### Document Information

<table>
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<th>K. Sanders</th>
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8.4 Credit Balance Report by Insurance Plan  
8.6 Social Security Number Audit Report |
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1 Release Overview – added bullet about favorite lab tests  
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**Updated:** 3 Intelligence Module – features rolled out over next few months  
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**Updated:** 10.13 New Security – Full EHR Import added as override only  
12 Support – Updated iPad information |
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About this Document

Purpose

This document outlines new and updated features for the 7.3 version release of CareTracker Practice Management 7.0.

Before You Begin

Clear the Cache

You must clear your computer cache prior to logging in to CareTracker for the first time after each new release.

Training & Online Help

Please see the following online help topic for instructions on clearing your cache: CareTracker Online Help > Support > Support Knowledge Base > How to Clear Cache

Document Conventions

This document uses the following formatting conventions:

<table>
<thead>
<tr>
<th>Formatting Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note</strong></td>
<td>Indicates a note about online help, training or support.</td>
</tr>
<tr>
<td>Text in gray borders</td>
<td></td>
</tr>
<tr>
<td><strong>Important</strong></td>
<td>Indicates an important message or warning.</td>
</tr>
<tr>
<td>Text in red borders</td>
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</tr>
<tr>
<td><em>Italics</em></td>
<td>Italics are used to denote paths and cross references.</td>
</tr>
<tr>
<td><strong>Bold</strong></td>
<td>Denotes the name of a CareTracker application element, such a module, application or field name.</td>
</tr>
<tr>
<td>[Placeholder]</td>
<td>Indicates information or a feature that is still under development and not available at this time.</td>
</tr>
</tbody>
</table>
1 Release Overview

This section highlights some of the major enhancements included in this release:

- **Meaningful Use Quality Measure Reports**
  The Reports module has been updated with 12 new clinical quality measure reports as well as an interactive reporting tool to support providers participating in a Meaningful Use EHR incentive program.
  
  See 8.8 *Meaningful Use Quality Measure Reports* on page 23

- **Intelligence Module**
  In the next few months CareTracker will begin rolling out a new business intelligence tool powered by IBM’s Cognos Studio 8.4. The Intelligence module will provide customized reporting capabilities and interactive dashboards for data analysis.

  See 3 *Intelligence Module* on page 12

- **Recreating Favorite Lab Tests**
  Updates to the Orders application require that providers recreate their favorite lab test list. To assist providers with this process, CareTracker has developed a new report that lists the favorite labs and diagnostic imaging tests that were set up by each provider prior to the 7.3 release.

  See 8.7.2 *Favorite Clinical Lab Test by Provider Report* on page 22.

- **User Interface Updates**
  You’ll notice significant enhancements to CareTracker’s user interface. The Dashboard, Administration module, Reports module have all been updated. Enhancements to the Name Bar include a new “At a Glance” patient information window and the ability to search by claim ID.

  See 2 *CareTracker User Interface Updates* on page 9.

- **HealthTracker Pre-Registration**
  It’s now easier to register patients for HealthTracker using the new pre-registration feature. Pre-registration delivers a patient’s HealthTracker invitation via email in stead or requiring a printed activation sheet.

  See 4.1.1 *HealthTracker Pre-registration* on page 13.

- **Appointment Info Window**
  A pop-up information box has been added to the Appointments application to display detailed patient information right from the appointment list.

  See 6.1.1 *Appointment Information Box* on page 19.

- **CareTracker on iPad**
  CareTracker’s core features are now supported on the iPad.

  See 12 *Support* on page 44.
2 CareTracker User Interface Updates

The main CareTracker user interface and several modules have been updated and redesigned to streamline navigation and use. This section details the changes made to CareTracker’s modules, the Name Bar, and patient search.

2.1 CareTracker Module Updates

- The Medical Records module has been renamed Health Record.
- The Document Management application has been added as a module. You can access Document Management from both the left navigation pane and from the Name Bar.
- The order of the modules in the left navigation pane has been reorganized. The Financial module has been moved below Transactions.
- The Dashboard in the Home module has been redesigned and reorganized into two tabs to streamline the workflow. See 5.1 Dashboard Redesign on page 16.
- The Intelligence module has been added to CareTracker. See section 3 Intelligence Module on page 12 for more information.
- The Administration and Reports modules have been redesigned to reflect the new CareTracker style. See section 10 Administration Module on page 28 for more information on changes to the Administration module.

2.2 Name Bar Updates

- The primary care physician (PCP), primary/secondary insurance and last appointment date are displayed above the Name Bar buttons for the patient in context.
- The Auth button has been changed to Refer on the Name Bar. The button launches the Referrals and Authorizations application.
- The Pull icon has been removed. To search, simply press the Enter key after typing the patient’s information in the search box or click the magnifying glass icon to launch the advanced search window.
- The patient’s name now displays in the following order on the Name Bar: last name, first name (preferred name). (Figure 1)
You can access patients that were previously in context by clicking the arrow icon next to the patient currently in context.

Figure 1 Access previous patients

The Help and Documentation links have been moved to a button on the Name Bar. Click the arrow next to the Help button to access the Documentation link.

Figure 2 CareTracker Help & Documentation links

2.2.1 “At a Glance” Patient Information

The patient information hovers on the Name Bar have been replaced with an “At a Glance” patient information window. This window displays patient demographic information (including HealthTracker status), primary/secondary insurance information, primary/secondary copayment amounts, previous and pending appointment details, and provider information.

- Launch the “At a Glance” window by clicking the info icon next to the patient’s name.
- Click the HealthTracker status link to launch the HealthTracker activation tab in the Patient module.
- Click the View Complete Patient Information link to open the Patient Details window (Figure 3).
2.3 Patient Search by Claim ID

You can now use the patient search box on the Name Bar to search by claim ID number. You must type the letter “C” in front of the claim ID number as shown in the example in Figure 4. When the claim number is entered, CareTracker will pull the patient into context and then display the patient’s ID number in the search box.

