Kofax Medical Claims Add-on 2.5.0 for KTT

Release Notes

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Preface

This guide contains information about installing Kofax Medical Claims Add-on 2.5.0 for KTT and assumes that you have a thorough understanding of Windows standards, applications, and interfaces.

This guide is for solution integrators who are installing Kofax Medical Claims Add-on 2.5.0 for KTT or who need a description of the installation procedures and requirements.

If you downloaded the Kofax Medical Claims Add-on 2.5.0 for KTT from the Kofax Electronic Delivery site, you can extract the files from the zip file. Refer to the instructions on the Site. Or, you may have received the Kofax Medical Claims Add-on 2.5.0 for KTT as a package that includes electronic media.

Related Documentation

In addition to these Release Notes, Kofax Medical Claims Add-on 2.5.0 for KTT includes the following documentation.

Kofax Medical Claims Add-on 2.5.0 for KTM Getting Started Guide
Information about installing and configuring the Medical Claims Add-on is available in this guide.

Important The installation instructions that involve integrating the Kofax Medical Claims Add-on 2.5.0 for KTT with Kofax Capture can be ignored when using Kofax Transformation Toolkit.

Training

Kofax offers both classroom and computer-based training that will help you make the most of your Kofax solution. Visit the Kofax Web site at for complete details about the available training options and schedules.

Chapter 1

Introduction

This set of release notes contains important information not included in other Medical Claims Add-on documentation. Please read these release notes carefully before you install, upgrade, or use this product.

Information about supported operating systems and other Kofax Transformation Toolkit requirements is available on the Kofax Support Web pages at www.kofax.com.

Important In order to use this project in production, you need the Medical Claims Add-on license.

Chapter 2

New Features

This release sections describe the new features for Kofax Medical Claims Add-on 2.5.0 for KTT.

All-New Scripted Registration

The registration process has been improved to be more comprehensive and robust to shift and stretch, and is more visible and customizable in script.

Blank Date Fields Populated Automatically when Empty

If the "Date To" field is left blank on a document, it is populated automatically with the value in the "Date From" field. If for any reason, this automatic copy is unsuccessful, there is also a button on the validation form so that the user can copy the value easily. (SPR00096926)

Creation and Deletion of an Overlay On Demand

The Validation user can now create an overlay, that is a superimposed background for documents whose red background was removed by the scanner, on demand. After the user selects some data points in the Document Viewer, Validation creates the overlay at the required scale. The resulting grid coordinates can be used if the document is re-extracted.

In addition, the Validation user can now delete the overlay.

Fully-Registered Overlay

The project dynamically adjusts the overlay at runtime to fit over a document that has been stretched or skewed.

Handling for Non-Standard Documents

This project supports two standard forms (CMS1500 and UB04) but non-standard forms are commonly misplaced in the production batch. In earlier versions, these required rejection or deletion. Now, a user can manually classify these documents to a temporary class, and they can be released using a separate export connector or routed to a separate batch class for processing.

Hotkeys

Several new hotkeys have been added to the validation form to aid in clearing field data as follows.

F6

Clears the selected field data and preserves its coordinates. (SPR00097290)

F7

Clears all cell data in the current table and preserves its coordinates. (SPR00097291)

F8

Clears all field data on the current tab and preserves all field coordinates. (SPR00097292)

CTRL + F8

Clears all field data on the document and preserves all field coordinates. (SPR00097293)

Improvements to Document Registration

A new line detection technique provides an effective fallback method to locate extraction zones if OCR anchors cannot be found on black and white (non-dropout) CMS1500 and UB04 forms. (SPR00092760)

For OCR registration, a smaller and more carefully chosen set of data points are required to determine extraction coordinates, improving speed and reliability. (SPR00092761, SPR00092759)

Invalid scale factors are detected and discarded, and fallback extraction coordinates are now selected based on the size of the document being processed.

Improvements to Validation User Experience

Many improvements have been made to the Validation user experience so that documents can be corrected more quickly and accurately. For example, newly-added formatters and restricted-content drop-down lists limit data entry errors. Field labels and positioning have been improved, as well as table scrolling and column resizing. Hotkeys for clearing field text and buttons to copy data into fields have also been improved.

