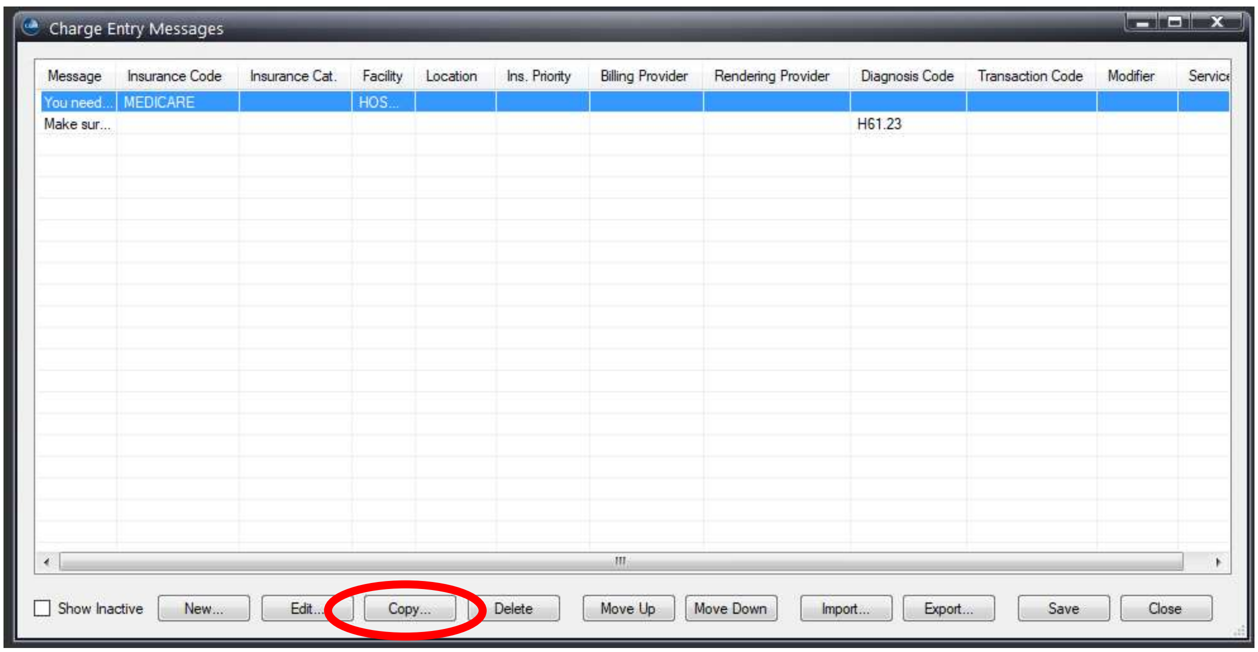
# Lytec 2025

## New Feature Enhancements

## Charge Entry Messages

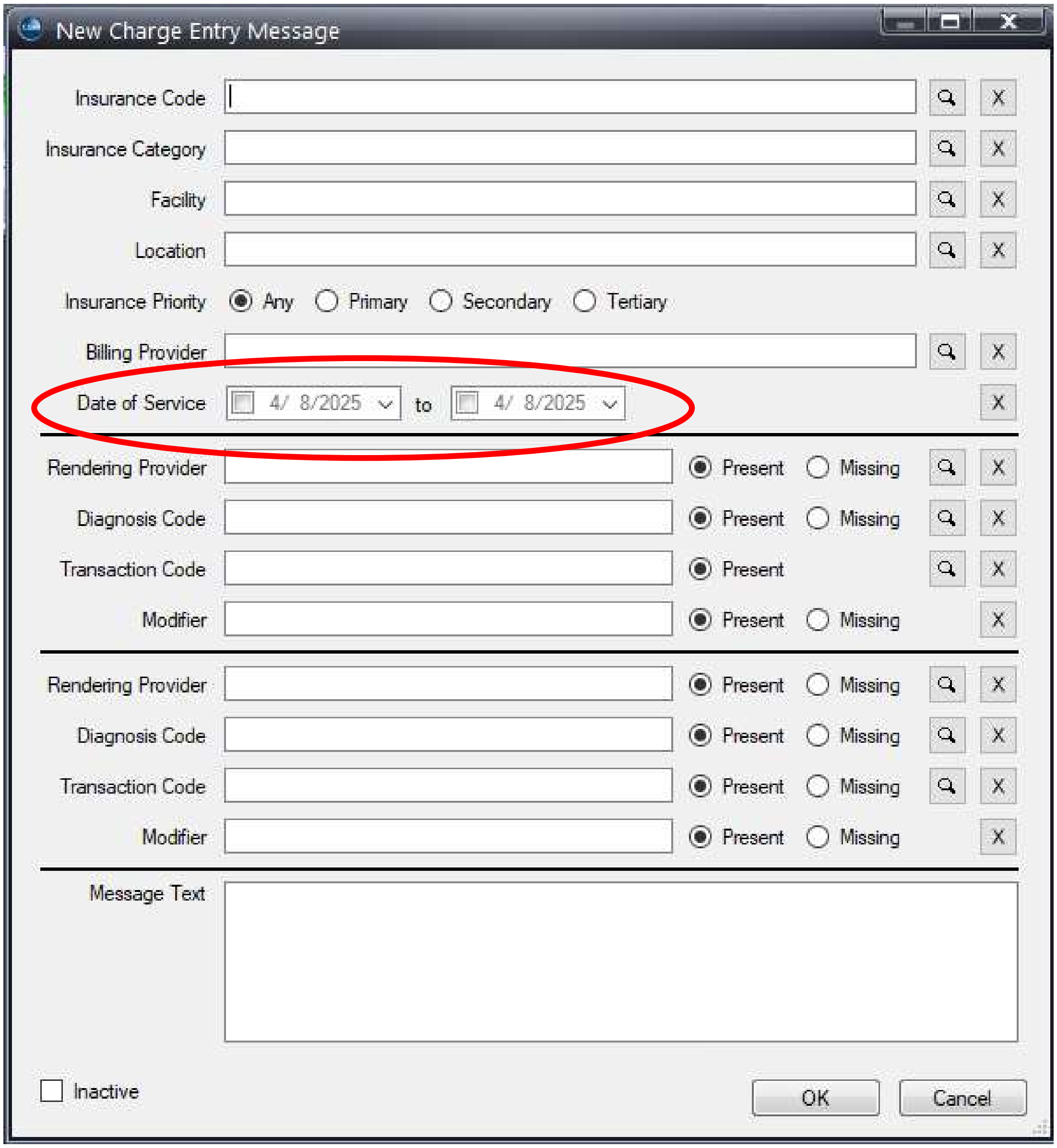
### Copy Button

Charge entry messages can now be copied. By copying existing rules, a user can make simple adjustments to create a new rule.



## Date Filter

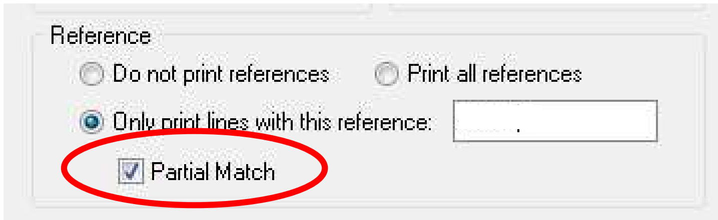
There is now a Date of Service range when creating a charge entry message rule. The column has been added to the main window as well.