Figure 4 Patient search by claim ID
3 Intelligence Module

Over the next few months, CareTracker will introduce a new business intelligence tool powered by IBM's Cognos Studio 8.4. The Intelligence module will provide customized reporting capabilities and interactive dashboards for data analysis.

- **Reporting** features give Consumer level users access to a suite of self-service reports while Business and Professional users can author and distribute customized reports. This release includes financial, patient, and appointment reports.

- **Dashboards** communicate real time data as visually rich, interactive charts and graphs. This release includes dashboards for financial, patient and appointment data.

3.1 Intelligence Module User Levels

There are 3 user levels that determine operator privileges in the Intelligence module:

- **Consumer**
  
  All CareTracker users are assigned Consumer level access which allows them to access global reports and reports created by others. CareTracker offers a self-paced training course for Consumer users that introduces Intelligence module basics. See Cognos Training Overview on page 45 for more information.

- **Business**
  
  Business authors can build reports using ad hoc queries, basic calculations and statistical functions. Business authors must complete Cognos Business Author training. See Cognos Training Overview on page 45 for more information.

- **Professional**
  
  Professional authors can develop highly formatted custom reports using multiple queries and advanced calculations. Professional authors must complete Cognos Professional Author training. See Cognos Training Overview on page 45 for more information.

See section 10.13 **New Security** on page 39 for the security privileges required to access the Intelligence module.

**Online Help**

For detailed information, click the Help link in the Intelligence module.
4 Patient Module

4.1 HealthTracker

4.1.1 HealthTracker Pre-registration

An option has been added to the HealthTracker tab in the Patient module that allows practices to pre-register a patient for HealthTracker. When a patient is pre-registered, CareTracker sends an email to the patient containing a link to the practice’s HealthTracker registration page. A registration ID number is not needed, but the patient is required to enter either their practice account number or their last appointment date to verify their identity. Providing the registration information via email instead will simplify the registration process for the patient.

Note: The Pre-Register Patient button is deactivated if an active email address and date of birth are not recorded for the patient in the Demographics application of the Patient module.

If a patient has multiple email address recorded in their demographic record, CareTracker will prompt you to select the address you want to link with the patient’s HealthTracker account.

![Patient has multiple email addresses on File](image)

Figure 5 Patient Module: Multiple Email Address Alert

When a patient is registered in at least one group of a multi-group company, CareTracker automatically registers the patient in the company’s other groups.

4.1.2 Sending Batch Invitations

When you have multiple patients to pre-register for HealthTracker you can send out email invitations in a batch. Additionally, you can also send out batch reminders to patients who were previously invited but have not yet registered. Batch invitations are sent from the Manage Patient Enrollment tab in the HealthTracker setup application in the Administration module. See 10.2.1 Manage Patient Enrollment on page 29.

4.1.3 HealthTracker Registration ID Print Out

The following updates have been made to the HealthTracker registration print out given to patients in the office:
4.2 Pediatric Age Display

CareTracker has a new format for displaying a patient’s age that provides a more specific age value:

- Birth to 6 days is displayed as the number of days. Example: 4/3/2011 (5 days)
- 7 days to 1 month is displayed as weeks and days. Example: 4/3/2011 (2 weeks/ 3 days)
- 1 month to 36 months is displayed as months and weeks. Example: 4/3/2011 (5 months/ 2 weeks)
- 3 years to 21 years is displayed as years and months. Example: 4/3/2006 (5 years/ 8 months)
- 22 years and older is displayed as years. Example: 4/3/1950 (61 years)

4.3 Patient Case

4.3.1 Medicaid of Louisiana

The Case application has been enhanced to enable electronic submission of KIDMED claims to Medicaid of Louisiana. The KIDMED Screening fields (Figure 6) have been added to the Payer Specific Info tab in the Patient Case Detail section of the Case application and in Encounter Specific Info accessed from the Charge application.

Medicaid of Louisiana must be selected as the insurer on the case in order to view the KIDMED Screening fields on the Payer Specific Info tab.
4.3.2 Ordering Provider added to Patient Case

An Ordering Provider field has been added to the patient Case application on the Claim Information tab. The ordering provider is required for some durable medical equipment claims.

4.4 Demographics

4.4.1 Clinical Notes

A Clinical Notes field has been added to the patient demographic record. Notes entered in this field are displayed in the new Clinical Alert window when an operator accesses the patient’s Health Record.

Note

For more information on clinical alerts, please see the CareTracker EHR 7.3 Release Notes.

4.4.2 Validate Email Address Format

CareTracker now validates that the email addresses entered in the Demographic record are properly formatted. CareTracker will display an alert if you try to save the Demographic with an improperly formatted email address.

4.5 Patient Log

CareTracker has been updated to allow practices to audit when an operator views a patient’s unmasked social security number. CareTracker will log an entry to the Patient Log whenever an operator views a patient demographic record that contains an unmasked social security number or when an operator runs or downloads either of the following reports:

- Global - Collection Detail Extract
- Global - Collection Reportv2 Supplement

CareTracker only creates a log entry for operators who have the security privileges to view unmasked social security numbers.
5 Home Module

5.1 Dashboard Redesign

The Dashboard in the Home module has been updated and reorganized on two tabs: Practice and Management. The Practice tab includes the front office, billing and clinical functions while the Management dashboard includes the financial and management functions. Additional dashboard changes include:

- A Show Figures for All Groups checkbox has been added to both dashboard tabs. Select the checkbox to refresh the dashboard and display totals for all of your company’s groups (Figure 7). This field replaces the Show all Groups button.

- The Links hyperlink has been moved to the tab bar all of the Dashboard tabs. (Figure 7)

![Figure 7 Dashboard: Links & Show figures for all groups](image)

- The New Insurance link has been moved from the Front Office section to the Billing section of the Practice dashboard tab.

