

Connect Documentation

About Connect Help

Welcome to Connect, a platform consisting of multiple applications used for managing elements related to medical billing.

The Help Documentation guides you through using Connect via topics which provide:

- Page, window, and field definitions
- Step-by-step guides for common system processes
- Links to helpful training videos and support documentation
- Access to current and past release notes

Connect Help is currently under construction. Additional topics are forthcoming and will be added to the site as they are written.

What's New?

The latest Connect release is 21.6. Highlights of this release include the following:

Accounts

- Updated the AR grid to display the correct **Payment Type** for all Guarantor, Insurance, and External Collection payments.
 - If no **Payment Type** exists, it will display as *Check*.
 - The **Payment Type** cannot be changed after the payment has posted.
 - Updated Credit Card payments to display as *Credit Card*.
- A **Type** filter was added to the **Account / Notes** tab to differentiate between different note types, including *Collection* notes.
- Fixed Issue generating an error message when creating an Account Note and pressing the <BACKSPACE> key.

Adjustment Codes

- Fixed issue causing the **Effect** column to display blank on the **Adjustment Codes**

Charge Batches

- Added the **Patient Name** to the **Charge Batch / Concurrency Log / Anesthesia Case Provider Time** table to provide users quick visual reference to the information when reviewing the Concurrency Log.
- Updated the logic on Charge Batches to allow accounting dates to be entered for a date up to 14 days in the future.

Charge Entry

- Fixed issue generating an error message when updating **Directed Provider Time** on a case and trying to save the changes.
- Fixed issue preventing users from saving a **Case Hold Reason** on a case if no note is entered.

Code Updates

- Updated Diagnosis Codes.

Collection Letters

- Added the ability to delete collection letters from the **Collection Letters**
- Added the Collection Letters *Delete* permission to the **Role** page for Back Office.

Support Documentation

Latest Training Tutorials

Some Help topics include video tutorials, tip sheets, or how-to-guides, which provide visual, step-by-step instructions on how to complete the task. Click one of the links below to access the topics with related materials.

Scroll to the bottom of the linked page to find the associated video or document.

- [Release-specific webinars](#)
- **Accounts**
 - [Rebill 1 Switching Primary with Payments Posted](#)
 - [Rebill 1 Switching Primary](#)
 - [Rebill 2 Medicare Forwarded Claim](#)
 - [Rebill 2 Missing Secondary](#)
 - [Rebill 3 Void Claim](#)
 - [Corrected Claims \(Paper & Electronic\)](#)
- **Back Office Reports**
 - [Balancing Connect Report Values](#)
- **Charge Entry**
 - [Extreme Age and Emergency Modifier Codes](#)
- **Collections**
 - [Actions & Action Series](#)
 - [Collector Groups](#)
 - [Denial Collections](#)
 - [Insurance Collections](#)
 - [Guarantor Collections](#)
- **Portal Reports**
 - [Understanding Portal Dashboards](#)
 - [Balancing Portal Dashboard Values](#)
- **Report Permissions**
 - [Report Permissions](#)
 - [Configuring Report Permissions and Roles](#)

Collections Admin

- New **Force Collection Action Notes to show as Account Notes** option added to the **Collections Admin / Guarantor Collections** and **Collections Admin / Insurance Collections**. When selected, all collection action notes will automatically display on the **Account / Notes** tab as *Collection* notes.

Collections

- New **Show on Account Notes** option added to the **Create Action** window in Collections. If no enterprise rule or practice rule is set for account notes, selecting this option facilitates adding the note to the **Account / Notes** tab without having to do a copy/paste action.

Denial Management

- Fixed issue causing **Code** and **Description** fields to be disabled for non-Admin users with **View** and **Create** permissions.

Mobile

- Renamed the **Create** and **Delete** buttons on the **Mobile** page to **Add** and **Remove**.

Password Policy

- Validation added to Password Policy to not allow **Reset account lockout counter after** field to be null if the **Account lockout threshold** and **Account lockout duration** fields are populated.

Payers & Plans

- New **Set physical status modifiers to first position** option added to the **Plan / Anesthesia** tab / **Custom Logic** section. If selected, the **Physical Status Modifier** is appended to the first modifier position on both paper and electronic claims.

Modified options and functionality in the **Plan / Claims** tab / **Plan Claim Options** section:

- Procedure record 99100 is appended to the case if the following are true:
 - The **Plan allows extreme age modifier** option is selected for the insurance plan
 - An anesthesia procedure is added to the case
 - The patient is of 'extreme age' (<1 or >70)
 - Procedure 99100 is not already on the case
- Procedure record 99140 is appended to the case if the following are true:
 - The **Plan allows emergency condition modifier option** is selected for the insurance plan
 - An anesthesia procedure is added to the case
 - The case is marked as an 'Emergency'
 - Procedure 99140 is not already on the case

See the **Tip Sheet** for additional detail:



- [Automated Billing - Extreme Age and Emergency Modifier Codes.pdf](#)

Payments

- Fixed issue causing the Insurance Payment form to cut off the **New Balance** and **Collection** columns.

Payment Batches

- Added **Acct Date** field and **Account Date** filter to the **Payment Batches** tab.

Permissions

- Fixed functionality to restrict users with "View Only" permission from saving and applying updates in Admin to:
 - EDC Interface Configuration
 - External Collection Agencies

Refunds

- The prepend text previously added to the beginning of the **Memo** description on a refund check (e.g., *Refund to Insurance, Refund from Suspense*) was removed to provide additional space for displaying more of the specific refund description text.
 - These edits apply to both Print and Reprint functionality.

Report Permissions

- Fixed issue generating an error message when creating a new folder and assigning to a role.
- Fixed functionality to allow addition of Roles to an existing folder.

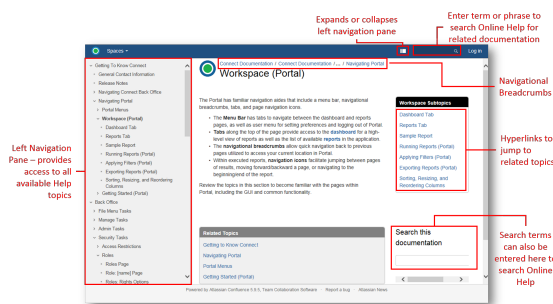
Reports

- **Case Reporting Type** added as a **Group By** search option to the:
 - *Financial Activity Summary (Classic)* report
 - *13 Month Financial Activity (Modern)* report
 - *Payer Mix Summary (Modern)* report
- Fixed issue causing an update to the **Begin Date** of a scheduled report to not save in Portal.

Support Menu

- Added **Email Support** link to the **Support** menu.

To view the full release notes for the current Connect release, click [here](#).



Featured Pages

- [General Contact Information](#)
- [Portal](#)
- [Release Notes](#)

Search this documentation

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