To pop up a message on transactions before a certain date, only enter the To date field. To pop up a message on transactions after a certain date, only enter the From date field.

## Reports – Partial Match Option

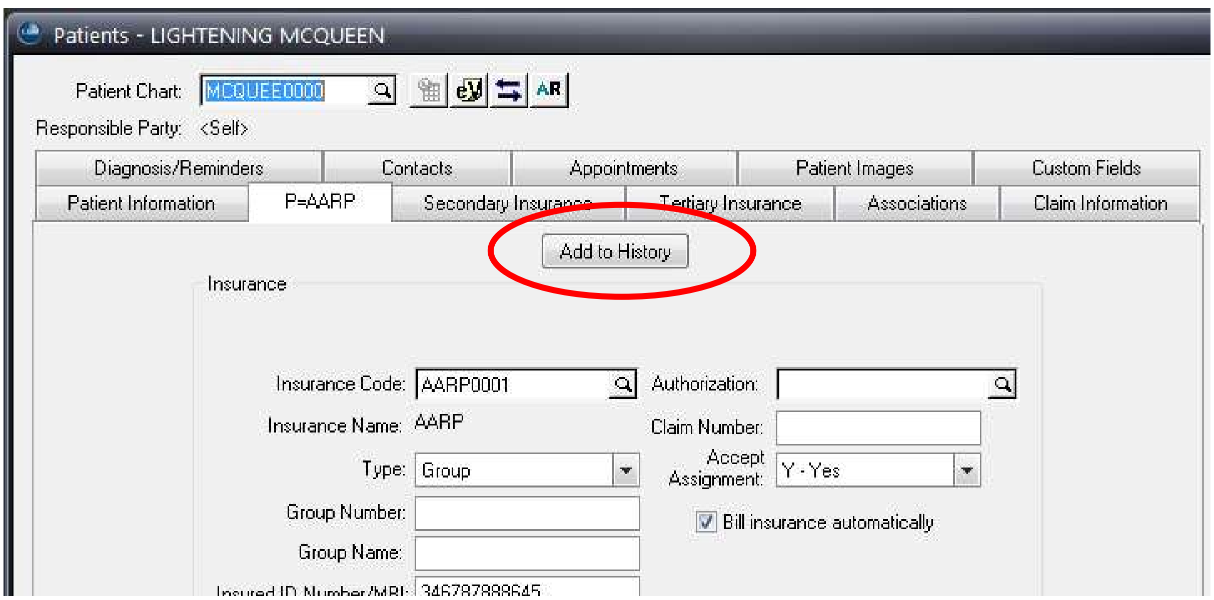
The Transaction Journal, Day Sheet, Patient Ledger and Prepayment Activity reports now have an option to search for a Reference note partial match. The Partial Match option is not case-sensitive.