- The Claim Status heading in the Claims section of the Dashboard has been renamed Open Claims.

- The Time Tracking application has been moved from the Dashboard to the Administration module.

- The Document Management link has been removed from the Dashboard. The Document Management application is accessible from the Doc Mgt button on the Name Bar and by clicking the Doc Management module in the left navigation pane. (See 0
- Document Management Module on page 21.)

![Dashboard redesign](image)

You can set the Management dashboard as your CareTracker home page. Select “Management” from the Home field in the Batch application and CareTracker will display the Management dashboard by default when you log in to CareTracker.

**Online Help**

For more information about the Dashboard, please see the following topic in CareTracker Online Help: Home > Dashboard > Dashboard Overview

### 5.2 Collections

#### 5.2.1 Sort by Statement & Overdue Balance

You can now sort the Collections list by Statement Overdue and Current Overdue balance by clicking the column headings.

#### 5.2.2 Last Activity Date

A Last Activity Date column has been added to the Collections list. You can sort the list by last activity date by clicking the column heading. CareTracker displays the last activity performed when the cursor is placed over the last activity date as shown in Figure 9.
5.2.3 Manually Adding Patient to Collections

When manually adding a responsible party to Collections, CareTracker pulls the patient into context and filters the collections list to show the responsible party for that patient. Deselect the Show only Responsible Party for Patient in Context checkbox to view all collections activity.

Online Help

For more information, please see the following topic in CareTracker Online Help:
Home Module > Dashboard > Practice > Collections

5.3 Messages Center

The following updates have been made to the Messages Center:

- **Printing ToDos**
  
  A Print button has been added to the bottom of the ToDo that allows you print the entire contents of a ToDo from the Messages Center.

- **Mail Message Size**
  
  The maximum size for mail messages has been increased to 31,500 characters.

- **Replying to HealthTracker Emails**
  
  CareTracker displays an alert if an operator tries to reply to a message from a HealthTracker patient whose HealthTracker account has been deactivated.

5.4 News Start and End Dates

The **News** application has been updated to include a start and end date for news items. The start dates determine when a news item will become active and display in the news application. The end date determines when the news item becomes inactive and no longer displays in the news application. If no end date is entered, the news item will remain active.

Online Help

For more information, please see the following topic in CareTracker Online Help: Home > News
6 Name Bar

6.1.1 Appointment Information Box

Based on client feedback, a pop-up information box has been added to the Appointments application to display the following patient information:

- Address and phone numbers
- Balance
- Unapplied payments
- Insurance, subscriber and group numbers
- Insurance balance and copay amounts

The information box appears when the cursor is placed over the patient’s name in the appointment list (Figure 10). When the patient’s name is clicked, CareTracker displays the appointment detail and pulls the patient into context.

Figure 10 Appointment hover

6.1.2 Printing Appointments

A new feature has been added to the Appointments application that allows you to print a detailed report of all the appointments displayed in the Appointment list.

Click the Print Appointments link above the Appointment list to generate a report that includes detailed appointment, patient, financial and insurance information.

You can access the Appointments application from the following locations in CareTracker:

- The Appointments link on the Practice dashboard
Name Bar

- The **Appts** button on the Name Bar
- The **Appointments** tab in Clinical Today

**Online Help**

For more information, please see the following topics in CareTracker Online Help:
- **Name Bar > Viewing Appointments**
- **Clinical Today > Appointments**
- **Home > Dashboard > Practice > Appointments**
7 Document Management Module

The Document Management application is now a module in the left navigation pane. The following updates have been made to the application in this release:

- **Referral Document Sub-Type**
  A new clinical document sub-type "Referral" has been added to the Document Management application. Documents assigned the referral sub-type appear in the Referrals application in the Health Record module.
  Operators can also create custom referral attachment types in the Attachment Types application in the Administration module.

- **Document Viewer**
  The Document Viewer has been enhanced to display Microsoft Word and PDF documents in the viewer. This eliminates the extra click previously required to open the documents outside of the viewer.

**Online Help**

For more information, please see the following topic in CareTracker Online Help:

*Name Bar > Document Management*

8 Reports Module

8.1 Reports Module Redesign

The Reports tab in the Reports module has been updated to reflect the new CareTracker style.

8.2 Month End Reports

The CareTracker logo has been removed from all Month End reports. Month End reports are accessed from Reports module > Financial Reports > Month End Reports.

8.3 Compliance Credit Balance Report

The Compliance Credit Balance report has been updated to generate by service date instead of transaction date. This report lists details for patients with a credit balance. The report is accessed from Reports module > Financial Reports > Audit Reports.

8.4 Credit Balance Report by Insurance Plan

The Credit Balance Report by Insurance Plan has been updated to include the group name and the financial class. The report is accessed from Reports module > Other Reports.
8.5 Compliance Patient Full Adjustment Report

The Compliance Patient Full Adjustment report has been updated to generate transactions for parent company operators only. This report lists patient balances that have been written off. The report is accessed from Reports module > Financial Reports > Audit Reports.

8.6 Social Security Number Audit Report

A new productivity report has been added to audit all social security number look up activity for the past 30 days. The Global - SSN Audit report is accessed from Reports module > Productivity Reports > Other Reports.

8.7 Medical Reports

8.7.1 Medication Sample Report

A new medical report has been added that lists details about medication samples given to patients in case of a recall. The Global - Medication Sample Given Report is accessed from Reports Module > Medical Reports > Other Reports.

8.7.2 Favorite Clinical Lab Test by Provider Report

A new medical report has been added that lists favorite labs and diagnostic imaging tests for each provider.

As a result of updates to the Orders application and the CareTracker compendium, providers must recreate their favorite lab test list in the Orders application. To assist with this process, CareTracker has added the Global - Favorite Clinical Orders Provider report which lists the favorite labs and diagnostic imaging tests that were set up by each provider prior to the 7.3 release.

The Global - Favorite Clinical Orders Provider is accessed from Reports Module > Medical Reports > Other Reports.

