Contents

What's new in INCISIVE MD?

This release implements security improvements and industry best practices for safeguarding protected health information to meet the requirements of the HITECH Act. In addition, the application has been updated for the third quarter CCI edits, the Oregon and Washington workers compensation contracts, and other smaller improvements and corrections to INCISIVE MD.

Who should read these release notes?

If you are an INCISIVE MD user ...

Read this entire document for revised features included in this update.

If you are the clinic technical contact ...

No action is required to update the software if users have administrative privileges to update the \Program Files directory. The INCISIVE MD application will auto-detect and install the update when the user attempts to log into the application following the release of the update to your clinic. For clinics using terminal services, please contact INCISIVE Support for instructions on manually updating users' profiles.

HIPAA and HITECH Act Compliance

Previously, we worked with our customers to enable them to be compliant with the Health Insurance Portability and Accountability Act (HIPAA), Public Law 104-191. With the passage of the Health Information Technology for Economic and Clinical Health Act (the "HITECH Act") as part of the American Recovery and Reinvestment Act of 2009 (ARRA), Public Law 111-5, certain provisions of HIPAA that previously applied only to our customers now pertain directly to CrossCurrent. To meet our regulatory obligations to safeguard protected health information (PHI), we have completed an extensive security review, upgraded our offices and internal business processes, enhanced the security of the INCISIVE Data Center, and now provide additional security management within our INCISIVE applications.

The majority of this release improves user password strength and management, user permissions and options, and provides the ability of a new customer appointed MD Administrator to control and set all of these new security settings.

MD Administrator

Users can now be assigned two of three different privilege levels within INCISIVE MD; either *User* or *Administrator*. The third privilege level is *Support* and is assigned only to CrossCurrent employees. Since this is a new feature, during the upgrade one individual at each clinic will be grated Administrator privileges by INCISIVE Support. We will refer to this user as the clinic's MD Administrator. After the update, this user will also be able to designate other Administrator users. Customers will be notified either my email or telephone as to the new Administrator user at their clinic.

The MD Administrator can now perform all the security and user management tasks previously done by INCISIVE Support on behalf of customers. Administrator users can add, change, or inactivate users at their clinic. They can also lock, unlock, reset user passwords, and manage other user options.

Passwords

We have enhanced INCISIVE MD to use stronger user passwords. From your initial temporary password to your regularly changed password, all passwords must be:

- Between 8 to 20 characters in length
- Must contain at least one upper case letter, lower case letter, a number, and special character like $, #, %, *, or !
- Free of consecutive identical characters like "111" or "aaa"
- Have at least four characters changed when new passwords are created to prevent users from simply adding a character to an old password
- Not the same as a previously used password

In addition, passwords may not contain a string of characters that are the same as a user's first name, last name, or their User Name.

🖼️ Renamed Provider Group

The **Settings** navigation bar group has been renamed to **Provider**. Users with permission to the Provider group can now manage a surgeon's Diagnosis Codes, Spine Graft Substitutes, and Equipment Lists without having to plan or code a surgery. Users with surgery plan Add & Edit permissions will still be able to manage these lists while planning or coding a surgery.

When a list is selected, the associated **Tasks** will display and provide the ability to add, edit, or delete items from the selected list. For the Substitutes and Equipment Lists, users can import and export the entire list.

By default, only users with Office Manager and Physician clinic roles are able to view the **Provider** group. The MD Administrator can change this setting so that users with other clinic roles may have View, Add and Edit, or have Full Access permissions to the Provider tab.

Provider Options

For those providers who practice at a different location than the clinic address, the local MD Administrator can set a different address for INCISIVE MD documents like the surgery planner and fee ticket. The MD Administrator can also set the taxonomy code for the provider based upon the table below. In addition, two options can be set to append Modifier 26 on radiology services and turn off the ability to plan staged surgeries.

