

COS 5.0.84 Newsletter

Several areas have been addressed and improved in the newest release of COS version 5.0.84. To download this latest COS version, go to our Web site at www.officemate.net, click **Support**, select **COS**, and then select **Downloads**. A current back up of your data is always recommended prior to version updates. If you need assistance with this update, please contact our office at 1.800.942.5353, option 2, option 1, and a mutually convenient time will be scheduled to help you. If you are not currently operating COS version 5.0 and would like to, please contact us to schedule this upgrade.

Maximum Allotments per Insurance

The Maximum Allotment screen (on the Schedule tab) will set an upper limit on an insurance related transaction within COS for benefit calculations and quantities sold. This new function can be activated per insurance plan. Refer to the attachment, MaximumAllotments.doc, for detailed information.

Maximum Allotments [Patient]:

1. Patient's Dollar Benefit → maximum per Category
2. Product Quantity → maximum limit per Category
3. Patient's Material Benefits → maximum per transaction for 'all' material Categories
 - ♦ Frames
 - ♦ Sunglasses
 - ♦ Contacts
 - ♦ Lenses
 - ♦ Solutions
 - ♦ Misc. Items
4. Patient's Professional Services Benefits → maximum for the Category
5. Professional Services Quantity → maximum for the Category

Maximum Allotments [Insurance]:

1. Insurance Plan Reimbursement → maximum per Category
2. Insurance Plan Material Reimbursement → maximum per transaction for 'all' material Categories
3. Insurance Plan Professional Services Reimbursement → maximum for the Category

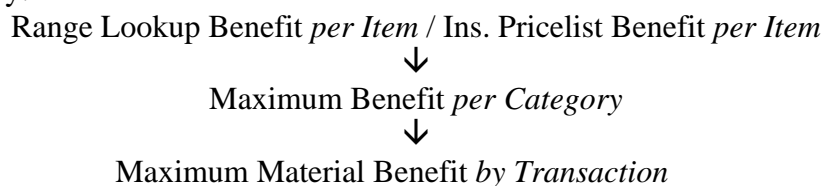
Activation per Plan:

The default preference to activate this maximum allotment is located on each Third Party setup screen → Schedule Tab → Use Category Limits? Y/N

Once this preference is activated, every transaction will be cross referenced with the maximum dollars and quantity fields per category. The multiple choices in setting up a plan to calculate benefits, copays, T/P charges, etc., all still need to be in place. This additional maximum allotment screen works and needs a Range Lookup and/or Insurance Pricelist. Maximum Categories with 0.00 and quantities of zero will receive no funding even though there are item benefits specified.

Hierarchy:

Using a Range Look-Up Category or Insurance Pricelist, COS will look for the patient benefit with the following hierarchy:



Invoice Print-Out

A COS Third Party style invoice can print on either one or two pages. Printing the invoice on two pages allowed a message (up to six lines) to be placed on the lower portion of the first invoice and given to the customer. The second invoice omitted the message as it was originally meant as the office copy. We are now printing the message on both copies, if you are printing the two pages. If your settings are to only print one page of the third party invoice, COS will print the message on the lower portion of the invoice.

Bugs & Fixes

Overdue Account Letters

Under Mailings → Overdue Accounts, if the patient is the Bill Payer, the addressee and salutation on the letter will display the patient's name.

A/R Field on Lab Order

We expanded the field to print all of the description from the inventory card in version 5.0.83, but the SKU number was being shortened and could possibly print another description when looking back at inventory to print → fixed → expanded all 'Other' SKUs within the lab table (on_order.dbf) and the temporary lab table (lotrans.dbf) to adhere to 15 character SKUs.

Lab Orders

Aborting an eyeglass lab order/sale on the invoice screen was periodically leaving behind an orphan lab order in a COS temporary table and then immediately re-entering another order for the same patient; both orders were being displayed → fixed.

Package Pricing

Selecting the "SEND TO CASHIER" option on a transaction that had package items zeroed out correctly for the introduction of the package price were being reintroduced when the cashier pulled up the invoice → fixed. Package pricing is now being respected on a saved invoice sent to the cashier.

Insurance – Contact Exam Benefit Settings

Contact Exam is a sub-category of the Professional Services category when setting up insurance benefits in Allowance Setup, Range Lookup Setup, or Insurance Pricelist Setup. When creating an insurance transaction with a Contact Exam benefit in an Allowance Setup or Range Lookup, the system was looking at Professional Service benefits and not Contact Exam benefits → fixed.

Typing CONTACT or CONTACTS into either the Vendor or Vendor2 field on an inventory item in the Professional Service category will redirect the insurance benefits to look at the Contact Exam field within insurance setups for funding.