



Manual del Usuario Actualizaciones



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Patient Receipt

- Luego de realizar *Check In*, al regresar al *Patient Visit Maintenance* tendrá disponible la opción para recibo
- Selecciona la opción *Patient Receipts*, mostrara la pantalla para añadir datos del recibo, entre ellos incluye;
 - o *Amount paid*; cantidad pagada
 - o *Payment method*; drop down incluye alternativas de pago, eg cash, ath-movil, ath, etc
- Finalizado la entrada de datos del recibo, selecciona la opción *Accept and Sign*
- Tendrá opción para añadir pagos adicionales, seleccionando la opción *Patient Receipts*, le mostrará notificación para añadir pago adicional.
- De requerir eliminar un pago, selecciona la flecha donde está la cantidad del pago, le mostrara el detalle del pago. Automáticamente le mostrar la pantalla donde realizo el pago, en el lado derecho tendrá la opción **Void Receipt**

Nota: para realizar *Void* de un recibo, el usuario debe tener acceso en el área de roles

The screenshot displays the 'Patient Visit Maintenance' interface. At the top, there's a blue header with the title and a close button. Below the header, the patient's name 'Testing Medicus | 507' is shown with a dropdown arrow. To the right, there are buttons for 'PATIENT RECEIPTS \$00.00', 'CHECK-OUT', 'ABANDONED', 'ACCEPT', and 'CANCEL (audit)'. A link for 'Pending document queue' is also visible. The patient's DOB is '1/2/1995 | F | 30y/o'. The 'Visit ID' is '0000022275' and the 'Site' is 'Sala 2- Dermatologia'. The 'Arrival Time' is '08:13 AM' and the 'Scheduled' time is 'Walk-In'. The 'Status' is 'Waiting for GeneralMedicine'. There is an 'Open record' button. Below this, there's a 'High Priority' checkbox and an 'Encounter' dropdown set to 'Face to face'. The 'Phone*' is '7875896236'. The 'INSURANCE INFORMATION' section includes 'Type' (Self Pay), 'Insurance', and 'Member ID' fields. The 'VISIT INFORMATION' section includes 'Visit Type' (Botox), 'Visit Reason', 'Attending' (Ricardo Abella), and 'Notes' text area. At the bottom left, there is a link 'Mark as Entered In Error'.

Patient Visit Maintenance ✕

Testing Medicus | 507
DOB: 1/2/1995 | F |
Visit ID: 0000022275
Arrival Time:

High Priority

Encounter:

INSURANCE INFO

Type:

Insurance:

Member ID:

VISIT INFORMATION

Visit Type:

Visit Reason:

Attending:

Notes:

PATIENT PAYMENT ACCEPT AND SIGN | CLOSE

Testing Medicus | 507
DOB: 01/02/1995 | F |
Visit ID: 0000022275 Site: Sala 2- Dermatologia

Amount paid

Payment method

Reference number

Patient notes

Internal notes

ACCEPT | CANCEL (audit)

g for GeneralMedicine

[Mark as Entered In Error](#)

Patient Visit Maintenance

Testing Medicus | 507
DOB: 01/02/1995 | F |
Visit ID: 0000022275 Site: Sala 2- Dermatologia

Amount paid \$ 50.00

NOTIFICATION

 Payment receipt has been successfully saved.

OK

Encounter: Face to face

INSURANCE INFO

Type: Self Pay

Insurance:

Member ID:

VISIT INFORMATION

Visit Type: Botox

Visit Reason:

Attending: Ricardo

Notes:

Mark as Entered In Error

ACCEPT | CANCEL (audit)

g for GeneralMedicine

\$100.00
Cobrar en visita de evaluacion



Instituto de la Piel
 General Medicine & Dermatology
 #36 Corporate Office Park 20Rd. Suite 201
 ASSERTUS Building Suite 102, Guaynabo, PR, 00966
 (787)622-2202/email: medicus.support@assertus.com

BILLED TO	ATTENDING PHYSICIAN	RECEIPT DATE	RECEIPT NUMBER
Testing Medicus 507	Ricardo Abella	08/26/25 08:17 AM	1038