Locator Method Documentation

A more in-depth description of the project and its locator methods has been added to the Medical Claims Add-on Kofax Medical Claims Add-on 2.5.0 for KTT Getting Started Guide. (SPR00084931)

Multiple Page Documents

The Medical Claims Add-on Kofax Medical Claims Add-on 2.5.0 for KTT now supports documents with multiple pages.

Multiple Resolution Images

The Medical Claims Add-on Kofax Medical Claims Add-on 2.5.0 for KTT now supports images of different resolutions.

PDF Documents and Color Images

The Medical Claims Add-on Kofax Medical Claims Add-on 2.5.0 for KTT now supports PDF documents and color images.

Re-Extraction of Documents

Users can now send documents back to the beginning of the workflow for re-extraction, after providing some information to ensure that the extraction performs better the second time around. This means that documents that were incorrectly classified, have incorrect data, or are missing data, no longer need to be manually re-keyed, rejected, or deleted.

Chapter 3

Changes in Behavior

The following features function differently than they did in previous versions.

Change to Amount Formatting

The default amount formatter is no longer in use. Using a custom amount formatter, all amounts are formatted to two decimal places and empty amount fields are formatted to "0.00."

Changes to Image Cleanup Technique

A problem with the image cleanup technique in previous versions meant that data was often missed, and header words from the form would be included with the field data. (SPR00096924)

The image cleanup technique has now been simplified, and this data is no longer lost.

Changes to OCR Registration Anchors

The OCR anchors required to register the black and white forms have changed so that they can be found more easily. Also, the central anchor is now optional and forms can be registered using just the vertical and horizontal anchors. (SPR00092761)

CMS1500 Anchors

Vertical Anchor: "MEDICARE" (formerly "1.MEDICARE")

Horizontal Anchor: "TOTAL" (formerly "28.TOTAL")

Central Anchor: "SIGNATUREOF" (formerly "31.SIGNATURE")

UB04 Anchors

Vertical Anchor: "REVCD" (formerly "42REVCD")

Horizontal Anchor: "OPERATING" (formerly "77OPERATING")

Central Anchor: "REMARKS" (formerly "80REMARKS")

Five-Page Overlay Creation Limit Removed

The restriction to limit overlay generation to just five pages per document has been removed. Overlays are now created for all pages as required. (SPR00092917)

Requirement for Document Review

By default, the Medical Claims Add-on requires that Document Review control is present in the workflow, due to the new re-extraction feature.

For the best results, the default solution should be used for most projects, so you can ensure document classification and separation is correct at the time of extraction.

Chapter 4

Resolved Issues

The following section describes resolved issues in Kofax Medical Claims Add-on 2.5.0 for KTT.

Address Parsing is Unreliable

The function that parses the City, State, and ZIP Code for address fields has been updated so it is more tolerant of extra spaces and characters, as well as identifies and combines multiple name and address lines. It also finds regular ZIP and ZIP+4 codes, interleaved telephone and fax numbers, as well as country codes. (SPR00092999)

Blank-Out Regions Present in RED Zones

Blank-out regions have been removed from all Advanced Zone Locators for red-dropout forms. (SPR00092763)

Changes to OCR Registration Anchors

The OCR anchors required to register the black and white forms have changed so that they can be found more easily. Also, the central anchor is now optional and forms can be registered using just the vertical and horizontal anchors. (SPR00092761)

Clean up Overlay Files Before Export

Overlay files are now deleted whenever document routing occurs and after the batch is closed for the final time. (SPR00096942)

Database Input

Database queries that check codes against a database are now formatted to remove unwanted characters before the lookup. (SPR00085016)

The database name referred to by the script is now correctly named. (SPR00069940)

Empty “Date To” Value Populated with “Date From” Value

Because the “Date To” value can be left blank if it is the same as the “Date From” value, the empty field is copied automatically from the “Date From” field during processing. If this copy is unsuccessful or incorrect, there is also a button on the validation form so the user can copy the value easily. (SPR00096926)

Error During Overlay Export for Documents with Attachments

The project no longer attempts to copy non-existent overlay pages over the original images, and errors are no longer observed for documents with attachments. (SPR00092918)

Extraction Confident Flag Overwritten for all Fields

The script code is no longer overriding the extraction confident flag on every field. The function that sets field confidence has been updated so it sets a field confident only if it is blank. (SPR00092764)

Extraneous Files Removed

The project no longer attempts to copy non-existent overlay pages over original images, and errors are no longer observed for documents with attachments. (SPR00084933, SPR00084918)