Note

Please see the CareTracker 7.3 EHR Release Notes for more information.

8.7.3 Favorite Order Set Reports

As a result of transitioning to the new CareTracker compendium, laboratory and imaging tests included in your saved order sets will not be available with the release. In order to manage this transition, CareTracker is providing the following reports to assist with redefining order sets:

- Global- Favorite Order Sets by Provider
- Global- Favorite Order Sets by Group
- Global- Favorite Order Sets by Company
These reports are accessed from Reports Module > Medical Reports > Other Reports.

### 8.8 Meaningful Use Quality Measure Reports

In this release CareTracker introduces a new interactive reporting tool to assist providers participating in the Medicaid or Medicare Meaningful Use incentive program. These programs provide incentive payments to eligible providers who can demonstrate they’re using certified EHR technology, such as CareTracker EHR, in ways that can be measured in quality and quantity.

The **New Meaningful Use Quality Measure Reports** application provides 24 clinical quality measure reports that allow you to view which patients satisfy the measures for meaningful use as well as troubleshoot the patients who did not satisfy the one or more of the measure qualifiers. This application includes:

- A detailed explanation of the qualifiers patients must meet to satisfy the measure as well as drill-down capability to view the specific codes (CPT, ICD-9, SNOMED, etc.) included in the qualifier.

![Figure 11 Meaningful use reports qualifiers](image)

- You can export the reports in XML format as well as view and print reports in either a summary or detailed view:
  - The **Summary Report** includes the total number of qualified patients, the total number of patients and the percentage of patients that count toward meaningful use.
• The **Details Report** includes the data from the summary as well as the names of the qualified patients and whether or not they satisfied all qualifiers for the measure. For missed cases, CareTracker allows you to view which qualifiers the patient did not satisfy (displayed in red) and then drill down to see the corresponding codes for the missed qualifiers.

![Missed qualifiers diagram](image)

**Figure 12 Missed qualifiers**

**Note:** The reporting logic that determines whether an encounter is included in Meaningful Use Quality Measure reporting requires that an encounter include both procedure and diagnosis codes. You must either create a visit or save the visit as a charge to ensure that the encounter is included in Meaningful Use Quality Measure reporting.

To access the New Meaningful Use Quality Measure reports, you must have either the **MU2011-QM Reports** override included in your operator profile or you must be assigned one of the following operator roles:

• Fin- Reporting Only
• Fin- Billing Management
• Fin- Practice Administrator

**Online Help**

For more information, please see the following topic in CareTracker Online Help:

*Reports > Medical Reports > New Meaningful Use QM Reports*
8.8.1 New Meaningful Use Quality Measure Reports

Table 1 describes the new Meaningful Use Quality Measure reports added in this release. These reports are accessed from the New Meaningful Use QM Reports link in the Medical Reports section of the Reports module.

Table 1 Meaningful Use Quality Measure Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NQF001 Asthma Assessment</td>
<td>Percentage of patients aged 5 through 40 years with a diagnosis of asthma who were evaluated during at least one office visit within 12 months for the frequency (numeric) of daytime and nocturnal asthma symptoms.</td>
</tr>
<tr>
<td>NQF0012 Prenatal Care: Screening for Human Immunodeficiency Virus (HIV)</td>
<td>Percentage of patients, regardless of age, who gave birth during a 12-month period who were screened for HIV infection during the first or second prenatal visit.</td>
</tr>
<tr>
<td>NQF0014 Prenatal Care: Anti-D Immune Globulin</td>
<td>Percentage of D(Rh) negative, unsensitized patients, regardless of age, who gave birth during a 12-month period who received anti-D immune globulin at 26-30 weeks gestation.</td>
</tr>
<tr>
<td>NQF0047 Asthma Pharmacologic Therapy</td>
<td>Percentage of patients aged 5 through 40 years with a diagnosis of mild, moderate, or severe persistent asthma who were prescribed either the preferred long-term control medication (inhaled corticosteroid) or an acceptable alternative treatment.</td>
</tr>
<tr>
<td>NQF 0055 Diabetes Eye Exam</td>
<td>The percentage of patients 18–75 years of age with diabetes (type 1 or type 2) who had a retinal or dilated eye exam or a negative retinal exam (no evidence of retinopathy) by an eye care professional.</td>
</tr>
<tr>
<td>NQF0056 Diabetes Foot Exam</td>
<td>The percentage of patients aged 18-75 years with diabetes (type 1 or type 2) who had a foot exam (visual inspection, sensory exam with monofilament, or pulse exam).</td>
</tr>
<tr>
<td>NQF0059 Diabetes HbA1c Poor Control</td>
<td>The percentage of patients 18-75 years of age with diabetes (type 1 or type 2) who had HbA1c &gt; 9.0%.</td>
</tr>
<tr>
<td>NQF0061 Diabetes Blood Pressure Management</td>
<td>The percentage of patients 18-75 years of age with diabetes (type 1 or type 2) who had BP &lt; 140/90 mmHg.</td>
</tr>
<tr>
<td>NQF0062 Diabetes Urine Screening</td>
<td>The percentage of patients 18–75 years of age with diabetes (type 1 or type 2) who had a nephropathy screening test or evidence of nephropathy.</td>
</tr>
<tr>
<td>NQF0064 Diabetes LDL Management Control</td>
<td>The percentage of patients 18–75 years of age with diabetes (type 1 or type 2) who had LDL-C &lt;100mg/dL.</td>
</tr>
<tr>
<td>NQF0070 Coronary Artery Disease (CAD): Beta Blocker Therapy for CAD Patients with Prior Myocardial Infarction</td>
<td>Percentage of patients aged 18 years and older with a diagnosis of CAD and prior MI who were prescribed beta-blocker therapy.</td>
</tr>
<tr>
<td>NQF0084 Heart Failure (HF): Warfarin Therapy Patients with Atrial Fibrillation</td>
<td>Percentage of all patients aged 18 and older with a diagnosis of heart failure and paroxysmal or chronic atrial fibrillation who were prescribed warfarin therapy.</td>
</tr>
</tbody>
</table>

