

TotalABA Release Notes

This document lists the updates to the TotalABA application that contain changes that may affect your practice. All of our documentation and training videos can be accessed via the Support link in the sidebar while logged into TotalABA. If you require further assistance, please contact us at support@inviscidsoftware.com.

3.0 – March 27 - 31, 2017

New Features

- A new calendar control has been released with a ton of new functionality! Below is a highlight of what is new.
 - Views by student (day/week)
 - Views by location (day/week)
 - List view
 - Time zone support
 - Ability to group by resource on the standard day/week
 - The left pane of the calendar can now be collapsed to increase the amount of space available
 - The date headers for any week/month view are now a link that will take you directly to the day view
 - Improved printing
 - Improved support for tablets and mobile devices
 - The headers are now fixed when scrolling allowing you to drag/drop appointments outside of the viewable area.
 - The student calendar now synchronizes the dates between the two calendars when the calendar is changed on the top (student) calendar. The student calendar can take up the entire screen by clicking the **full screen** button at the top of the calendar. When in full screen mode, click the **half screen** button to return to the split screen calendar.
- Additional information now may be displayed on the appointment popup when clicked from the calendar. Click on the “settings” button in the calendar and select the additional fields from the Hover Optional Fields checkboxes. Please note that these fields are not displayed if a value does not exist.
- The calendar and appointments now support a time zone selection. Previously the calendar was always displayed based on the time zone of the computer/device used to access TotalABA. If you wish to enable this functionality, click on the “settings” button in the calendar and select “Display Time Zone Selector”. Then select the time zone you would like for the calendar. By default, the calendar will display in the same time zone that your user profile is set to (<http://support.inviscidsoftware.com/customer/portal/articles/1748915-how-do-i-change-my-information-in-totalaba>).

- The day and week views may now be grouped by resource (assigned to). To enable this feature, click on the “settings” button in the calendar and select “Day/Week View Group By Resources”. This will create a separate column under the date for each resource.
- If an error occurs when saving a record, the application will automatically scroll to the top of the page so the message is immediately visible.
- The assigned therapist(s) for a student now display at the top of the resources on the student calendar. The remaining staff members are displayed afterwards.

Bug Fixes

- Appointments with a 15-minute duration sometimes did not display correctly on the calendar when using a 30-minute slot increment. This has been fixed.
- Improved display on tablets and mobile devices. In certain cases, the views were cut-off (e.g. the Resource Day view).

2.77 – January 23, 2017

New Features

- A new bulk sign-off has been added to the Sign-Off Sessions page. This allows you to select the sessions for sign-off and then click a single button (Bulk Sign-Off) to have them all signed-off at once. Only sessions that have passed the basic validation are available for this new feature.
- You can now clone the clinical information on a new session from a prior session for that student. This will help improve documentation accuracy and the amount of time it takes to add it. Click the “Clone Clinical Data” button on the new session, select the session to clone, choose the fields you would like to clone and finally click the “Clone” button.
- Sessions can now be combined into a single superbill during sign-off for non-insurance funding sources. A new field has been added to the funding source called Batch Sessions on Sign-Off. If checked, sessions for that funding source follow the same rules as insurance type sessions during sign-off. All insurance funding sources have this checked by default.
- Sessions are now combined during sign-off if the authorization # is the same across the sessions (e.g. multiple authorizations with the same authorization #). Previously the sessions were combined only if they shared the same authorization record.
- The scheduled/used minutes for authorizations in TotalABA are calculated from the appointment. This is based on the applied minutes field on the appointment. Previously it was the responsibility of the practice to update the applied minutes on the appointment if the billable minutes of the corresponding session were not the same as the appointment duration. A new practice setting has been added that automatically updates the applied minutes on the appointment to the billable minutes of the session(s) any time a session is saved. This setting is found on the Practice Admin tab of the settings and is named Set Applied Minutes to Billable Minutes (it is unchecked by default for existing practices).
- The first phase of stage levels has been added to lesson plans and treatment goals. This will allow you track the various levels a student has achieved and what the criteria are for moving up

or down a level. This is completely customizable and allows your practice to define what the mastery level(s) are. The next phase in a future release will automate the process of moving up and/or down a level based on lesson observations.

- Additional fields may now be included on the Print Clinical Session page. These are optional fields that are set on the Practice Admin tab. The new fields are: Therapist, Billing Provider, Location, Diagnosis Codes and Procedure Codes.
- New user settings have been added to sign-off on assessments and set the status of a treatment plan to active. Previously this was all part of the sign-off sessions setting on the user record. By default, all existing users that had Sign-Off Sessions checked have Sign-Off Assessments and Activate Treatment Plans checked.
- Appointments may now be canceled/deleted for a specified date range when choosing all appointments in a recurrence pattern, for a student or for the assigned to.
- When printing multiple sessions for a single student at once, the information may now be consolidated to only include the header and logo on the first page. Each session is then separated by a solid, horizontal line instead of a new page. This helps save on paper usage. A new practice admin setting has been added named Print Consolidated PDF. This option is also available when selecting the sessions and only applies when printing sessions for a single student.
- On the Sign-Off Sessions page (multiple sessions) new columns have been added to show the Appointment Type and Non-Billable Minutes from the session.
- The GPS coordinates have been added to the session approval page where the parent/therapist signature is captured. The accuracy is dependent upon the computer/device/WIFI settings.