## Patient Demographics – Insurance History

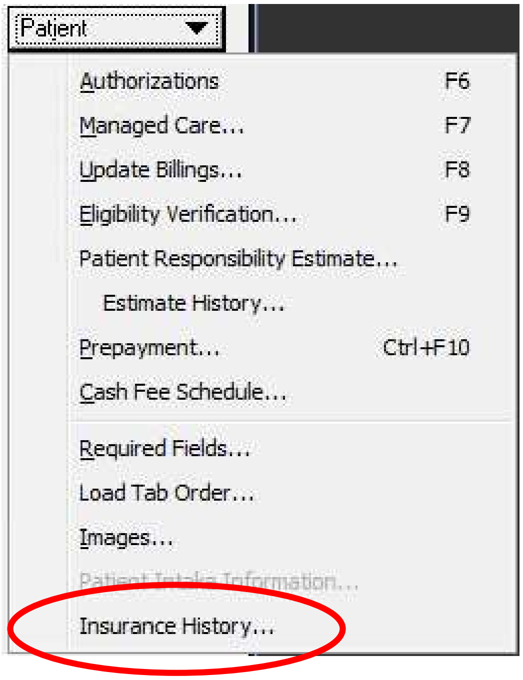
An Add to History button has been added to the Primary, Secondary and Tertiary Insurance tabs. It is recommended a user click "Add to History" after entering the new insurance information each time a patient's insurance is updated. CHS recommends this button is selected on any existing patients so that the current insurance information is added, and the feature can be activated.

NOTE: Make sure to Save the patient AFTER updating the insurance information and BEFORE clicking "Add to History" as the insurance history might not update otherwise.

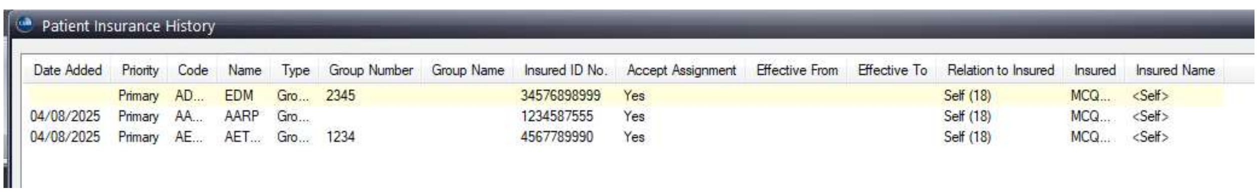



If you accidentally click "Add to History" twice and the software has already saved the information, a pop up will appear notifying you the information has already been saved. You can click OK to close the pop up.

Select Insurance History under the patient button to review the patient's past insurance information.




This screen will provide the date added to the insurance history as well as all other insurance information from the insurance tabs.