To access the New Meaningful Use Quality Measure reports, you must have either the MU2011-QM Reports override included in your operator profile or you must be assigned one of the following operator roles:
8.8.2 Updated Meaningful Use Quality Measure Reports

The following Meaningful Use Quality Measure reports have been updated with the latest parameters established by the National Quality Forum (NQF):

- NQF 0013 - Hypertension Blood Pressure Measurement
- NQF 0024 - Weight Assessment and Counseling for Children and Adolescents
- NQF 0031 - Breast Cancer Screening
- NQF 0033 - Chlamydia Screening for Women
- NQF 0038 - Childhood Immunization Status
- NQF 0043 - Pneumonia Vaccination Status for Older Adults
- NQF 0018 - Controlling High Blood Pressure
- NQF 0028 - Preventive Care and Screening Measure Pair: a. Tobacco Use Assessment, b. Tobacco Cessation Intervention
- NQF 0032 - Cervical Cancer Screening
- NQF 0034 - Colorectal Cancer Screening
- NQF 0041 - Preventive Care and Screening Influenza
- NQF 0421 - Adult Weight Screening and Follow-Up

These reports are accessed from both the Meaningful Use QM Reports link and the New Meaningful Use QM Reports link in the Medical Reports section of the Reports module.
9 Connections Module

9.1 Available Connections

The Connections module now includes a list of facilities that have an interface with CareTracker. The Available Connections menu lists the following:

- Lab Interfaces
- Imaging Report Interfaces
- Pathology Interfaces
- EHR
- Transcription

To utilize one of CareTracker's available connections, send a ToDo to your support entity.

Online Help

For more information, please see the following topic in CareTracker Online Help: Connections > Available Connections

9.2 Financial Import (DFT)

The financial import has been enhanced to allow operators to force a duplicate encounter when an encounter with charges already exists for an appointment in CareTracker.

9.3 Patient Import (ADT)

The patient import has been enhanced to accept a patient's race and multiple patient addresses.
10 Administration Module

10.1 Administration Module Reorganized

The Administration module has been redesigned and reorganized into 3 tabs: Practice, Clinical and Setup.

Figure 13 Administration module redesign

The following Administration module applications have been renamed:

- Custom Attachment Types is renamed Attachment Types
- Cosignature Maintenance is renamed Cosignature
- Custom Encounter Types is renamed Encounter Types
- Favorite Lab Maintenance is renamed Favorite Labs
- Order Set Maintenance is renamed Order Sets
- Patient Education Maintenance is renamed Patient Education Editor
- Formal Health Record Maintenance is renamed Formal Health Record
- Provider Screening Severity Level Maintenance is renamed Provider Screening
- Provider Signature Maintenance is renamed Provider Signature
The **Time Tracking** application has been moved from the **Dashboard** to the **Practice** tab in the **Administration** module.

### 10.2 HealthTracker

#### 10.2.1 Manage Patient Enrollment

A new tab has been added to the HealthTracker setup application to manage patient enrollment in HealthTracker. From the **Manage Patient Enrollment** tab you can:

- **Pre-register patients for HealthTracker**
  
  You can send individual or batch email invitations to pre-register patients for HealthTracker. When a patient is pre-registered, CareTracker sends an email to the patient containing a link to the practice’s HealthTracker website registration page. A registration ID number is not needed, but the patient is required to enter either their practice account number or their last appointment date to verify their identity.

  If a patient has multiple email addresses saved in their record, CareTracker will send the pre-registration email to the first email address saved in their demographic record. However, when patients are pre-registered for HealthTracker in the Patient module, CareTracker will prompt you to select the address you want to link with the patient’s HealthTracker account.

  **Note:** The **Pre-Register Patient** button is deactivated if an active email address and date of birth are not recorded for the patient in the Demographics application of the **Patient** module.

  See 4.1.1 *HealthTracker Pre-registration* on page 13 for more information on pre-registration.

- **View patients by their HealthTracker status**

  All patients of the practice are listed with one of the following HealthTracker statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active, Not Registered</td>
<td>The practice has activated the patient for HealthTracker (either by pre-registration or by activating the patient and generating a registration ID) and the patient has not completed the registration process in HealthTracker.</td>
</tr>
<tr>
<td>Registered</td>
<td>The patient has completed the registration process in HealthTracker.</td>
</tr>
<tr>
<td>Not Activated</td>
<td>The patient has not been pre-registered or activated (on the HealthTracker tab in the Patient module).</td>
</tr>
<tr>
<td>Deactivated</td>
<td>The patient has been deactivated (on the HealthTracker tab in the Patient module) or the patient removed the practice from their My Practices page in HealthTracker.</td>
</tr>
</tbody>
</table>

- **Identify patients that are ineligible for HealthTracker**

  Use the **Pt Eligible for HT** filter to easily identify any patients who are not eligible to register for HealthTracker. A patient is considered not eligible when they do not have an email address and date of birth saved in their demographic record.
Note: The **Pt Eligible for HT** filter is disabled when the **Registered** or **Deactivated** filter is selected.

Online Help

For more information, please see the following topic in CareTracker Online Help:
*Administration Module > Setup > HealthTracker > Manage Patient Enrollments*

### 10.2.2 Allow HealthTracker Features: Rx Renewals

The **Rx Renewal Request** feature allows you to specify which providers in your group are authorized to approve refill requests submitted by patients via HealthTracker. Only the selected providers will appear in HealthTracker for patients to choose from. Rx Renewal Requests are activated on the **Allow HealthTracker Features** tab in the HealthTracker application.

**Note:** You must select at least one provider to in order to activate the Rx Renewal Requests feature for your HealthTracker website.