Field Labeling Improved

Any fields with missing labels have been labeled. (SPR00097295)

Field Name Duplicated

A header field and a table field used the same field name of "OtherID." Duplicate names are not supported, even when they are different field types, so the header field has been renamed to "OtherIDNum." (SPR00092919)

Field Size and Alignment Improved

Fields and groups are now aligned in a consistent manner. (SPR00097294)

Five-Page Overlay Limit is not Practical

The five-page overlay limit is no longer applied. The project has been modified to allow an overlay to be generated for any classified healthcare page. (SPR00092917)

Formatters to Remove Unwanted Characters

Formatting has been reintroduced to restrict the data that can be extracted and entered by the Validation user, and ensure that the fields are of the correct format for export. (SPR00092793)

Horizontal Scrolling on UB04 Documents

The "Total Covered Charges" and the "Total Non-Covered Charges" fields have been moved below the "Page Count" fields in order to eliminate the need to scroll horizontally to view the entire form. (SPR00097299)

Horizontal Scrolling in Tables

Tables on CMS1500 documents have been widened and the table columns have been changed to size automatically based on their contents. The result of these changes means that users are no longer required to use a horizontal scroll bar to view table contents. (SPR00097296)

Image Cleanup is Unreliable

The Image Cleanup code has been simplified to run a profile and custom rules on the full page and table area, as well as an adjusted Advanced Zone Locator to look for data in narrow field zones that are below the field header text. (SPR00096924)

Incorrect Red Samples

The documents stored in the samples folder are now correctly sorted into the correct folders for locator method reference documents. (SPR00084929)

Installation Instructions

The installation instructions have been updated to account for both 32-bit and 64-bit operating systems. (SPR00069927, SPR00069939)

New Buttons to Copy Patient Data to Other Fields

If the "Insured" or "Other Insured" field values require the same data as the "Patient" field values, the Validation user can click new buttons on the validation form to copy the data instantly. (SPR00096927)

OCR Performed at Wrong Time for Black and White Documents

OCR is now run from script in the "BeforeExtract" script event to ensure consistent results are observed during the testing of extraction in Project Builder without classification. (SPR00092758)

Overlay Information not Available for Document that Failed Classification

It is now possible for a Validation user to lasso the registration anchors and create a scaled overlay for documents that were incorrectly classified or failed registration due to missing anchors. (SPR00055344)

Patient and Insurance Data

Patient data, insurance data, and other insurance data are now located on a single tab. This enables users to cross-validate this data quickly and easily. (SPR00097298)

Registration Relies on Optional Field

Registration for CMS1500_RED documents no longer relies on the SSN/EIN box being checked on the form. This was previously used as an anchor point, but this check mark is optional according to the CMS1500 rules. Now, the project locates the first line of the table, a required field on the form, as an anchor point. (SPR00092759)

Table Header Extraction

During extraction, the header rows on CMS1500 forms are no longer incorrectly extracted as table line items. Additionally, empty lines with pre-printed line numbers are no longer incorrectly extracted on non-dropout forms. (SPR00055343)

UB04 Address and City Zones Wrong Way Around

The location of the Address zone and the City zone have been corrected on the UB04 form so they correctly reflect the physical layout and data on the form. (SPR00096986)

UB04 Classification

Errors are no longer encountered during production when classifying documents. (SPR00056407)

More UB04 documents are now classified because the classification training set has been expanded to include atypical documents of this type. (SPR00056429)

UB04 Table Locator

It is now possible to open and configure the Table Locator for the UB04 class without errors after it was updated with new extraction techniques. (SPR00084932)

Vertical Scrolling in Tables

Tables on UB04 documents have been condensed to fit on screen. The result of these changes means that the vertical scroll bar is now more accessible for viewing table contents. (SPR00097297)

Chapter 5

Known Issues

This following sections describe known issues, and if available, useful workarounds for Kofax Medical Claims Add-on 2.5.0 for KTT.

Multi-Field Validation Rules

Fields need to be validated in a specific order to ensure that scripted validation rules are executed when field data is updated. Table fields need to be validated prior to other fields in order for the multi-field validation rules to run. (SPR00055348)

Workaround: Validate the table lines in the "Patient DoB" and "Covered Charges" fields before any other fields on the document. Once the rest of the document is validated, you can make no additional changes to the table fields.

PDF Documents and Overlay

The Overlay feature cannot be used for PDF documents.