Bug Fixes

- A student contract may now be deleted if it is not linked to an authorization, session or superbill.
- The target observations from the lesson plan were not correctly added to the treatment goals when treatment goals were added in bulk (Add Multiple Treatment Goals button). This has been fixed.
- Staff Members are now sorted consistently throughout the application by last name / first name. This includes the calendar resource views and various pickers (e.g. Assigned To, Therapist).
- A value of 0 may now be used for the applied minutes on the appointment (this means the appointment will not count against an authorization).

2.73 – September 10, 2016

New Features

- Multiple sessions may now be printed at once. A new Print Clinical Information button has been added to the sessions list and the sessions related record section on the student record. This will load the print multiple sessions window.
 - Enter any additional filters to determine which sessions should be listed (e.g. by student, status, therapist, date of service, etc.).
 - Once the filters have been added, click the Load Sessions button to display the sessions that meet the filter criteria.
 - The filter can be saved as the default for future printing by clicking the Save As Default button.
 - Select the sessions from the displayed list or click the Select All button to choose them all (a maximum of 205 records may be selected).
 - Click the Print button to print the selected sessions.
 - This will print a separate page for each session with the same formatting as when the Print Clinical Information is accessed on an individual session.
 - Alternatively, you can select the records to print from the session list (use the checkbox to left of each session), then click the Print Clinical Information button. This will generate the print page for the selected session and will bypass the print multiple sessions selection window.
- An improved session sign-off workflow has been added to TotalABA. Similar to the print multiple sessions described above, a new Sign-Off button has been added to the sessions list and the sessions related record section on the student record. This will load the sign-off sessions window which will list out the sessions and allow for any additional filters.
 - Basic validation against each session is performed and any detected issues that would prevent a sign-off are displayed for each session (not all validation is performed at this point).
 - An Edit button is displayed next to each session allowing you to correct any problems. Saving the session will return back to the multiple sign-off window.
 - Sessions that may potentially be signed-off will have a Sign-Off button displayed next to them. Click this button to sign-off on the session and return back to the sign-off window. Sessions that are signed-off in this manner will be removed from the list.
- A new button has been added to the treatment plan that will recalculate the treatment goal results. Simply open a treatment plan in view mode and click the Recalculate button. This may be needed if a lesson is modified after the observations are collected (e.g. use as baseline is checked, start date/time is changed).
- The appointment end time is now included in the month view of the student calendar. This includes the print page.
- A session may now be directly deleted if lessons already exist for that session. A new session delete validation page is displayed that shows what other records are linked to the session. Any time tracking and lesson records will also be deleted. Previously a user would have to delete the lesson observations and then lesson records before they were able to delete a session. Note,

this only applies to sessions that are not signed-off and the user must have delete access permission.

- Users with a license type of non-therapist may now be made an assigned therapist on a student. This allows practices that utilize record level security to control student access for any non-therapists in their site.

Bug Fixes

- The additional details on a lesson plan were not displayed correctly when performing the lesson. Specifically, any line breaks were ignored. The formatting is now correct.
- Use as Baseline is now automatically selected on the first lesson created for a treatment plan. Previously this only occurred if the Quick Lesson option was used on a session. Now it also happens if a new lesson is created from the lessons related list on the session or via the left pane when collecting data.
- The option to limit the appointment assignment to an assigned therapist from the student record was not working correctly when appointments were dragged & dropped via the resource views in the calendar. It is now enforced if the practice has this setting enabled. This optional setting is located in the Practice Admin tab of the settings (collapsible left pane).

2.70 – June 12, 2016

New Features

- Code groups have been extended to the student. Previously they were only available on the staff member. Code groups control which procedure and/or diagnosis codes may be selected on a session based on the student, therapist (staff member) and date of service. This will now allow your practice to limit which procedure codes may be used for each student. The help documentation contains further details.
- A new setting has been added that gives the practice the ability to only allow sessions with a specific status to be signed-off (e.g. only allow sign-off if the status is Ready for Review). This setting is found in Practice Admin tab of the settings.
- This update includes new functionality that will allow authorized persons in your practice to manage your own users. This includes creating users, modifying security, deactivating users, send reset password links and updating the name/email. Additional information will be provided in the upcoming weeks.

Bug Fixes

- The date in the header of the print clinical document was off by one day if the session date of service was after 5:00 PM PST. This has been fixed.
- Appointments with a start time before the user's calendar start time setting were not included on the Resource Day View print page, this has been fixed.

2.67 – April 17, 2016

New Features

- Additional practice settings may now be controlled by the practice in the Practice Admin tab of the settings. These previously had to be set by Inviscid
 - Limit Appointment Locations to Student Location(s)
 - Require Clinical Fields for Sign-Off
 - No Sign-Off if Canceled
 - No Sessions in the Future
 - Time Tracking Synch Method
 - Time Tracking Category
- The student representative and therapist signatures may now be included on the Print Clinical Session page. These are optional fields that are set on the Practice Admin tab.

Bug Fixes

- Certain characters (e.g. < > ' ") caused problems when pasted from an external document into any of the fields on an assessment or treatment plan. This has been fixed.