![Figure 14 HealthTracker: Rx Renewal Request](image)

HealthTracker prescription renewal requests are accessed from the **Renewals** link on the **Practice Dashboard** in the **Home** module.

Online Help

For more information, see the following topic in CareTracker Online Help:
*Administration Module > Setup > HealthTracker*

### 10.2.3 HealthTracker Appointment Confirmation

HealthTracker’s **Appointment Request** feature has been renamed **Appointments** and has been enhanced to allow practices to send appointment confirmation emails. The confirmation email can be delivered 1 week, 2 weeks or 2 days prior to the appointment. Patients can confirm their appointment in HealthTracker via the confirmation email. Confirming the appointment changes the patient’s appointment status to “Confirmed” in CareTracker.

The **Appointments** feature is activated on the **Allow HealthTracker Features** tab in the **HealthTracker** application.

Online Help
10.3 835 Upload

A new 835 Upload application has been added to the Practice tab in the Administration module. This feature allows an operator to manually upload an ANSI 835 file for an insurance company or private pay. The Processing Queue tab displays the status of the upload and any errors. After upload, the file can be reviewed and posted from the Electronic Remittances application on the Dashboard.

![835 Upload](image)

Figure 15 Administration module: Upload Insurance ERA

Online Help

For more information, please see the following topic in CareTracker Online Help:
Administration Module > Practice > 835 Upload

10.4 Storage Usage Application

A new Storage Usage application has been added to the Practice tab in the Administration module. This application tracks a company’s attachment storage and displays a rolling total for the last 6 months of usage data in a bar graph.
Channel Partners can access two new storage reports that allow you to monitor the file attachments stored in CareTracker. These reports are available in the Channel Partner portal. For more information, see the CareTracker Practice Management 7.3 Internal Release Notes.

**Online Help**
For more information, please see the following topic in CareTracker Online Help: Administration Module > Practice > Storage Usage

### 10.5 Full EHR Import

A Full EHR Import application has been added to the Clinical tab in the Administration module. This application is used to import and map clinical data from third party systems into CareTracker. The Full EHR Import application allows you to import the following clinical data:

- Problem List
- Allergies
- Medications
- Vital Signs
- Immunizations
- Results
- Progress Notes

You must have the Admin - Channel Partner role or the Full EHR Import override included in your operator profile to access the Full EHR Import application.

**Note**
The Full EHR Import application is only available to conversion specialists at this time.

10.6 Link Encounter Types with Appointment Types

Practices participating in a Meaningful Use incentive program can now include or exclude patients from Quality Measure reporting at the appointment level by linking an appointment type to an encounter type. When an appointment is linked to an “Office Visit” encounter type, CareTracker will include that patient appointment in Quality Measure reporting.

The appointment type is linked to the encounter type in the Appointment Types application in the Administration module.

![Figure 17 Appointment Types](image)

When an appointment is accessed from Clinical Today, CareTracker triggers an encounter. If the appointment is linked to an encounter type, CareTracker creates the encounter type linked to the appointment.

If the appointment is not linked to an encounter type, CareTracker creates the default encounter type specified in the Encounter Types application.

**Standard vs. Custom Encounter Types**

You can link either standard or custom encounter types to an appointment.

- If your practice uses custom encounter types, any encounter type flagged as an Office Visit will be included in Quality Measure reporting. You can create an office visit encounter type by selecting the Office Visit checkbox in the Encounter Types application.
If your practice uses CareTracker’s standard encounter types, select the **Visit** encounter type for visits you want to include in Quality Measure reporting. Select the **Other** standard encounter type for visits you want to exclude from Quality Measure reporting.

**Online Help**

For more information, please see the following topics in CareTracker Online Help:
- Administration Module > Clinical > Encounter Types
- Administration Module > Setup > Appointment Types

### 10.7Bulk Visit Import

The **Visit Import** application now allows you to verify the batch and set the transaction date prior to import when Bulk Visits to Charge is activated for the group. The Confirm Batch Information window launches when visits are imported from the Work Unimported tab.
10.8 Immunization Administrator Maintenance

A new **Immunization Administrator Maintenance** application has been added to the **Administration** module. This application allows you to specify which resources can administer immunizations. The resources selected in the maintenance application are displayed in the “Administered By” field when entering an immunization in the **Immunization** pane in the **Health Record** module.
Note: If the operator is flagged as a provider in their operator profile, the provider’s name is selected by default.

Online Help

For more information, please see the following topic in CareTracker Online Help:
*Administration Module > Clinical > Immunization Administrator Maintenance*

### 10.9 Immunization Lots

The following changes have been made to the Immunization Lots application:

- When an immunization lot is marked inactive, the immunizations in that lot are no longer available in CareTracker.
- The standard dose defaults to milliliter (ml).
- You can now sort the following columns on the Immunization Lots screen:
  - Lot Number
  - Immunization
  - Received
  - Expiration
- The application now opens in the current browser window instead of opening in a new browser window.
10.10 Vital Sign Ranges

The Vital Sign Ranges application has been enhanced to allow different vital sign ranges based on age. For example, a practice can enter the normal blood pressure range for an adult patient and then enter a separate normal range for a child.

Additionally, the title on the Add Condition window has been changed to “Normal Range” (Figure 22).

![Figure 22 Vital Sign Ranges - Add Condition](image)

10.11 Build Schedule

When building a new week in the Build Schedule application, CareTracker now prevents users from exceeding the 10 character limit in the Week Short Name field. This will prevent users from receiving a prompt to change the name when saving the new week.

Online Help

For more information, please see the following topic in CareTracker Online Help: Administration Module > Clinical > Vital Sign Ranges
10.12 Operators & Roles

The **ToDo Queues** button has been removed from the **Operators & Roles** application to streamline the application’s workflow. You can still create queues from the **Queues** application on the **Practice** tab in the **Administration** module.