RECEIPT TOTAL **\$50.00**

PAYMENT METHOD Cash

REFERENCE NUMBER 1234

PATIENT NOTE

USER

EKG Procedure

Electronically Signed by doctor.ortiz On 08/26/2025 08:17 AM

Stamp/Signature

Patient Visit Maintenance



Testing Medicus | 507

DOB: 1/2/1995 | F | 30y/o

Visit ID: 0000022275

Arrival Time: 08:13 AM

PATIENT RECEIPTS \$50.00

CHECK-OUT | ABANDONED | ACCEPT | CANCEL

[Pending document queue](#)

[\(audit\)](#)

Site: Sala 2- Dermatologia

Scheduled: Walk-In

Status: Waiting for GeneralMedicine

[Open record](#)

VISIT ACTIVITY

Time	Activity
08:13 AM	Waiting for GeneralMedicine

High Priority

Encounter: Face to face

Phone*: 7875896236

INSURANCE INFORMATION

Type: Self Pay

Insurance:

Member ID:

VISIT INFORMATION

Visit Type: Botox

Visit Reason:

Attending: Ricardo Abella

Notes:

[Mark as Entered In Error](#)

NOTIFICATION

There are \$50.00 in receipt for this visit, do you want to add another receipt

[YES](#) [NO](#)

Patient Visit Maintenance


Testing Medicus | 507
DOB: 1/2/1995 | F | 30y/o
Visit ID: 0000022275
Arrival Time: 08:13 AM
Site: Sala 2- Der
Scheduled: Walk-In

PATIENT RECEIPTS \$50.00 **CHECK-OUT** | **ABANDONED** | **ACCEPT** | **CANCEL**
RECEIPT | **METHOD** | **REFERENCE** | **PAID** | **BY**
 1038 | Cash | 1234 | \$50.00 | doctor.ortiz >
Status: Waiting for GeneralMedicine

High Priority
Encounter: Face to face Phone*: 7875896236
INSURANCE INFORMATION
Type: Self Pay
Insurance:
Member ID:

VISIT INFORMATION
Visit Type: Botox
Visit Reason:
Attending: Ricardo Abella
Notes:

[Open record](#)
VISIT ACTIVITY

Time	Activity
08:13 AM	Waiting for GeneralMedicine

[Mark as Entered In Error](#)

Patient Visit Maintenance


Testing Medicus | 507
DOB: 1/2/1995 | F | 30y/o
Visit ID: 0000022275
Arrival Time: 08:13 AM
Site: Sala 2- Dermatologia
Scheduled: Walk-In

PATIENT RECEIPTS \$50.00 **CHECK-OUT** | **ABANDONED** | **ACCEPT** | **CANCEL**
Pending document queue
RECEIPT | **METHOD** | **REFERENCE** | **PAID** | **BY**
 1038 | Cash | 1234 | \$50.00 | doctor.ortiz >
Status: Waiting for GeneralMedicine

High Priority
Encounter: Face to face Phone*: 7875896236
INSURANCE INFORMATION
Type: Self Pay
Insurance:
Member ID:

VISIT INFORMATION
Visit Type: Botox
Visit Reason:
Attending: Ricardo Abella
Notes:

[Open record](#)
VISIT ACTIVITY

Time	Activity
08:13 AM	Waiting for

PATIENT PAYMENT


Testing Medicus | 507
DOB: 01/02/1995 | F |
Visit ID: 0000022275 **Site:** Sala 2- Dermatologia
Void Receipt

Amount paid \$50.00
Payment method Cash
Reference number 1234
Patient notes EKG Procedure
Internal notes Queda pendiente deducible de \$100.00
 Cobrar en visita de evaluacion

[Mark as Entered In Error](#)

Chronology – Administrative-Receipts

- El historial de recibo del paciente se guardará en el área de Chronology-Receipt
- En esta área vera el historial de recibos que haya realizado **Void**
- Para reimprimir o ver detalle del recibo puede seleccionar el recibo con doble **click**