2.66 – March 20, 2016

New Features

- Code groups have been added to TotalABA. This allows specific diagnosis and/or procedure codes to be assigned to a staff member, which in turn limits the codes that may be selected on a session where the staff member is the therapist. By default, only administrators in the practice have access to create & modify the code groups. Code groups are accessed via the new Codes Setup tab and a new section has been added to staff members as well. Please see the help documentation for further details - <http://www.inviscidsoftware.com/trainingVids/Manuals/InviscidTotalABAHelp.pdf>.
- The session print page may now contain some optional information if desired by your practice. Go to Settings / Practice Admin / Session Settings to enable these fields: Appointment Type, Billing Provider Credentials, and Therapist Credentials.
- Assessments may now be printed directly from TotalABA as a formatted PDF, just like sessions and treatment plans. This includes your company's logo if it has been uploaded to TotalABA (see Settings / Practice Admin / Logo Settings).
- Several new practice settings have been added. Go to Settings / Practice Admin to enable or disable these features if desired.
 - The ability to limit a single session per appointment has been added. Some practices will never have multiple sessions on an appointment and this gives them a way to prevent duplicates (Session Settings section). By default this is not enabled.
 - The assigned to on a student (therapy) appointment may be limited to the assigned therapists from the student record. This only applies if the setting is checked and the

student has at least one assigned therapist (Appointment Settings section). By default this is not enabled.

- If the appointment type on an appointment is blank and an authorization is selected that has an appointment type, it will be automatically set on the appointment.

Bug Fixes

- Some users were experiencing errors when attempting to validate their mobile phone number. This is fixed.
- Selecting the background color on a new appointment type sometimes did not work if the scope was not student (therapy). This has been resolved.

2.62 – January 23, 2016

New Features

- An existing session may now be viewed or modified directly on the appointment pop-up window from the calendar. These options are only available if the appointment has a single session. If multiple sessions exist for the appointment, then the user will be notified.
- Multiple treatment goals may be added at once to a treatment plan instead of adding them individually. Click on the “Add Multiple Treatment Goals” button and then add the applicable lesson plans (the options may also be filtered).
- A new Lesson Results page is now available from the lesson view page and while recording lesson observations. This will allow you quickly view the current results for the lesson in a separate window.
- Additional user settings are now available that control the left pane when performing lesson observations. These include the ability to set the width of the left pane, hide lessons with zero observations and the type of icon displayed at the end of the lesson (clicking the icon launches the lesson results page). Furthermore, the legend for the left pane may be viewed directly from the page.
- A new Goal Details field has been added to the treatment goals. This enables the user to specify how the lesson plan should be specifically implemented for the treatment plan and may be viewed from the lesson. This is useful when the lesson plan is generic (e.g. pronunciation) and you want to specify what should actually be accomplished (e.g. pronounce a specific word or a specific letter at the beginning of a word). The goal details are also displayed after the objective in the left pane when performing the lesson.
- The width and height of the practice logo that displays on the various print pages may now be scaled to ensure that the display is ideal. Go to Settings in the in the left pane of TotalABA and then go to the Practice Admin tab to access the logo settings.

Bug Fixes

- The Confine to Authorization option when creating recurring appointments that are outside of the authorization dates is now displayed correctly after the user is warned.
- Authorizations are now automatically changed to expired the day after the expiration date. Previously they were changed to expired on the expiration date.
- A bug has been fixed that occurred when creating a recurring appointment that ended on the same date as the authorization expiration date.
- The print pages for the session and treatment plan have the lines breaks as entered by the user. Previously these were ignored.

2.56 – November 18, 2015

New Features

- Your practice may now elect to limit the appointment location to the student location(s). If you wish to enable this feature, please contact us. If enabled and the student has at least one student location, then any new appointments for the student may only have a location that matches one of the student's locations.
- The ability to add electronic signatures to a session from a student representative and/or a staff member in your practice has been added to TotalABA. These are called session approvals. This is different than signing-off on a session as it allows your practice to record and track approvals for the session by various people inside and outside of your practice before the session has been signed off. By default, only the practice administrators have access to session approvals. If you would like other users to have access, please contact us.
- The left pane when performing lesson observations has undergone significant enhancements. This includes the following. Please see the left pane overview for more details - <http://www.inviscidsoftware.com/trainingvids/manuals/lessonobservationleftpane.pdf>
 - All treatment goals and lessons from all sessions for the current date of service are displayed along with the number of recorded and target observations.
 - Ability to quickly create a new lesson or record additional observations for all treatment goals and lessons for the session.
 - Hovering over an existing lesson will display the additional details from the lesson plan.
 - Ability to identify which lessons have met the target number of observations.
- The sessions on sign-off page are now displayed in chronological order. This will help identify any potential gaps or overlaps in sessions for the day.
- If your practice is utilizing record level security (user access to students and the related records is limited to specific students) then this may also be controlled via the staff member locations. Previously this could only be set by making the user an assigned therapist on the student record. Now, if you set staff member locations for a specific user and they match the student's locations, then the user will have access to the student and the related records (e.g. appointments, sessions, etc.). If your practice is already utilizing record level security and would like this new feature enabled, please contact us. If you are interested in implementing record

level security, this document explains how it works and the steps required to add it to your practice -

<http://www.inviscidsoftware.com/trainingVids/Manuals/TotalABAStudentLevelSecurityDetailsAndSetupGuide.pdf>.

- A location may now be selected on appointments with a scope of Non-Student. However, the location is not required.

Bug Fixes

- A procedure is no longer required to sign-off on a session that has been marked as non-billable.
- An inactive billing provider will no longer be set on a new session if that billing provider was listed on the corresponding student, authorization or appointment type.
- Selecting the insured associated person on a contract with an insurance funding source now works correctly.