![Figure 23 Operators & Roles: ToDo Queues removed](image)
## 10.13 New Security

Table 3 lists the new security privileges included in this release. If a privilege is not included as part of a CareTracker role, you can add the privilege to an operator’s profile as an override.

<table>
<thead>
<tr>
<th>Module</th>
<th>Security Privilege</th>
<th>Description</th>
<th>Privilege is included in the following CareTracker roles:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>Demographics – Show SSN in Edit Mode</td>
<td>Operators with this privilege can see the patient’s full social security number when editing the patient’s demographic record. Without this privilege, CareTracker masks the patient’s social security number in both view and edit modes.</td>
<td>Fin- Practice Admin</td>
</tr>
<tr>
<td>Reports and Correspondence</td>
<td>Decrypt SSN for Collections</td>
<td>When set to On, this privilege allows the operator to view patients’ full social security numbers in the following collections reports:</td>
<td>Fin- Practice Admin</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Global – Collection Detail Extract</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Global - Collection Reports v2 SSN Lookup</td>
<td></td>
</tr>
<tr>
<td>Medical Records</td>
<td>Break the Glass – Group Specific Access</td>
<td>In the event of an emergency, company level access to group specific areas of the chart may be required. Users who have “Break the Glass – Group Specific Access” privileges will see a “Break Glass icon 🗝️ at the bottom of the left navigation pane. This allows the operator access to an individual chart for that CareTracker session.</td>
<td>Fin- Practice Admin</td>
</tr>
<tr>
<td>Administration</td>
<td>Admin – Storage Usage</td>
<td>Provides access to the Storage Usage application in the Administration module.</td>
<td>Admin- Administrator</td>
</tr>
<tr>
<td>Administration</td>
<td>Admin – 835 Upload</td>
<td>Provides access to the 835 Upload application.</td>
<td>Admin- Administrator</td>
</tr>
<tr>
<td>Administration</td>
<td>Full EHR Import</td>
<td>Provides access to the Full EHR Import application in the Administration module.</td>
<td>Override only</td>
</tr>
<tr>
<td>Administration</td>
<td>Immunization Administrator Maintenance</td>
<td>Provides access to the Immunization Administrator application in the Administration module.</td>
<td>Override only</td>
</tr>
<tr>
<td>Module</td>
<td>Security Privilege</td>
<td>Description</td>
<td>Privilege is included in the following CareTracker roles:</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Connections</td>
<td>Import</td>
<td>Provides the ability to import files in the Connections module.</td>
<td>Override only</td>
</tr>
<tr>
<td>Connections</td>
<td>Interface Exceptions</td>
<td>Allows the operator to view and resolve interface exceptions in the Connections module.</td>
<td>Override only</td>
</tr>
<tr>
<td>Connections</td>
<td>Templates</td>
<td>Allows the operator to access the import templates in the Connections module.</td>
<td>Override only</td>
</tr>
<tr>
<td>Intelligence</td>
<td>Business Author</td>
<td>Provides Business Author level access to the Intelligence module. Operators can run pre-defined queries, save and organize reports and interact with dashboards.</td>
<td>Override only</td>
</tr>
<tr>
<td>Intelligence</td>
<td>Consumer Author</td>
<td>Provides Consumer Author level access to the Intelligence module. Operators can build reports using ad hoc queries, basic calculations and statistical functions</td>
<td></td>
</tr>
<tr>
<td>Intelligence</td>
<td>Professional Author</td>
<td>Provides Professional Author level access to the Intelligence module. Operators can develop highly formatted custom reports using multiple queries and advanced calculations.</td>
<td>Override only</td>
</tr>
</tbody>
</table>
| Intelligence| Financial          | Provides access to the global financial folder and dashboard in the Intelligence module. | • Fin- Practice Admin  
• Fin- Billing Mgmt  
• Fin- Front Desk  
• Fin- Reporting Only  
• Fin- Data Entry  
• Fin- Practice Admin                                                                 |
| Intelligence| Patient            | Provides access to the global patient folder and dashboard in the Intelligence module. | • Fin- Billing Mgmt  
• Fin- Front Desk  
• Fin- Reporting Only  
• Fin- Data Entry  
• Fin- Practice Admin                                                                 |
<p>| Intelligence| Scheduling         | Provides access to the global scheduling folder and dashboard in the Intelligence module. | • Fin- Billing Mgmt                                                                                                       |</p>
<table>
<thead>
<tr>
<th>Module</th>
<th>Security Privilege</th>
<th>Description</th>
<th>Privilege is included in the following CareTracker roles:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Fin- Front Desk</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Fin- Reporting Only</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Fin- Data Entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Fin- Practice Admin</td>
</tr>
</tbody>
</table>
10.14 Referral Network

10.14.1 Referral Network Email

The Referral Network email invitation has been redesigned as shown in the example in Figure 24.

![Referral Network email invitation](image)

Figure 24 Referral Network email invitation

10.14.2 Delivery Confirmation

CareTracker now provides a delivery confirmation for Referral Network invitations. You will automatically receive an email confirmation in the Messages Center to notify you when a provider has opened their Referral Network email invitation.

10.14.3 Messages from Non-CareTracker Providers

Non-CareTracker providers can now send a Referral Network message to a CareTracker provider. Providers outside of CareTracker can now log in to their Referral Network account and send an email with attachments to a CareTracker provider. Previously, non-CareTracker providers could only reply to messages initiated from CareTracker.

Online Help

For more information, please see the following topic in CareTracker Online Help:
Administration module > Setup > Allowed Schedules

10.15 Allowed Schedules

A View Queue link has been added to the Allowed Schedules application in the Administration module. Clicking the View Queue link displays files that are queued for
processing, files currently being processed, files that have finished processing, and any file
errors.

Online Help
For more information, please see the following topic in CareTracker Online Help:
Administration module > Setup > Allowed Schedules

11 Financial Module

This release includes the following claim updates:

- **Individual Claim Status**
  Operators can now apply the Mailed or Printed status to individual claims.