Patient Insurance History

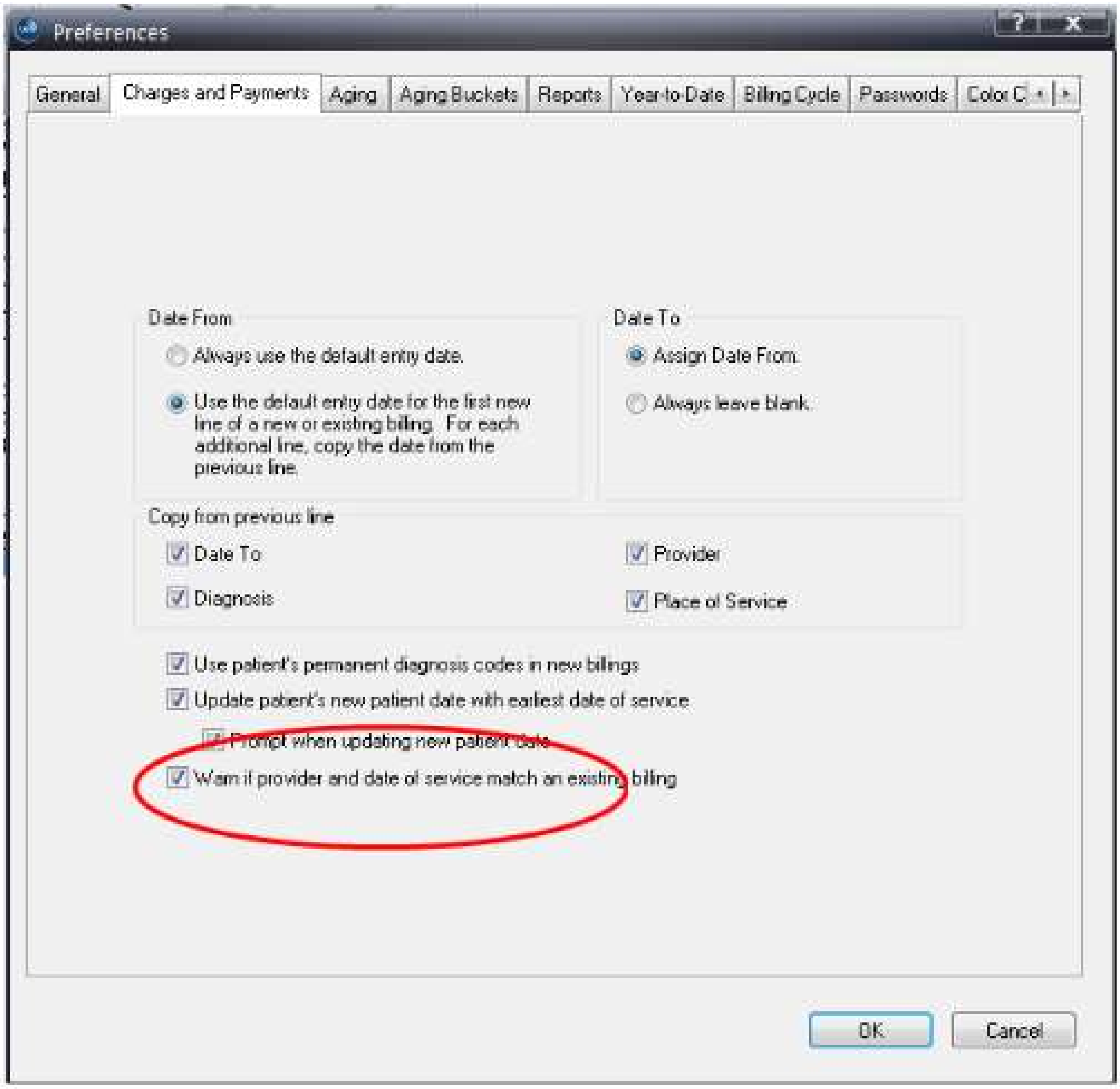
| Date Added | Priority | Code | Name | Type | Group Number | Group Name | Insured ID No. | Accept Assignment | Effective From | Effective To | Relation to Insured | Insured | Insured Name |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Primary | AD... | EDM | Gro... | 2345 | | 34576898999 | Yes | | | Self (18) | MCQ... | <Self> |
| 04/08/2025 | Primary | AA... | AARP | Gro... | | | 1234587555 | Yes | | | Self (18) | MCQ... | <Self> |
| 04/08/2025 | Primary | AE... | AET... | Gro... | 1234 | | 4567789990 | Yes | | | Self (18) | MCQ... | <Self> |

Insurance information can be deleted from the history list if an insurance was added by mistake and saved to the history. The list can also be exported.

## Charges and Payments – New Warning Message

An optional warning message notifying the user of a duplicate bill matching provider and dates of service has been added to Charges and Payments and Pending Transactions. In the message, it will reference the other billing number for the user to review.

This message feature needs to be turned on within the Preferences. To turn this message on, go to Admin > Preferences and select the Charges and Payments tab. Click “Warn if provider and date of service match an existing billing” and then click OK to save.




## Task Scheduler – Eligibility

The eligibility scheduled task will now exclude appointments with the status of Recall, Rescheduled and Canceled.