INCISIVE MD Available Taxonomy Codes

Adult Reconstructive Orthopaedic Surgery (Full Joint)	207XS0114X
Neurosurgeon	207T00000X
Orthopaedic Foot and Ankle Surgery	207XX0004X
Orthopaedic Hand Surgery	207XS0106X
Orthopaedic Sports Medicine	207XX0005X
Orthopaedic Surgery	207X00000X
Orthopaedic Surgery of the Spine	207XS0117X
Orthopaedic Trauma	207XX0801X
Pediatric Orthopaedic Surgery	207XP3100X
Physical Medicine & Rehabilitation (Physiatrist)	2081P2900X
Physician Assistant Surgical	363AS0400X
Podiatric Medicine &. Surgery Providers	213E00000X
Registered Nurse First Assistant	163WR0006X

🔲 New Practice Group

Users with Administrator privileges, such as the MD Administrator, will be able to view a new **Practice** navigation bar group for managing the clinic's address; Custom Treatments settings; Assistants, Facilities, Contacts, and Consultant lists; security settings for users and passwords; and user permissions and options.

Configuration Items

MD Administrator can now update their clinic's address and tax ID. This address is not used by the application for surgery plans, fee tickets, or audit payment worksheets. For those documents, the address of the provider is used.

No additional functionality has been added to **Custom Treatments**, it has only been moved to the **Practice** group for inclusion with other clinic level information and tasks.

Lists

The MD Administrator can now manage the Assistants, Facilities, Contacts, and Consultants lists without having to plan or code a surgery. Users with surgery plan Add & Edit permissions will still be able to manage these lists while planning or coding surgery. When a list is selected, the associated **Tasks** will display and will provide the ability to add, edit, or delete items from the list and also import and export the entire lists.

Security

We transferred user administration from an INCISIVE MD Server application used by INCISIVE Support to within the INCISIVE MD software our customers can now use. One individual will be given the permission to add, change, or inactivate users at each clinic. The administrator user can also lock, unlock, reset user passwords, and manage user options.

User Settings

Read the next section on managing user settings.

Password Policies

The MD Administrator can set a number of new password policies to enforce password management best practices. To turn the password policies on or off, the MD Administrator checks or unchecks the rule. The following policies can be set:
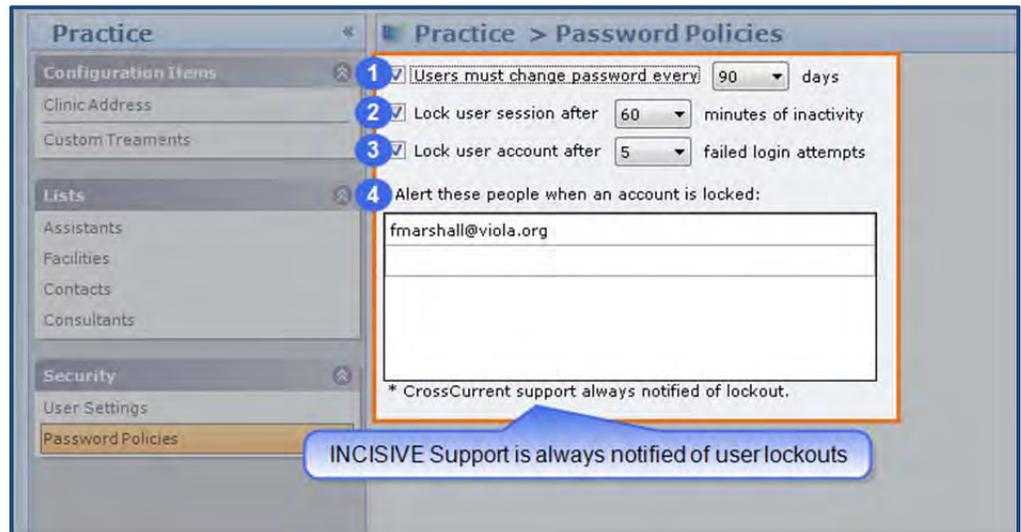
❶ **Forced Password Changes**. The software can be set to force users to change their password on a regular basis. The frequency when passwords must be changed can be from never to 365 days. Our suggested setting for this policy is every 90 days. The default setting is to have this rule turned off. The password change countdown clock is reset after each user successfully changes their password.