The screenshot shows the 'PATIENT CENTER' interface for a patient named 'Testing Medicus | 507'. The patient's profile includes their name, DOB (01/02/1995 F 30y/o), phone number (787) 589-6236, and a note about unsigned notes from previous days. The 'PATIENT RECEIPT HISTORY' table is displayed with the following data:

Receipt Date	Receipt #	Payment Amount	Payment Method	Reference Number	Attending Profession	User Name	Patient Note	Internal Note	Is Voided
8/26/2025 8:17:45 AM	1038	\$50.00	Cash	1234	Ricardo Abella	doctor.ortiz	EKG Procedure	Queda pendiente deducible de \$100.00 Cobrar en visita de evaluacion	
8/15/2025 3:05:20 PM	1034	\$50.00	Cash	1234		doctor.ortiz	EKG Procedure		
8/15/2025 12:10:11 PM	1033	\$50.00	Cash	1234		doctor.ortiz	EKG Procedure	quedo pendiente deducible \$100, cobr	
8/15/2025 11:54:45 AM	1032	\$50.00	Cash	123455		doctor.ortiz	Porcedure	pediente \$15	Voided
8/15/2025 11:48:30 AM	1031	\$50.00	Cash	123455		doctor.ortiz	Porcedure	pediente \$15	Voided

The screenshot shows the 'PATIENT CENTER' interface with the 'PATIENT PAYMENT' modal open. The modal displays the following information:

- PATIENT PAYMENT** (PDF | CLOSE)
- Patient: Testing Medicus | 507
- DOB: 01/02/1995 |
- Visit ID: 000022275 Site:
- Amount paid: \$50.00
- Payment method: Cash
- Reference number: 1234
- Patient notes: EKG Procedure
- Internal notes: Queda pendiente deducible de \$100.00
Cobrar en visita de evaluacion

The background shows the 'PATIENT RECEIPT HISTORY' table with the same data as in the previous screenshot. The 'Voided' status is highlighted in red for the last two rows.

Reports-Administrative-Patient Receipt

- En el navegador lado derecho, selecciona la opción de reportes
- Encontrará bajo Administrative el reporte *Patient Receipts*
- Tendrá opción para realizar filtro por; fechas y sites
- Luego de escoger las opciones, selecciona el botón *Run Report* (verde)
- Para imprimir el reporte seleccione *Download* (azul), le mostrara notificación para colocar contraseña para proteger el excel, luego presione ok
- Le mostrara opción para guardar el reporte de manera externa, ejemplo desktop
- Elegido el destino donde guardara su reporte, seleccione ok



Home

Patient Receipts ** [X](#)



AVAILABLE REPORTS



1. Patient Reports

Patient List (with Last Visit and Next Appointment Columns)



2. Clinical

CDS Feedback



Notes



Prescriptions



3. ER

ER Notes (Only for ER Module)

4. Administrative

Future Appointment

Patient Receipts ** new **

User List

5. EPCS

EPCS Medication Audit Trail

EPCS Prescriber Audit Trail

EPCS Prescriptions

REPORTS | Reports Home

Home | Patient Receipts **

PARAMETERS

RECEIPT DATE Today

SITES Every Record

COLUMNS

- ReceiptDate
- ReceiptNo
- PatientName
- RecordNo
- PaymentMethod
- PaymentAmount
- PaymentTime
- Site
- ProfessionalName
- CreatedByUserCode
- ReferenceNo
- PatientNotes
- Void

LIST OF PATIENT RECEIPTS - CONFIDENTIAL
GreatMed Clinic

Requested by: Rafael Ortiz
2025-08-26 09:29 AM

Run Report Download

(Parameters: Receipt Date - Today / Sites - All)

Receipt Date	Receipt No	Patient Name	Record	Payment Meth	Amount	Payment Time	Site	ProfessionalName
08/26/2025	1038	Testing Medicus	507	Cash	\$50.00	08:17:45 AM	Sala 2- Dermatologia	Abella, Ricardo
TOTAL:					\$50.00			