2.54 – September 26, 2015

New Features

- This release includes the import of all common ICD-10 codes into your site. Furthermore, validation has been added to sessions during the sign-off process that only allows ICD-9 codes for a date of service before October 1, 2015 and only allows ICD-10 codes for a date of service on/after October 1, 2015. If your practice needs this restriction removed, please contact us.
- If requested, we can deactivate diagnosis codes with a type of ICD-9 so they can no longer be selected on a session, authorization or student diagnosis. Please contact us if you would like this done.

Bug Fixes

- Saving a lesson observation for a lesson plan with a very long name caused an error. This has been fixed.

2.53 – August 29 - September 5, 2015

New Features

- Significant enhancements and new features have been added to the clinical documentation and data collection portion of TotalABA. If your practice is not already using the clinical portion of TotalABA, please contact us for access or further details. The new features include but are not limited to the following. Please see the help documentation for further details. A webinar recording was made that contains training on the data collection functionality and may be found here - <https://www.youtube.com/watch?v=u2K52cBMdc>.

- Lesson Plans – Practices now have the ability to customize the display, prompt levels and responses that are part of the plan. This includes several new response types such as numeric, picklist, percentage and text values.
- Lesson Plan Templates – Templates may be created that allow new lesson plans to quickly be created with all the same values/settings as the template. This will vastly improve the creation process of the lesson plans when utilized. A default template will be automatically created in your site to mimic the prior version of lesson plans (same prompts, response and settings).
- Ability to switch to another lesson plan/treatment goal with a single click while recording observations.
- Treatment plans and goals have been enriched to handle multiple lesson responses and response types.
- Improved reporting and view pages for lessons and treatment goals.
- The treatment plan is now automatically selected on a new session if the student only has one active treatment plan.
- Appointment types now support a default billing provider. If the billing provider is set on the appointment type, then it will be used for a new session, assuming the student does not already have a default billing provider and there is not an authorization for the appointment with a billing provider.
- A new setting is available that does not allow sessions to be created for appointments that are canceled. Furthermore, if a session exists for a canceled appointment it may not be signed-off. By default this has been applied to your practice. Please contact us if you would like to disable this functionality.
- A new setting is available that does not allow sessions to be created for appointments that occur on a future date. This helps eliminate mistakes of sessions being created for the wrong appointment. By default this has been applied to your practice. Please contact us if you would like to disable this functionality,
- A new schedule setting has been added called Show Comments on Home Page Calendar. If this is checked, then any comments entered on an appointment will be displayed in the calendar on the Home tab.
- Students may now be associated to one or more locations in your practice via the Student Locations related record section on the student record. This may be helpful for reporting purposes. In a future release, your practice may choose to implement record level security based on a combination of the student and staff member locations (currently record level security is only supported via the assigned therapist). The student location will also be part of other future enhancements. By default only administrators in your site will have the ability to create, modify and delete student locations. All other users will have read-only access. Please contact us if other users should also have this access.
- Added the ability to cancel/delete all appointments for a single day. The user must have the Mass Delete Appointments permission in order to access this feature.

- The Time Out has been added to the session sign-off page (previously only displayed the Time In).

Bug Fixes

- Procedure codes on the session now calculate the correct units, duration and unreimbursed minutes when a procedure code is typed into the field and the save button is immediately clicked afterwards. Previously, the user had to edit and resave the session to get these values to populate when this scenario occurred.
- The procedure units in superbills were not displaying partial values correctly even though the actual data was correct (e.g. was displaying 1 instead of 1.25). This did not affect the values being sent to MRC billing, they were correct. The display of the units has been fixed.
- Searching for a single quote (e.g. O'Brian) in the student picker caused an error, this has been fixed.
- The student's date of birth was not displayed correctly (off by one day) when creating and editing a session. This has been fixed.
- Non-therapists no longer show up when selecting a therapist on a session.
- An error occurred when creating a new appointment from the calendar on the Home tab. This has been fixed.
- An error occurred when attempting to create an appointment in the calendar when clicking between 12:00 AM and 1:00 AM. This has been fixed.

2.46 – May 17, 2015

New Features

- A new feature has been added to the sessions called Non-Billable. This field appears before the Funding Type and is unchecked by default. This allows the practice to record documentation for the student even though the time spent is not billable (e.g. the student was sleeping for the entire session). Furthermore, the session may be signed-off indication the session notes have been accurately entered. If your practice has custom permissions for sessions, then they have been updated accordingly. If checked, the following will occur:
 - The Non-Billable Minutes are set to the session duration and the Billable Minutes are set to zero.
 - Send Billing Message is unchecked and disabled. This means the session will never be sent to the billing company.
 - A procedure code and units are not required to sign-off on the session.
 - The Funding Type and Contract are not required to sign-off on the session.
 - The Billing Provider is not required to sign-off on the session.
 - A Diagnosis Code is not required to sign-off on the session.
 - Non-Billable sessions will not be linked to other sessions during sign-off

- The Billing Provider and Diagnosis Codes have been added to the authorization as the insurance may specify these values. If entered, then they will be automatically set on any corresponding new sessions. If blank, then the values from the student record are still used.
- An appointment may be canceled directly from the calendar. Click on the appointment and use the new Cancel button (between Edit and New Session). Furthermore, if requested, you can allow users to cancel appointments without giving them access to create, modify or delete appointments. Please contact us if you would like to implement this in your practice.
- The number of units has been added next to each procedure code on the session sign-off screen. The number of units appears in brackets next to the procedure code. For example: 0360T[1.00], 0361T[2.00].
- Added the Comments field to the authorization picker for a student. This will help practices determine the correct authorization on an appointment when they are using the comments to record additional details.
- The performance off the Appointment Delete/Cancel window has been optimized. Practices with a large quantity of appointments should see a significant improvement.