❷ **Idle Time-out**. After 30 minutes of idle activity, the software will return a user to the login screen. This setting can be changed from 1 minute to 480 minutes (8 hours). The default setting is 30 minutes.

❸ **User Lockout**. To prevent unauthorized attempts at gaining access to the INCISIVE MD software, the number of failed logins can be set to 3, 5, 10, or 20 attempted logins before a user account is locked out; the default is 5 failed attempts. Once an account is locked out, either the MD Administrator or an INCISIVE Support representative will be required to unlock the user's account.

❹ **Lockout Notice**. Once an account is locked out, an email will be sent to the user whose account is locked out as well as any other email addresses shown in the Alert Email List along with INCISIVE Support. The lock out email will provide the instructions on how a user can have their account unlocked.

To add additional email addresses, simply click in the bottom row in the **Alert these people when an account is locked** list and enter the email address. It will be automatically saved once you click out of the list.

User Management

You now have the capability to manage each individual users' password, privileges, permissions, and visible providers.

Users

Each created user for the clinic will be listed in alphabetically order by last name along with their user name. The default view shows only active users but can be changed by checking the **Tasks** > **Shows Inactive Users** option. In the navigation bar **Tasks** group, the MD Administrator can add new users, inactivate existing users, and do password resets.

🔒 Locked Users

Users failing to log in after the number of attempts set in the **Security** > **Password Policies** > **User Lockout** limit will have their account locked out. This prevents illegitimate users from gaining access to INCISIVE MD. Once an account is locked, only INCISIVE Support or the clinic's MD Administrator can unlock the user account. A locked account will be displayed with a lock icon next to the user's italicized name in the **Users** list. To unlock an account, simply check **Allow Log In (Unlock)** checkbox in the User section.
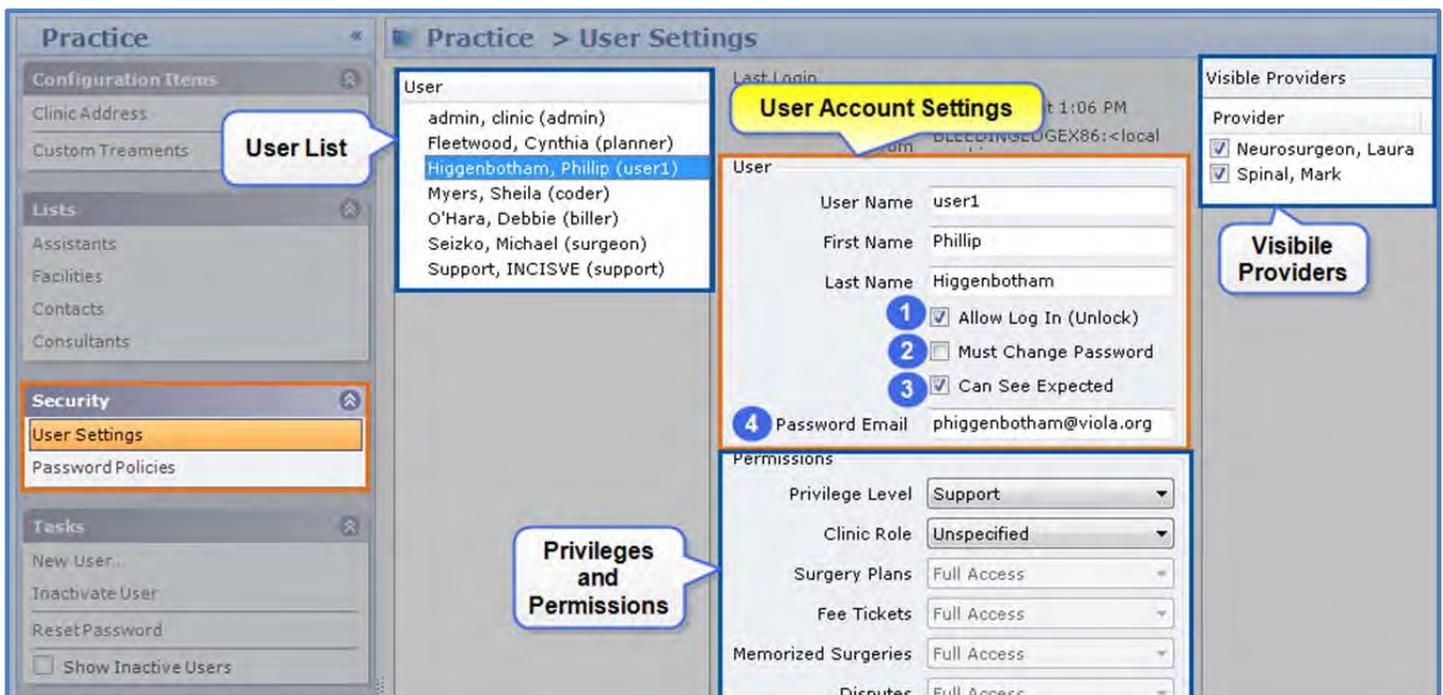
⛔ Inactive Users