REPORTS | Reports Home

Home | Patient Receipts **

PARAMETERS

RECEIPT DATE Today

SITES Every Record

COLUMNS

- ReceiptDate
- ReceiptNo
- PatientName
- RecordNo
- PaymentMethod
- PaymentAmount
- PaymentTime
- Site
- ProfessionalName
- CreatedByUserCode
- ReferenceNo
- PatientNotes
- Void

LIST OF PATIENT RECEIPTS - CONFIDENTIAL
GreatMed Clinic

Requested by: Rafael Ortiz
2025-08-26 09:38 AM

Run Report Download

(Parameters: Receipt Date - Today / Sites - All)

Receipt Date	Receipt No	Patient Name	Record	Payment Meth	Amount	Payment Time	Site	ProfessionalName
08/26/2025	1038	Testing Medicus				08:17:45 AM	Sala 2- Dermatologia	Abella, Ricardo

Password Protected Excel

Enter the password for the Excel Download

Ok Cancel

Save As

This PC > Documents

Organize New folder

Recordings

This PC

3D Objects

Desktop

Documents

Downloads

Music

Pictures

Videos

Local Disk (C:)

8-ivette_Lago

Custom Office Templates

Downloads

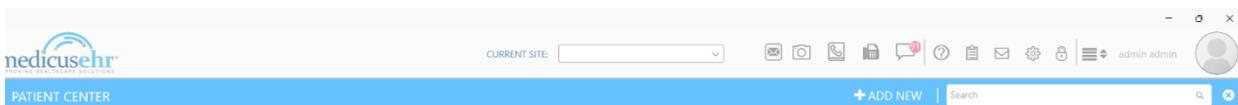
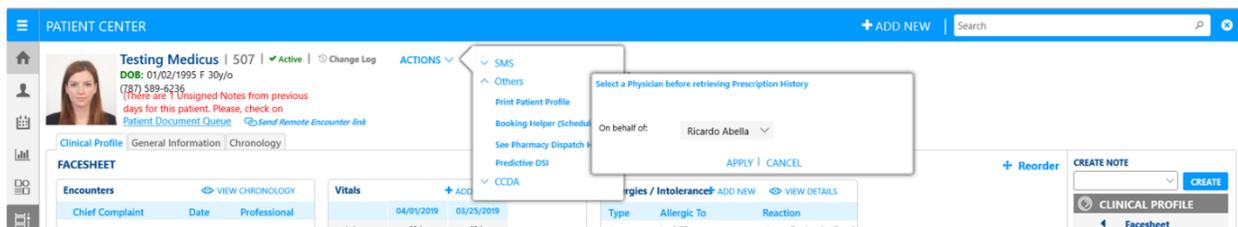
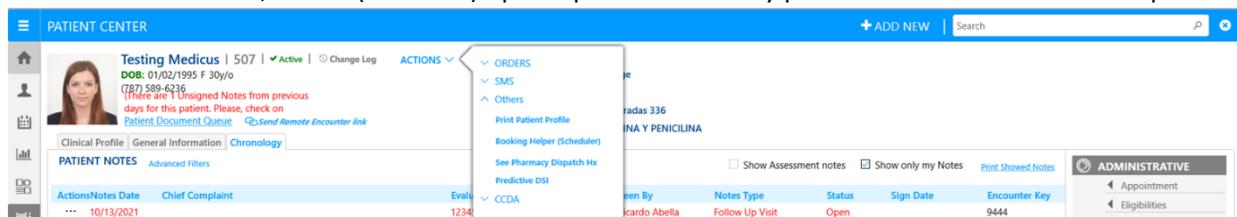
File name: Patient Receipts - 08.26.2025 09.43

Save as type: Excel

Save Cancel

Pharmacy Dispatch Hx (mejoras)

