinction for Entity Type for Person/NonPerson
- Removed CLIA number by Group.

### **Insurance Demographics**

- Fixed issue with editing insurance demographics without having a Clinical Suite license.

### **Insurance Manager - Provider Mapping**

- Added distinction for Entity Type for Person/Non Person)

### **Insurance Payment**

- Fixed default next action for primary claims to "File Secondary Paper".

### **Patient Account**

- Alphabetized Scheduplate list in Scheduling Tab.
- Provide the ability to delete un applied payments prior to applying.
- Added additional check to prevent errors when closing SOAPware with patient accounts open
- Enhanced the balance formatting in the Statements tab of the patient account.
- Fixed PDF preview to match preview in Claims Manager.

### **Patient Archiver**

- Disabled being able to archive a patient with a balance.

### **Reports**

- Fixed an issue related to how insurance payments display on the End of Day Report

### **Scheduler**

- Fixed issue finding open appointment advanced search showing next day for afternoon slots.

### **Superbill**

- Fixed issue related to posting a superbill, if no active Clinical Suite license

## **Data Manager 2011**

- Resolved issue with creating scheduled tasks.
- Microsoft .Net 4 is now included in the Data Manager installer.



## SOAPwareXchangeHL7 2011

- HL7 partial lab reports update the existing reports when the accession number is the same
- HL7 labs using DefaultZPS and DefaultORC interfaces, now correctly pick up providers in the providers copied to field (OBR-28)
- All HL7 interfaces should use the OBR-22 field to read the lab date if there is no data in the OBR-7 field.
- Providers excluded through SOAPwareXchangeHL7 are checked so continuous exclusion of the same provider(s) is not necessary
- Improved Mapping HL7 labs to patients' charts through Remote Management Utility.

## 2011.0.207 Release Notes

- The SOAPware installer was improved to correctly handle the 1720 installer errors.
- Bulk signing of tasks now correctly signs off when multiple document tasks from the same docutainer are selected.
- Scheduler was improved to eliminate locking up.

## 2011.0.224 Release Notes

### Meaningful Use

- The Structured Labs Meaningful Use measure now counts all structured labs regardless of the presence of a face to face encounter.
- The Vital Signs Meaningful Use measure now counts all blood pressure types towards the measure.
- The CPOE Meaningful Use calculation now lists success at more than 30% performed on this measure.
- PQRI measure 0421 requirements have been updated to also include the following parameters:

age 18-64

BMI > or = 25 or < 18.5

### SOAPware

- Resolved an error with Data Explorer searches.
- Summary of Care on Transition of Care can now be used even if a primary provider is not set in demographics.
- Exporting immunization records now supports exporting immunization orders entered through Order Manager.



- Resolved an issue with removing blood pressure, height, or weight from Vital Signs.

#### **Utilities**

- Resolved issue with the Remote Management Utility when excluding or removing unmatched patients.

#### **Practice Management**

- Added support for Spinal Manipulation claims.
- Added primary and secondary referral numbers.

### **2011.0.230 Release Notes**

#### **Meaningful Use**

- Inserting an influenza diagnosis now causes a smartflow alert trigger to help meet the Syndromic Health Surveillance measure.
- The Medical Summary measure no longer unchecks in the MU Patient Dashboard after the date it was performed.
- The Medical Summary numerator now decreases when an encounter is deleted in which it was performed.
- NQF 0062 now searches for all Diabetes Type 1 or Type 2 ICD codes.

#### **SOAPware**

- Resolved an issue with storing demographics.
- Resolved an issue with encounter type locking once a SOAP Note is signed off.

#### **Practice Management**

- Resolved an issue where you cannot delete pre-pays or co-pays that were created as part of a regular payment.

### **2011.0.238 Release Notes**

#### **Meaningful Use**

- Generating Health Maintenance Reports now only adds the Reminder Given status to the rule or rule sets selected when the report is generated.
- NQF 0421 now exports two numerators and denominators representing both required patient populations. [Click here to view the documentation for NQF 0421](#)