To inactivate a user, click **Inactive User** under the **Tasks** group. This prevents a user from logging into INCISIVE MD and any of their security settings from being changed. Once a user has been inactivated, they will be removed from the **Users** list display until the **Show Inactive Users** option is checked under the **Tasks** group. With **Show Inactive Users** checked, inactive users will be displayed with a red restricted icon and their user name will be strikethroughed.

Last Login

This is an information panel that shows the last time the user account logged into INCISIVE MD and from what workstation. The **From** will show the computer name separated by a colon to show the Internet Protocol (IP) address of the workstation.

User Account Settings

You now have the ability to change user names and account first and last names without having to inactivate the current account and create a completely new user account. You can use the **Allow Long In (Unlock)** checkbox to control whether a user can log into INCISIVE MD.

❶ **Allow Log In (Unlock)**. When unchecked, the user account is locked. This will be come checked if **Inactivate User** task is clicked. Once inactivated, a user cannot be reactivated; you must create a new user account. To show inactive users, check **Show Inactive Users** in the **Tasks** group in the navigation bar.

❷ **Must Change Password on Next Login**. When checked, this will force a user to change their password at next login. The default setting for this is checked when creating a new user. The checkbox will also become checked if the **Reset Password** task is clicked.

❸ **Can See Expected Amounts on Summary Tab**. Controls whether or not the Expected Amount column is displayed on the Planning or Coding Summary tabs. For this update, the current setting stored on the INCISIVE MD server will be used. The default setting when creating a new user is to have this unchecked.

❹ **Password Email**. This is the email address where temporary user passwords will be sent for new and reset passwords. It is also the email address used for locked out account notifications.
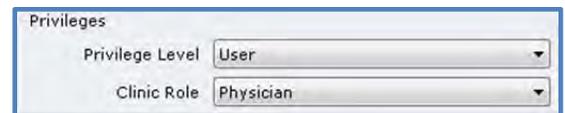
Visible Providers

The MD Administrator can select which INCISIVE MD providers a user may view. An unchecked box next to a providers name in the **Visible Providers** list causes that provider to be removed from the **Surgeries For** drop down list. During the upgrade, this setting will be set to check all the clinic's INCISIVE MD providers, as is the current behavior. When creating new users, the default setting is to allow users access to the entire list of INCISIVE MD surgeons.
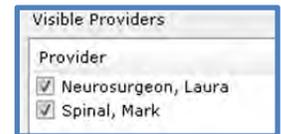
To remove the display of a surgeon from the **Surgeries For** drop down list, simply uncheck the box next to an INCISIVE MD providers name. This setting takes effect at the next logon of the user.