Bug Fixes

- A session can no longer be saved with a blank procedure code.

2.35 – March 14-30, 2015

New Features

- A recording of the webinar that was held to introduce this release may be viewed here - <http://inviscidsoftware.com/trainingVids/Webinars/March2015/March2015Webinar.html>.
- Multiple procedure codes may now be added to a session (up to 5). Each procedure code may have a modifier code and duration. The units for each procedure code are automatically calculated based on the duration applied to each procedure (assuming the procedure has a minutes per unit value). Please see the help documentation for further details (<http://www.inviscidsoftware.com/trainingVids/Manuals/InviscidTotalABAwithMRCHelp.pdf>).
- The use of T-Codes (technician-administered services) is now fully supported in TotalABA. This allows the initial code to be bundled with a secondary code (for example, 0360T and 0361T). Furthermore, when the initial code is selected on a session, the secondary code is automatically added and the units are correctly calculated for both codes.
- Several new fields have been added to the procedure code record to support T-codes and other functionality. These fields include:
 - Maximum Duration – Indicates the maximum # of minutes that may be applied to the procedure on a session. Any additional minutes will be applied to other procedures. Only applies when minutes per unit on the procedure code has a value.

- Maximum Units per Day - Indicates the maximum # of units that may be signed-off on all sessions for a given day for the student. If the maximum is exceeded then you will not be able to sign-off on the session(s).
- Rounding Method - Indicates the rounding method used to calculate the # of units on a session, assuming minutes per unit is not 0. See the help documentation for details on each option.
- Secondary Code - If selected, then the secondary code will be automatically added to the session when this procedure code is selected. This is typically used with T-Codes (e.g. 0365T would be the secondary code for 0364T).
- A new section called Staff Members has been added to TotalABA. This allows your practice to track your employees/contractors along with their credentials, current & prior engagements and filtering criteria for schedule views on the calendar. A staff member record is automatically created for each existing TotalABA user. Furthermore, the billing provider information has been automatically moved from associated people to staff members. By default only users in the Administrator security group are able to view, create and modify the staff member information. All other users only have access to the staff member name and if the staff member is a billing provider. Please contact us if you would like any changes to this security model.
- Time tracking records may now be automatically created whenever a new session is saved. This helps save a couple steps if your therapist previously had to manually create a time tracking record for each appointment/session. Please contact us if you would like this setup in your practice, by default it is not enabled.
- A new feature has been added that restricts who can use the schedule views in the calendar. By default users in the Therapist or Basic User security group will be limited to their schedule in the calendar. All other security groups will still be able to access the schedule views for all other users. If you would like this changed in your site, please contact us and will make the necessary modifications. *Note that this only affects the calendar, it does not prevent users from viewing appointments via a student or the appointments list (record level security is required for this).*
- The selection of lesson plans may now be filtered by the lesson category. This is used when selecting an objective on the treatment plan or a session and will make it easier to find a lesson.
- Notes and attachments are now available in the expense and time tracking records.
- Billing provider information has been moved from associated people to staff members.

Bug Fixes

- Non-student appointments did not display in the calendar if the schedule view had a location filter applied (only a subset of locations was selected). This is now fixed.

2.17 – November 9, 2014

New Features

- Previously you could select which staff members to display in the other schedules and resource views of the calendar in TotalABA. This release contains a powerful improvement to this functionality called Schedule Views. The “other schedules” button on the calendar has been renamed to “schedule views”. On the left of the calendar is a drop down list of your personal views for the calendar. This allows you to filter what appointments display on the calendar based on the staff member (attendee), appointment scope, appointment type, and location. Furthermore, you can now have multiple schedule views saved instead of having to change your options each time you need to see different criteria on the calendar. Click the “Manage Views” button next to the drop down list to manage existing views and create new ones. Everyone will have a view called “All” that contains all appointments (no filters). If you had made prior selections in the prior “other schedules”, this has been migrated to the “Old Selection” view. Feel free to rename this to something more meaningful. Please see the help documentation for further details if needed.
- The recent items in the collapsible left pane of TotalABA have been vastly enhanced. It now categorizes the last ten records you have accessed for each type: students, appointments, sessions, authorizations and other.
- The ability to set default values for the activity, progress and impressions on a new session is now available. This is a user setting, meaning that each person in your practice would need to set this up for themselves if desired. However, if you do have practice defaults you would like to use, please contact us to have it added to all of your users. The default values are set by going to Settings in the collapsible left pane and choosing Sessions.
- A New Session button has been added to the appointment pop-up window from the calendar. Clicking on this button will open a new session for that appointment. A warning will be displayed if a session already exists for the appointment on the new session form.
- If there are comments entered on an appointment, they are now included in the appointment pop-up view from the calendar.

Bug Fixes

- Appointments can no longer have a duration of zero minutes. This was causing display problems on the calendar.
- Assigned therapists for a student were not displaying correctly when selecting the assigned to for that student’s appointment.
- There was a new bug with the calendar on the Home tab that was related to daylight savings time and the dates immediately following the transition.