- En *Actions* se modifica el nombre *Medication Hx* por *See Pharmacy Dispatch Hx*
- Usuario que no sea profesional podrá escoger el *Prescriber*, al seleccionarlo podrá ver datos de 12-18 meses de prescripciones del paciente
 Nota: solo podrá escoger entre los Profesionales que tienen activo la configuración con *Surescript*
- Luego de seleccionar el Profesional, debe seleccionar *Apply*
- Automáticamente le mostrara la lista de medicamentos que el paciente haya adquirido en farmacia
 Nota: esta lista de medicamentos no se limita a los que el medico ha prescrito
- Si el medicamento no está añadido en Medicus, le mostrará una casilla de selección al lado del medicamento, le dará(*reconcile*) opción para reconciliar y poder añadirlos al historial del paciente



Referrals (mejoras)

- Se corrige la situación, al imprimir referidos desde la nota de progreso, mostraba página adicional en blanco

Document Template (mejoras)

- En el área de *setting* puede encontrar la opción para configurar documentos, *Document Templates*
- Se añade opción adicional para identificar estatus del documento
- Vas a los tres puntitos del documento, se añade opción *Enter in Error*
- Al seleccionarlo cambia estatus para eliminarlo del listado porque no quiere utilizarlo

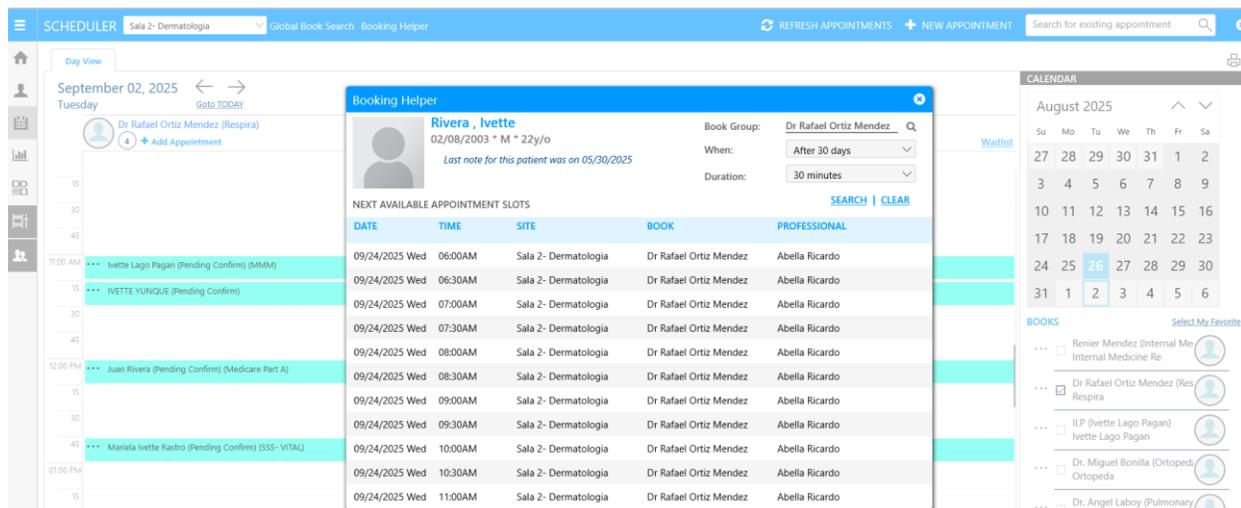
Nota: si quiere cambiarlo de estatus a Active nuevamente, puede ir al filtro View, seleccionar *Enter in Error*, en los tres puntitos, luego selecciona *Edit* y cambia estatus a *Active*



Booking Helper (mejoras)

- Al seleccionar la funcionalidad de *Booking Helper*, se realiza mejoras para traer todos los horarios disponibles en el libro de citas, esto incluye todas las líneas en horarios am y pm.
- Para mejor precisión de horarios puede colocar en el área de *site setting*, cantidad de pacientes citados por días.