Privileges

There are two levels of privileges for INCISIVE MD users: *User* and *Administrator*. As one would expect, the Administrator privilege provides full access (View, Add, Edit, & Delete) permissions to all INCISIVE MD functionality. Administrator users will also be able to see the **Practice** navigation bar group. A clinic must have at least one designated MD Administrator but may have as many MD Administrators as needed. Users can also be granted full access permissions to all parts of INCISIVE MD but will be unable to see the **Practice** group.

The **Clinic Role** is provided as a convenience to MD Administrators to quickly set permissions for the various parts of INCISIVE MD. Each time a role is selected, the permissions will be reset to their default settings for that clinical role, see table below. The MD Administrator can change the default permission setting for any part of INCISIVE MD by changing the associated permissions drop down value. The legend below provides a description of each of the permission levels.

Permissions

The MD Administrator can grant specific permissions for each major part of INCISIVE MD. The table below provides the default permissions for each clinic role. The legend on the following page describes the rights provided for each permission setting.

Permissions	
Surgery Plans	View, Add, Edit, & Delete
Fee Tickets	View, Add, Edit, & Delete
Memorized Surgeries	View, Add, Edit, & Delete
Disputes	View Only
Patients	View Only
Contracts	View Only
Provider Settings	View, Add, Edit, & Delete
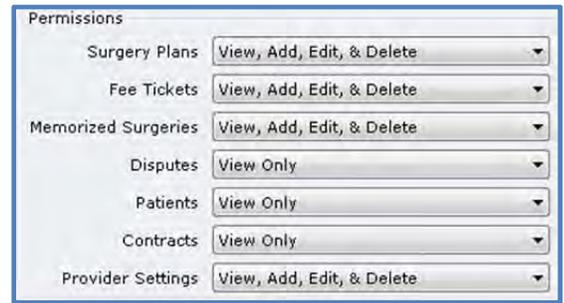
Clinic Roles Default Permissions

Clinic Role	INCISIVE MD Navigation Bar Group						
	Surgeries			Disputes	Patients	Contracts	Provider Settings
	Surgery Plans	Fee Tickets	Memorized Surgeries				
Biller	○	◖	☒	●	○	◖	☒
Coder	○	●	○	●	○	○	☒
Front Desk	○	☒	☒	☒	○	☒	☒
Medical Asst	◖	◖	◖	☒	○	○	☒
Office Mgr	●	●	●	●	●	●	●
Physician	●	●	●	○	○	○	●
Scheduler	●	○	◖	☒	○	☒	☒
Unspecified	☒	☒	☒	☒	☒	☒	☒

Legend

Icon	Permission Level	Permissions Description
☒	Prohibited	A user cannot view, change or use this item. If all items under a navigation bar group are prohibited then the application will display a message that the user does not have sufficient permissions to view that group.
○	View Only	A user can only view documents related to this item. Neither can a user start a task or edit an item.
◖	View, Add, & Edit	A user can start new items, edit completed items, but cannot delete existing items.
●	View, Add, Edit, & Delete	Can view, add, change, and *delete* items. If a user has Administrator, privileges they automatically are granted Full Access permissions to all items.

User Tasks

New User

Under the **Tasks** group, click **New User...** and complete all the fields to create a new user. You cannot save a user without providing an email address for the user. The INCISIVE MD server will automatically create a temporary password for the user to change upon their first INCISIVE MD login. Passwords can no longer be set for users by INCISIVE Support. A new user email will be sent to the provided email address along with instructions on logging in.

Inactive User

Click **Inactivate User** to discontinue a user's access to INCISIVE MD. This prevents any of their security settings from being changed.