2.15 – October 5, 2014

New Features

- We are excited to now have record level security in TotalABA. This means that you may now setup students, appointments and related records to only allow access to defined users in your

practice. Please see the TotalABA Student Level Security Details & Setup for further information (<http://www.inviscidsoftware.com/trainingvids/manuals/TotalABAStudentLevelSecurityDetailsAndSetupGuide.pdf>). *Also, please note that you must first complete setup guide in the aforementioned link and submit it to Inviscid Software before the described security will work in your practice.* If you do not want to utilize this new functionality there is no need to do anything.

- Billable and Non-Billable minutes have been added to the session. By default the Non-Billable minutes are 0. The Billable Minutes will be equal to the duration between the Time In and Time Out minus any Non-Billable Minutes that are entered. You can now track how much time was spent in the session while also differentiating between the time that should be billed versus time that was spent for other reasons. The Units are always calculated based on the Billable Minutes.
- An Edit button has been added to the appointment pop-up window from the calendar. Clicking on this button will open the appointment directly into edit mode. Saving the appointment will return you back to the calendar, exactly where you left it.
- On non-student appointments in the calendar the Reason is displayed if available, otherwise the appointment type is displayed. Previously, neither was available on the calendar itself.
- The End Time has been added to the appointment pop-up view from the calendar. Previously it just displayed the Start Time and the Duration.
- The appointment End Time is now displayed in the calendar views where time slots are not present. Specifically, it now present in the Month, Resource Week and Resource Month views.
- The lesson plan details and any attachments/notes are now displayed when performing a lesson. If needed, this can be hidden by going to the Settings link in the collapsible left pane. Go to the Lessons tab and uncheck Show Lesson Plan Details.

Bug Fixes

- The color palette picker sometimes did not work when creating new appointments types. This has been fixed.
- The assigned therapist on the student calendar were not displaying correctly (they display in a red font with an asterisk).
- On a new student, clicking the Default Contract displayed contracts for other students. This field has been disabled for new students as they will not have a contract entered yet.
- Typing directly into the Contract field (instead of using the picker) on students, authorizations and sessions would display contracts for other students and allow you to save the record. This has been fixed to prevent this. It is recommended that you always use the picker in these situations.

2.3 – August 6, 2014

New Features

- Funding sources have replaced insurance plans. A funding source is essentially the entity that will be paying for a student's therapy and may be any one of the following: Insurance, Educational Institution, Regional Center, Private Pay or Other. All existing insurance plans have been converted to a funding source with a type of Insurance. This allows TotalABA to support the various payers your practice does business with.
- Contracts have replaced insurance coverages. A contract is linked to a funding source and is used to track the details for payment to your practice. All existing insurance coverages have been converted to a contract with an insurance funding source. If a student was flagged as private pay, then they now have a private pay contract.
- Two new fields have been added to the session: Funding Type and Contract. The private pay checkbox on a session has been replaced by these fields. All sessions that were previously flagged as private pay now have a private pay funding type and contract. On a new session, the contract is determined by check the following:
 - Does the appointment have an authorization? If yes, use the contract from the authorization.
 - Does the student have a default contract? If yes, use the student's default contract.
 - Does the student only have one active contract? If yes, use that contract. If the funding type is Insurance and your practice using MRC Billing, then the contract will not be selected and the funding type will default to insurance.
- Two new fields have been added to the student record: Default Funding Type and Default Contract. This helps determine what funding type, funding source and contract is used on a new session. The Private Pay checkbox on the student has been replaced by the private pay contract. Students that previously had private pay selected now have a default contract of private pay.
- Authorized users in your practice (administrators by default) may now maintain procedure codes that have a type other than CPT. This is useful for recording sessions for non-insurance funding types that utilize their own coding system.

Bug Fixes

- When using an iPad (and other related devices), clicking on a session on the session sign-off page did not open the session. This has been fixed.
- The Return To List After Sign-Off setting now works correctly on an iPad and other related devices.
- Deleted appointments were always sending a notification email to the assigned to user. This has been fixed so that it only sends a notification if the user has Email Notification on Changed Appointment checked and the person deleting the appointment is not the same as the assigned to.

1.97 – April 6, 2014

New Features

- Multiple attendees can now be added to the same appointment. There is still the Assigned To on the appointment which is required. Additional attendees are optional. Please see the help documentation for further details.
- Sessions that share the same Procedure, Diagnosis, Date of Service and other criteria for the student are now linked together. This means that they must all be signed-off at the same time. If TotalABA is communicating with a billing system for your practice, this will result in a single billing message with the units combined for the procedure across all the linked sessions. This was done to help eliminate errors in billing and potential rejected claims from the insurance companies. Please see the help documentation for further details.
- Added an End Time field when creating/modifying appointments. Either this field or the Duration may be used to set the length of the appointment.
- Added Start Time and End Time fields to the time tracking records. These will be blank on existing time tracking records created before this release. They are optional and only the Duration is required. However, setting these values will automatically update the duration (and vice versa).
- Added a printable version of the clinical information on a session (Activity, Progress and Impressions). This is accessed via the Print Clinical Document button on the session. It will create a PDF version which includes the practice logo and an electronic signature on completed sessions. Both images are uploaded via the Settings link in the left pane. The company logo is in the Company tab and the sign-off user must upload their signature image in the General tab.
- A new field has been added to appointment types called Require Authorization. If checked, then appointments with this type must have an authorization selected in order to save the appointment.
- If the linked appointment to a session has an authorization, and that authorization has a procedure code, then a warning now appears on the session sign-off letting the user know that the procedure on the session is different than the authorized procedure.
- Added a Units per Visit field to procedure codes. If this value is set, then Minutes per Unit must be zero and vice versa. If Units per Visit contains a value greater than one, then this value will be automatically used as the Units value on a session when that procedure code is selected. Previously, the Units would be blank for these codes and would require a user to manually set the value. Please contact MRC to setup these values for the appropriate procedure codes if necessary.
- The ability to return directly to the session list after signing-off has been added. This is accessed via the Settings link in the collapsible left pane. Go to the Sessions tab and select Return To List After Sign-Off.
- Added the ability to print the Student Calendar.
- Added a Secondary Email field to the student record.
- A practice can now make the clinical fields (Activity, Progress and Impressions) not required for signing-off on a session. This should be done if the practice is tracking this information separately from those fields. Please contact support@inviscidsoftware.com if you would like this change to be made.