- **NDC Format**
  The spaces have been removed from the NDC number on paper claims for Medicaid of Rhode Island and Massachusetts.

- **Medicaid of Oklahoma**
  CareTracker now includes a secondary reference ID for the rendering provider on claims for Medicaid of Oklahoma.

- **Medicaid of Rhode Island**
  The space has been removed between the qualifier and taxonomy code for Medicaid of Rhode Island claims.

- **Replacement & Voided Claims**
  When UB04 claims are re-billed as replacement or voided claims, CareTracker provides the ability to replace the frequency code (set in the Patient Case Detail) with either a 7 for replacement claim or 8 for a voided claim.

11.1 Claims Update to ANSI 5010

CareTracker claim updates have been made to support the American National Standards Institute (ANSI) 5010 transaction set for Electronic Data Interchange (EDI) transactions.

All health insurers and providers are required to migrate from the ANSI 4010-A1 standard transaction set to ANSI 5010 by January 1, 2012.

11.2 ClaimsManager Eligibility Checks

ClaimsManager now checks patient eligibility before a claims file is generated and sent to payers. If an eligibility check has not been performed in the last 30 days, CareTracker will hold the visit, charge, or claim in the Visits on Hold, Charges on Hold or the Claims Worklist application.
12 Support

12.1 iPad & Internet Explorer 9.0 Support

iPad

CareTracker’s core features are now supported on iPad using the Safari web browser. To enable iPad access in CareTracker, the information hovers have been removed from the Name Bar and replaced with a patient information window that includes detailed copay, insurance, appointment, patient and provider information. The patient information window is accessed by clicking the Patient Information icon next to the patient’s name.

When using CareTracker on the iPad:

- Disable pop-up blocker on your web browser.
- When closing CareTracker, be sure to log out completely by clicking the Log Off link. Do not just close the browser window.

Instructions and recommended settings are available in CareTracker Online Help: Getting Started > CareTracker System Requirements

Internet Explorer 9

This release includes support for CareTracker on Internet Explorer 9.0. Please review the recommended browser settings and system requirements in CareTracker Online Help: Getting Started > CareTracker System Requirements

Internet Explorer 6

CareTracker is no longer supported on Internet Explorer 6. Users are encouraged to update their Internet Explorer browser to version 7, 8 or 9.

Online Help

For information on clearing your cache in Internet Explorer 9.0 and the Safari browser on iPad, see the following topic in CareTracker online help: Getting Started > CareTracker System Requirements
Appendix A  Cognos Training Overview

This section describes the recommended training path for CareTracker Intelligence authors. Visit the Cognos Curriculum page to view all Cognos suggested training paths by role.

Tier 1: Consumer Author Training

CareTracker Intelligence consumer operators will have the ability to run and view reports created by others, interact with dashboards, save reports, schedule reports, output reports to excel, PDF, CSV and manage reports in selected folders.

The following course is recommended for basic consumer users:

<table>
<thead>
<tr>
<th><strong>CareTracker – Advanced Reports</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Description</strong></td>
</tr>
<tr>
<td><strong>Training Type</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Cost</strong></td>
</tr>
</tbody>
</table>

Tier 2: Business User Training

CareTracker Intelligence business authors will have access to all functions of a consumer author in addition to Query Studio. Operators will be able to access portions of CareTracker metadata via a drag and drop interface, create reports using ad hoc queries, build and distribute prompted reports for others that include basic calculations and statistical functions.

The following courses are recommended for business authors:

<table>
<thead>
<tr>
<th><strong>IBM Class – IBM Cognos Connection for Consumers v8.4</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Description</strong></td>
</tr>
<tr>
<td><strong>Duration</strong></td>
</tr>
<tr>
<td><strong>Training Registration</strong></td>
</tr>
<tr>
<td><strong>Cost</strong></td>
</tr>
</tbody>
</table>
IBM Class – The IBM Cognos 8 BI Query Studio: Build Ad Hoc Reports (v8.4)

Course Description
Teaches business authors how to create, modify and organize ad hoc reports. You will learn how to create and format different types of reports, highlight report items using conditional formatting, create filters to focus reports, and apply report templates.

Duration
- Instructor-led online or onsite training: 1 day

Training Registration
- Self-paced eLearning
- Instructor led online training
- Onsite training

Cost
- Self-paced eLearning: $199 per student
- Instructor led online: $700 per student
- Onsite training: depends on group size

Tier 3: Professional User Training

CareTracker Intelligence professional authors will have access to all functions of a consumer and business author in addition to Report Studio. Operators will be able to access all of the CareTracker metadata to design, develop and distribute pixel perfect, highly formatted reports and dashboards including advanced calculations and statistical functions and administration of metadata and security.

The following courses are recommended for professional authors:

IBM Class – IBM Cognos 8 BI Report Studio: Author Professional Reports Fundamentals (V8.4)

Course Description
Designed for report authors to learn report building techniques using relational data models, and ways of enhancing, customizing, and managing professional reports. Attendees will participate in hands-on demos and workshops that illustrate key concepts while learning how to use the product.

Duration
3 days

Training Registration
- Classroom training
- Instructor led online training

Cost
$2,400 per student

IBM Class – IBM Cognos 8 BI Report Studio: Author Professional Reports Advanced (V8.4)

Course Description
Report Studio Fundamentals is a prerequisite for this class. Building on topics learned in the Fundamentals course, the Advanced course is designed for professional report authors to learn advanced report building techniques using relational data models, and ways of enhancing, customizing, and managing
### IBM Class – IBM Cognos 8 BI Report Studio: Author Professional Reports Advanced (V8.4)

<table>
<thead>
<tr>
<th>Duration</th>
<th>2 days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Registration</td>
<td><img src="#" alt="Classroom training" /> <img src="#" alt="Instructor led online training" /></td>
</tr>
<tr>
<td>Cost</td>
<td>$1,600 per student</td>
</tr>
</tbody>
</table>