Alternatively from inactivating a user, the MD Administrator can turn off a user's access to INCISIVE MD by simply unchecking **Allow Log In (Unlock)** checkbox under the user's account settings.

Reset Password

If a user forgets their password, the MD Administrator or INCISIVE Support can reset the password. A new temporary password will be generated for the user and will be sent to them in an email. The user will need to change this password on first log in. To reset a user's password, click **Reset Password**.

Show Inactive Users Option

Once a user has been inactivated, they will be removed from the **Users** list display until the **Show Inactive Users** option is checked. With **Show Inactive Users** checked, inactive users will be displayed with a red restricted icon and their user name will be strikethroughed.

New Treatments

The following treatments have been added to INCISIVE MD at surgeon request.

Internal Auditory Canal Decompression

Treatment Name	Internal Auditory Canal Decompression
CPT Codes	69960
CPT Description	Decompression internal auditory canal
Treatment Locations	Head and Neck > Ear
Location Display	Temporal Bone
Treatment Group	Incision
Supplemental Codes	None
AMA CPT Bundling	None
Supplies & Equipment	None

Temporal Bone Tumor Removal

Treatment Name	Tumor removal
CPT Codes	69970
CPT Description	Temporal Bone tumor removal
Treatment Locations	Head and Neck > Ear
Location Display	Temporal Bone
Treatment Group	Excision
Supplemental Codes	None
AMA CPT Bundling	None
Supplies & Equipment	None

Presacral Tumor Removal

Treatment Name	Sacrococygeal tumor excision
CPT Codes	49215
CPT Description	Excision of presacral or sacrococcygeal tumor
Treatment Locations	Spine > Lumbosacral
Location Display	Sacrum
Treatment Group	Excision
Supplemental Codes	None
AMA CPT Bundling	None
Supplies & Equipment	None

Barium Enema Contrast Exam

Treatment Name	Barium enema contrast
CPT Codes	74270
CPT Description	Radiologic examination, colon; contrast (eg barium) enema, with or without KUB
Treatment Locations	Imaging
Location Display	None
Treatment Group	Assistive
Supplemental Codes	None
AMA CPT Bundling	None
Supplies & Equipment	None

Eight Diagnosis Codes

With the march towards 5010, the number of billable diagnosis codes is increasing. This is critical for in many instances for trauma cases where as many 24 diagnosis codes may be required to diagnostically code the surgery. We have increased the number of selectable diagnosis codes from four to eight, as this is the maximum for the 4010A1 electronic claims standard. The 2011 end of year release will support 5010 and allow up to 24 diagnosis codes.

> ⚠️ Users may select up to eight diagnosis codes but are cautioned that all eight codes will get displayed on the Planning and Coding **Summary** tabs and may require users to scroll left and right to check the appropriate diagnosis code for the treatment. In addition, the **Diagnosis Codes** list box on the Summary tab will only display four diagnosis codes and so users may not realize that they need to scroll through the list to see the other selected diagnosis codes.

CCI Edits Update for Version 17.2

We updated the INCISIVE MD Server in the first week of July for the National Correct Coding Initiative (CCI) Version 17.2 (third quarter) update. The total number of CCI edits is now 711,532. This version of the CCI edits adds 2,367 new edits while 336 have been terminated. Nearly all of these edits do not affect orthopædic procedure codes.

CrossCurrent Managed Contracts

Concurrent with this release, the Oregon and Washington workers compensation contracts have been updated on the INCISIVE MD server. For those interested customers in the Pacific Northwest region, these new contract terms will be added to their INCISIVE MD databases and should be viewable by these customers by August 1. To see if any existing contract would be affected by this change, users with permissions to edit Contracts may view a contract change report.

Oregon Workers' Compensation Medical Fee Schedule

As continues from last year, the Oregon Workers' Compensation Division has continued the move away from a standard RVU type contract. The new contract term will be a fee-based contract that lists the individual maximum allowable amounts for facility and non-facility settings. As such, no comparable conversion factor can be provided.