- The ability to delete all appointments for a student or an assigned to has been restricted. If any users require this ability, please contact us and we can change that setting.

Bug Fixes

- Print Assigned To Appointments from an existing appointment only included appointments with a scope of Student (Therapy). This has been fixed to include all appointments for the given assigned to.
- Applied Minutes was being set in the appointment history for new records. It will now only appear if it is changed during a modification.
- New appointments from the calendar (resource week/month views) no longer default to an All Day Event. Instead the Start Time and Duration are left blank.

1.85 – December 15, 2013

New Features

- Above the calendar there are new options for navigating and viewing the calendar. Select **my schedule** to view only appointments that are assigned to you (this will not affect the available schedules that you have selected). Select **other schedules** to view appointments for the selected users (this option is the same as the prior version of the calendar). The Schedule Settings link has been replaced by the settings “button” immediately above the calendar.
- New schedule settings on the calendar:
 - Added the ability to enable drag & drop of recurring appointments. This is called Enable Recurring Appointment Drag/Drop and by default is unchecked. Please note that only the currently selected appointment will be affected. All other appointments in the recurrence pattern will remain unchanged.
 - Added the ability to display canceled appointments in the calendar. This is called Display Canceled Appointments on Calendar and by default is unchecked. If checked, the canceled appointments will be shown with a strikethrough on the text.
- Nightly routines have been added which will automatically update the status of authorizations and the active flag on insurance coverages based on the termination/expiration dates.


Bug Fixes

- Creating a new appointment from an authorization that did not have an appointment type would sometimes clear out the authorization when the appointment type was subsequently selected.
- Fixed issue with multiple users opening and modifying a session at the same time. The scenario that was fixed is: One user opens a session in edit mode. While that user has the edited session open, another user completes the session. Then the original user saves the changes and session reverts back to the status on session from the original user.

- Fixed the error when creating a new task from the Home tab and assigning it to a different user. Previously, the task would save correctly; however, the user would see an error message.
- The scope on an appointment was left blank if a user quickly selected an appointment type and clicked save on slower devices.
- The units on a session were left blank if a user quickly selected a procedure that had minutes per unit and clicked save on slower devices. The prior workaround was to edit and resave the session. This should no longer be necessary.
- The Cancel button on new assessments and treatment plans created from a student record now returns the user back to that student record.
- Removed the ability to create new assessments or treatment plans from a completed session.
- Fixed the display of user names in the available resources of the calendar. User names with a space in the first or last name and those with an apostrophe were affected.
- Internet Explorer version 9 users were unable to delete appointments. This is now working correctly.
- Internet Explorer version 11 users were unable to generate the recurring appointment dates when creating a new appointment. This is now working correctly.

1.80 – September 28, 2013

New Features

- A Cancellation Reason has been added. This is required for appointments with a status of Canceled. All existing appointments that were canceled had the cancellation reason automatically set to Other. This will help your practice keep track of why appointments are being canceled.
- The cancellation/deletion options for appointments have been improved. Now, when canceling/deleting multiple appointments, you can choose the current appointment date and all future dates, or you can select all dates, regardless of the current appointment date. This now allows you to delete all appointments in a recurrence pattern without having to open the first appointment in that pattern.
- Added a new field called Non-Billable to appointments types. If checked, then appointments with this type cannot have a session created and they also cannot have an authorization selected. This will allow you to schedule Student (Therapy) appointments that should not be billed.
- If an insurance plan has authorized procedures, then only those procedures will be visible when selecting a procedure on an authorization or a session linked to that insurance via an authorization. Previously, any procedure could be selected, but the user would be prevented from saving the authorization or signing-off on the session.
- An icon  has been added to recurring appointments in the calendar to give a quick, visual indicator.
- The insurance priority (e.g. Primary, Secondary) has been added to authorizations.

- The ability to create tasks from authorizations has been added.
- New reports have been added including: Canceled Appointments and Student (Therapy) Appointments w/out Session. Additional reports for the clinical portion have also been created.
- A Clone button has been added to allowable procedures enabling quicker creation of multiple codes.

Bug Fixes

- When creating a recurring appointment the From Date will no longer be the first appointment date if it is not part of the recurrence pattern. Previously, it would always be the first appointment date generated, regardless of the pattern.
- The Recommendation field was not shown when viewing a general recommendation from a treatment plan.
- Insurance coverage on the authorization now only allows insurance for that student to be selected. This was only an issue when editing an existing authorization.