Nota: para acceder al *booking helper* puede seleccionarlo desde varias áreas; *daily list* (tres puntitos), *scheduler* (área superior), *patient center*(*action-others*)



Emergency Room – Dashboard- Emergency Room

- Se añade opción para realizar búsqueda según los diferentes estatus del paciente; ejemplo *being attended*
- Puedes realizar búsqueda por nombre, apellido o ambas opciones, luego seleccionas la opción *Search*
- Para regresar a la lista original puedes seleccionar la x del *Search*

The dashboard shows the following patient status counts:

Status	Count
All Active	53
In Waiting	43
Being Attended	10
Waiting Discharge	5
Discharged	0
Abandoned	0
Entered In Error	0

ARRIVED / Lapsed	PATIENT / Insurance	Gender / Age	MRN / Visit ID	CATEGORY / Chief Complaint	ATTENDING / Current Loc/STATUS	ATT.Alert / Pending Orders
8/26/2025 11:24:00 AM 0 Hrs 1 Mins	Ivette Yunque		0000471	1 - EMERGENCY Open Fractures	Registro	Waiting for Registro GET SEND TO
8/26/2025 11:22:00 AM 0 Hrs 3 Mins	Ivette Lago		0000468	1 - EMERGENCY Chest Pain	Registro	Waiting for Registro GET SEND TO
8/26/2025 11:22:00 AM 0 Hrs 3 Mins	Ricky Sosa		0000469	1 - EMERGENCY Chest Pain	Registro	Waiting for Registro GET SEND TO
8/26/2025 11:23:00 AM 0 Hrs 2 Mins	Patricia Laboy		0000470	3 - NON URGENT Rash	Registro	Waiting for Registro GET SEND TO

The dashboard shows the following patient status counts:

Status	Count
All Active	53
In Waiting	43
Being Attended	10
Waiting Discharge	5
Discharged	0
Abandoned	0
Entered In Error	0

ARRIVED / Lapsed	PATIENT / Insurance	Gender / Age	MRN / Visit ID	CATEGORY / Chief Complaint	ATTENDING / Current Loc/STATUS	ATT.Alert / Pending Orders
8/26/2025 11:23:00 AM 0 Hrs 2 Mins	Patricia Laboy		0000470	3 - NON URGENT Rash	Registro	Waiting for Registro GET SEND TO

The dashboard shows the following patient status counts:

Status	Count
All Active	52
In Waiting	42
Being Attended	10
Waiting Discharge	6
Discharged	0
Abandoned	0
Entered In Error	0

ARRIVED / Lapsed	PATIENT / Insurance	Gender / Age	MRN / Visit ID	CATEGORY / Chief Complaint	ATTENDING / Current Loc/STATUS	ATT.Alert / Pending Orders
5/22/2025 8:12:00 AM 2307 Hrs 17 Mins	FERNANDO SURILLO MARTINE MMM	M 55 y/o	A00109971 0000447		Triage	Waiting for Discharge GET SEND TO
4/23/2025 9:22:00 AM 3002 Hrs 7 Mins	test test test		0000434	te	Registro	Waiting for Discharge GET SEND TO
6/5/2025 4:33:00 PM 1952 Hrs 56 Mins	Ivette Lago Pagan MMM	F 45 y/o	00000221 0000453	1 - EMERGENCY Cardiac - respiratory arrest	Alfamiento	Waiting for Discharge GET SEND TO
4/4/2025 5:00:00 PM 3450 Hrs 29 Mins	MARIA Del Pueblo	F 5 y/o	0000432	1 - EMERGENCY Chest Pain	Amanda Bernier Merle Triage	Waiting for Discharge GET SEND TO
3/31/2025 1:01:00 PM 3550 Hrs 28 Mins	FERNANDO SURILLO MARTINE MMM	M 55 y/o	A00109971 0000429	1 - EMERGENCY Chest Pain	Angel Laboy Treatment 01	Waiting for Discharge GET SEND TO
8/26/2025 11:23:00 AM 0 Hrs 0 Mins	Patricia Laboy Perez Medical Card Systems	F 45 y/o	Test. 0000470	3 - NON URGENT Rash	Re-Evaluation	Waiting for Discharge GET SEND TO