Washington Labor & Industry Medical Fee Schedule

The conversion factor for 2011 Washington Labor & Industry medical fee schedule was reduced to $55.34 and no cost of living adjustment was made. The conversion factor is also adjusted by a geographical price adjustment to the RVU values. All these changes are reflected in the calculated Expected amount.

Other Application Corrections and Improvements

Since it has been several months since the last general release, several issues have been fixed in the interim. This list below is not exhaustive but provide the most significant changes that effect users.

Import and Export Memorized Surgeries

Along with the other changes made to the **Provider** group, customers can now export memorized surgeries and import them for use by other providers. Under **Surgeries** in the **Memorized Surgeries** group, you will now see and **Import...** and **Export...** buttons. Clicking either of these buttons will open a file dialog to either store or retrieve the memorozied surgeries. Each memorized surgery will be exported and named as shown in the memorized surgery list. Memorized surgeries that are for staged surgeries will have each stage saved separately. When exporting and importing memorized surgeries between providers, remember to switch the **Surgeries For...** name before importing.

Missing AMA PPI Settings Corrected

The following treatment codes payment policy indicators (PPI) have been updated for the AMA CPT PPI table. We copied the values from the current Medicare PPI table for these new, revised, or deleted treatment codes. This corrects a problem specifically with the new Anterior Cervical Decompress and Fusion (ACDF) treatment (CPT 22551/22552) where a user would not have been presented with assistant-at-surgery checkbox under the Assistants name on the **Summary** tab **Procedures** grid.

11040	11041	20000	22551	22552
29914	29915	29916	61781	61782
61783	64566	64568	64569	64570
64573	76880			

Unable to choose Structural Autograft (CPT 20938) with new ACDF treatment

Users can now select structural autograft from the list of optional right-hand side graft codes when the new ACDF treatment with a location is selected.

Coding Edits Tab Usability Improved

Several versions ago, we revised the Summary tab treatment descriptions for general orthopædic codes to include the morphological location of treatment; for example, Left Medial Meniscus Arthroscopic Meniscectomy. This had the unfortunate side-effect of have this information be displayed twice on the **Code Surgery** > **Coding Edits** tab under both the **Location** and **Description** columns. We have changed the display of the **Description** column to not include the location information; the treatment name will only be displayed.

Missing Payment Policy Indicators for Illinois Workers' Compensation Contract

The Illinois Workers Compensation Commission (IWCC) *Medical Fee Schedule Payment Guide to Global Days* has not been updated since the Commission adopted the new rules in 2006. As such, new AMA CPT procedure codes from 2007 through 2011 will not be listed in the guide. This guide indicates the rules around the use of Modifiers 50, 51, 62, 66, 80/AS, 81, and 82. In the INCISIVE MD 3.5.0 release in January, we made a change based upon some physician feedback as to when the Assistant checkbox should be displayed. Without getting to technical, the application no longer displays the Assistant checkbox when it unlikely that an assistant would normally be needed for the procedure. Previously, we generously allowed the Assistant checkbox with a note about it needing to be medically necessary. The feedback was that it in most cases these situations the do not warrant assistants so INCISIVE MD was changed to not display the Assistant checkbox since customers most likely would not get paid by a payer.

It appears that the unfortunate side effect of this change was that since all the new CPT codes from 2007, 2008, 2009, 2010, and 2011 are not listed in the IWCC *Payment Guide to Global Days* that the application will not show assistants for any of these new procedures. In these situation where an AMA procedure code has been added since 2006 and no data is provided by the ILWC PPI table, INCISIVE MD will use the Medicare PPI settings for that treatment.

How do I contact INCISIVE Support?

During normal business hours, 8:00 am to 5:00 pm Pacific Time, you may contact technical support at (503) 546-5323 or by email at support@crosscurrentinc.com. Our INCISIVE MD Support website also offers resources to help answer basic questions about the software.