1.73 – August 31, 2013

New Features

- The Clinical (ABA) assessments, treatment plans, and lessons have been added to the application. This is still in beta testing, although it is safe to use. Please contact us at support@inviscidsoftware.com for further details including enabling this for specified users.
- Added a Default Location to the schedule settings for a user. If selected, the location on new appointments created by the user will default to this location.
- Added a Default Location to Appointment Types. If selected, when the appointment type is selected, the location will be automatically set to the default location of that appointment type. This will override user's default location setting.
- Added Print Assigned To Appointments to the appointment view page. This launches a report of all future, scheduled appointments for the specified assigned to.
- Added the ability to select/deselect all Available Schedules on the calendar via the Check / Uncheck All checkbox. The Add Schedules button still needs to be clicked for the changes to take effect.
- The number of Sessions, Time Tracking and Expense Tracking records linked to the appointment with a scope of Non-Student is now also displayed on the Calendar.
- Removed the ability to create related records for students flagged as inactive. The only exception is payments which now have a warning if the student is inactive.
- Removed the ability to drag & drop recurring appointments in the calendar. Recurring appointments may still be edited; however, changes only effect the existing appointments and not the other appointments in the recurrence pattern.
- Duration now appears in the appointment popup from the calendar.

Bug Fixes

- If a session was created from the list, the time in/out date would be set to today's date instead of the date on the appointment. This will now be set to the date on the appointment.

1.62 – July 18, 2013

New Features

- The number of Sessions, Time Tracking and Expense Tracking records linked to the appointment can now be displayed on the Calendar. This is enabled by going to your Schedule Settings and clicking on Display Associated Record Counts. These are displayed at the end of the appointment with just numbers. For example, 1/0/2 means there are one session, zero time tracking and two expense tracking records. These fields may also be used in the Appointments lists and corresponding reports.
- New Custom Links in the sidebar. The sidebar is the section on the left of TotalABA that contains Recent Items that can be expanded / collapsed on almost every tab. The Custom Links section has the following items and will be updated as needed:
 - Support – This contains several tabs:
 - On-Line Training – Contains links to our training videos and documentation.
 - Release Notes – Has a link to these release notes.
 - Contact Inviscid Software – Lists the various ways to get in touch with us.
 - MRC Support – Contains the Medical Reimbursement Consultants contact information. Also has links to their various forms like adding new users to TotalABA.
 - Settings – Currently this contains the Schedule Settings which are also accessible via the Calendar tab.

Bug Fixes

- Private Pay Sessions did not have the same requirements for sign-off as those that were flagged as Send Billing Message. This has been corrected. Now, the following are required to sign-off on a private pay session: Diagnosis Code 1, Procedure Code, Units must be greater than 0, a Billing Provider, Clinical Information (Activity, Progress, Impressions).
- On a Session, the Time Out now must be greater than the Time In. Previously this was not required and would result in the units being set to 0.
- Setting the Billing Provider to blank on the Student record now synchronizes with Renaissance and vice versa. Previously only synched when a Provider was selected.

1.58 – June 26, 2013

New Features

- Added Print Student Appointments button to student view page. This launches a report of all future, scheduled appointments for the specified student.

Bug Fixes

- Fixed error when selecting a Student with an apostrophe in their name (e.g. O'Connell).
- Calendar Bug Fix - Problems with displaying appointments in the calendar that had a start time before the user's view start time setting.

June 9, 2013

New Features

- Any Assigned Therapists on the student record are now highlighted in the resource view when accessed from the Student Calendar.
- New permissions for use with Basic User security group.
 - Modify Appointment Types
 - Modify Associated People
 - Modify Expense Categories
 - Modify Time Categories

Bug Fixes

- Delete and cancel appointment now return to correct pages.

1.47 – May 19, 2013

New Features

- A Print Schedule feature that has been added to the various views in the Calendar. This will allow for the appointments for the current view to be printed.
- A new security group called Basic User. Previously, all users had to be part of one of four groups: Administrator, BCBA, Office Staff or Therapist. In all cases you were not able to restrict create/modify access to certain record types like an appointment or a student. The Basic User security group only gives users view access to the various record types in TotalABA. However, the Basic User can be given create/modify access to the record types if desired. See [Inviscid TotalABA Security](#) for further information.

Bug Fixes

- Deselecting recurring on a new appointment created a single appointment (this is correct). However, the recurrence pattern that was previously set was saved on the appointment detail, it should be blank.
- Inactive therapists were showing up as a selection on a session.
- Inactive users were showing up as a possible selection on the assigned to of an appointment.
- A procedure code cannot be selected on an authorization if the corresponding insurance has allowable procedures and the selected procedure on the authorization is not listed.

1.42 – February 27, 2013

New Features

- The ability to create recurring appointments is now available.
- Future appointments can now be deleted based on the student, assigned to or recurrence. Furthermore, these appointments may be either flagged as canceled or actually deleted.
- The day of the week is now displayed on the appointment view page and is also available in the appointment list and reports. For example, a list/report can now be created for appointments that occur on Tuesday.
- The Week, Month, Resource Week and Resource Month views in the calendar now have clickable headers. Clicking on the day in any of these views will open up the corresponding Day view.
- ABA treatment type procedure codes now support partial unit calculations. If there are any problems, please contact MRC to have this setup.
- The status of the appointment is now displayed on the student record in the appointment related list section.
- The date of birth picker on the student record has been improved to include the past 20 years.

Bug Fixes

- Calendar and IE10 compatibility.
- Authorizations with a start date in the future no longer have a status of expired.
- Appointments can no longer be deleted if they contain expense or time tracking records.
- Inactive users can no longer be assigned to appointments, expense tracking or time tracking records.