Emergency Room – Interacciones drug to drug / drug to allergies

- Se realiza documentación de alergias y/o medicamentos en el historial del paciente de la visita
- Al documenta plan de tratamiento, Profesional selecciona medicamento que activa interacción según la documentación del historial de la visita

- Le mostrara pantalla con los datos de la interacción.
- Esta pantalla podrá; escoger opción en el *drop down* de la lista de *override* y continuar con la prescripción o cerrar la pantalla en la x y escoger otro medicamento
- Al escoger opción para continuar con el plan de tratamiento, puede completar con la documentación
- En la *preview* tiene el triángulo de referencia con los datos de la interacción
- *Dashboard Dispatcher*: el usuario que realice el plan de tratamiento ordenado por el médico tendrá visibilidad de la interacción, puede escoger el triángulo para ver el detalle

The screenshot shows a user interface for 'ER Order Creation'. At the top, there are buttons for 'SIGN & SUBMIT' and 'CANCEL'. The user is identified as 'Ivette Lago' with a profile picture and a dropdown menu labeled 'Order creation helper'. A red warning dialog box is overlaid on the screen. The dialog box title is 'Prescription Interaction Warning'. It contains a warning icon and the text: 'Interaction Warning for: aspirin 325 MG / citric acid 1000 MG / sodium...'. Below this, it says 'Allergy Interaction' and 'The patient is allergic to aspirin.' At the bottom of the dialog, there is a text input field with the prompt 'Please enter a reason to override the warning:' and a dropdown menu with 'Patient being monitored' selected. An 'ACCEPT' button is located at the bottom right of the dialog box.

PATIENT ROSTER

ER Order Creation SIGN & SUBMIT | CANCEL

Ivette Lago | ***** Order creation helper ▾

MEDICATIONS

- ... ⚠ aspirin 325 MG / citric acid 1000 MG / sodium bicarbonate 1700 MG Effervescent Oral Tablet
 - Priority: Routine / Frequency: ONCE / Starting: Immediately
 - Instructions:
 - Comments:
 - Primary Diagnosis: R51.9 Headache, unspecified

ORDER CREATOR HELPER

Order Combos Clinical Lab Tests Imaging Medication Patient Care

My Favorites ▶ General Search ▾

aspirin Search

Medication	Generic	RxNorm	Favorite
+ aspirin 325 MG / citric acid 1000 MG / sodium bicarbona...	✓	1536467	Add
+ aspirin 500 MG / dextromethorphan HBr 10 MG / doxyla...	✓	1536503	Remove
+ aspirin 325 MG / citric acid 1000 MG / sodium bicarbona...	✓	1536675	Add
+ aspirin 500 MG / citric acid 1000 MG / sodium bicarbona...	✓	1536833	Add
+ aspirin 325 MG / chlorpheniramine maleate 2 MG / phen...	✓	1536840	Add
+ aspirin 325 MG / chlorpheniramine maleate 2 MG / dextr...	✓	1537029	Add
+ aspirin 162.5 MG 24HR Extended Release Oral Capsule	✓	1665356	Add
+ aspirin 81 MG / calcium carbonate 777 MG Oral Tablet	✓	1722689	Add
+ aspirin 81 MG / omeprazole 40 MG Delayed Release Ora...	✓	1811631	Add
+ aspirin 325 MG / omeprazole 40 MG Delayed Release Or...	✓	1811632	Add
+ aspirin 300 MG Rectal Suppository	✓	198464	Add
+ aspirin 325 MG Oral Capsule	✓	198466	Remove
+ aspirin 325 MG Delayed Release Oral Tablet	✓	198467	Add

ER Order Creation SIGN & SUBMIT | CANCEL

Ivette Lago | ***** Order creation helper ▾

MEDICATIONS

- ... ⚠ aspirin 325 MG / citric acid 1000 MG / sodium bicarbonate 1700 MG Effervescent Oral Tablet
 - Priority: Routine / Frequency: ONCE / Starting: Immediately
 - Instructions:
 - Comments:

Medication Alert ✕

Allergy Interaction

○ **The patient is allergic to aspirin.**

