RELEASE NOTES: 03/15/2024.
Monthly Service Pack – SC.CORE.6.0_1.19.000.2402.009

Executive Summary:

1. To have the records consistently mapped to the correct Client Program entry, the CDAG logic is modified to consider Client Program ID instead of Program ID. With this change, the scanning, Batch Scanning, Documents, Treatment Team, Disclosure/Requests, Flowsheet, Client Flags, Life Event, Grievance/appeals, Contact Notes, Orders, DFA List and Details Pages, Core RDLs modules are done with Client Program Id implementation. (EII # 124828, EII # 125748, EII # 125749, EII # 125750, EII # 125751, EII # 125753, EII # 125754, EII # 125773, EII # 125819, EII # 126196, EII # 126757)
2. Mode Of Delivery is added to Procedure Code Details and Location Details screens. This is implemented in order to prevent documenting Services with Mode Of Delivery and Location, Procedure choices, that are invalid for the Service Procedure, being recorded. (EII #126598 and EII # 126599)
3. The Change is done in the 'Save As Template' feature to include 'Instruction Text' in RX application. (EII#126837)
4. The logic is updated to create Bed services for both same Day Admit/Discharge scenario and Create a Service on Date of Discharge scenario. (EII #126172 & EII #126173)
5. A Custom hook has been added to 'Core TEDS Data Set' document to display the 'Custom Fields' tab for state core 'Core TEDS Data Set' document. (EII #126816).
6. Implemented a Crossover Claims logic for 'Do Not Bill' during transfer to Secondary coverage plan in the charge details. (EII #125735).
7. ~~Implemented a Conversion Logic for ml, to display in mg unit in MAT screen, for Dosage change. (EII #124724).~~
8. ~~Implemented a new 'MAT Destroyed Inventory by Bottle' report for the destroyed medications in DFA report. (EII # 124358)~~
9. ~~Added 'Destroy' option in 'Reason' dropdown field in Medication Inventory Transaction Detail Screen. This is to destroy a stock bottle of medication when a bottle has been contaminated or contains expired medication. (EII # 124643)~~
10. ~~This implementation is done to generate recorded services based on the MAT Medication Dispense. (EII # 125449)~~
11. ~~A 'MAT Lighthouse Report' is implemented. This Report is a mechanism for reporting essential information about MAT clinics to an approved Central Registry, as mandated by federal requirements. (EII # 124361)~~
12. Implemented a new document 'CAMS SUICIDE STATUS FORM–4 (SSF-4)' to understand the route that causes suicidal thoughts in the client, session by session in a single document. (EII # 124444)

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Abbreviation: EII - Engineering Improvement Initiatives

Contents

TASKS SUMMARY – 'CHANGE' RELATED (24)

Sl. No	Task No	Summary	Module Name
11	EII # 125735	Implemented a Crossover Claims logic for Do Not Bill during transfer to Secondary coverage plan in the charge details.	Charge Details
28	EII # 125750	Implementation to modify CDAG logic to consider ClientProgramID instead of ProgramID in Client Flags and in Contact Notes.	Clinical Data Access Groups (CDAG)
29	EII # 125748	Treatment Team: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
30	EII # 125749	Flow Sheet: Implementation to modify the CDAG logic to display Programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
31	EII # 125751	Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId' in Client Order and Quick Order details screen	Clinical Data Access Groups (CDAG)
32	EII # 125753	Scanning: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
33	EII # 125754	Grievances and Appeals: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
34	EII # 125819	Documents PDF: Implementation to modify the CDAG logic to display program names based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
35	EII # 126757	Clinical Data Access Control: Core Documents: Initialization of the data Program to Program based on 'ClientProgramId' instead 'ProgramId'.	Clinical Data Access Groups (CDAG)
36	EII # 125773	Documents: CDAG Framework changes: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
37	EII # 126196	Disclosure/Requests, Life Event: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.	Clinical Data Access Groups (CDAG)
38	EII # 124828	Implementation to Add a filter & column for program in 'Documents (Client)'	Clinical Data Access Groups (CDAG)
~~40~~	~~EII # 126831~~	~~Custom hook has been added to the files to generate NY PAS 26 Reporting and NY PAS 126 Reporting.~~	~~Compliance Core~~
45	EII # 126816	Custom hook has been added to 'Core TEDS Data Set' document to display the 'Custom Fields' tab for state core 'Core TEDS Data Set' document.	Documents
68	EII # 126598	Location Details: Mapping Mode of Delivery tab is added.	Manage Available Locations
~~70~~	~~EII # 124724~~	~~MAT: Implementing a Conversion Logic for ml to display in mg unit.~~	~~Methadone~~
~~71~~	~~EII # 124643~~	~~Added 'Destroy' option in 'Reason' dropdown field in Medication Inventory Transaction Detail Screen.~~	~~Methadone~~
~~72~~	~~EII # 125449~~	~~Changes are implemented to generate recorded services based on the MAT Medication Dispense.~~	~~Methadone~~
~~74~~	~~EII # 1787~~	~~Methadone API integration in SmartCare.~~	~~Methadone~~
80	EII # 126570	Custom Crossover Claims logic for 'Do Not Bill during transfer to Secondary'.	Plans

84	EII # 126599	Changes in the 'Procedure Code details' screen for the Mapping 'Mode of Delivery'.	Procedure/Rates
85	EII # 126173	A new checkbox 'Create Service on Date of Discharge' has been implemented in the categories section of the general tab under the program details screen.	Programs
95	EII # 126837	RX: Changes in the 'Save As Template' feature to include 'Instruction Text'.	Rx Application
103	EII # 126172	Add the ability to record bed services.	Services

TASKS SUMMARY – 'NEW FUNCTIONALITY' RELATED (4)

Sl. No	Task No	Summary	Module Name
46	EII # 124444	Implemented the 'CAMS SUICIDE STATUS FORM–4 (SSF-4)' and 'CAMS Therapeutic Worksheet: Understanding Your Suicidality' documents.	Documents
~~73~~	~~EII # 124361~~	~~Implementing a new 'MAT Lighthouse Report'.~~	~~Methadone~~
~~94~~	~~EII # 124358~~	~~DFA Report: Implementation of new 'MAT Destroyed Inventory by Bottle' report for destroyed medication.~~	~~Reports~~
102	EII # 125450	Service and Service/Notes screen: Implementation for Mapping Mode of Delivery to Location and Procedure code details which has been set up through the 'ServiceDropdownConfigurations' table.	Services

TASKS SUMMARY – 'DEFECT FIXES' (92)

Sl. No	Task No	Summary	Module Name
1	Core Bugs # 127048	Activity Timeline list page displays Special Characters and is not exporting data.	Activity Timeline
2	Core Bugs # 127121	The Start Date field on the Client Activity Tracker and My Client Activities screen does not populate the current date.	Activity tracker
3	Core Bugs # 127202	The Activity Tracker records getting cut off at the bottom.	Activity tracker
4	Core Bugs # 127250	Activity Tracker Flow Sheet Detail Popup: EDIT REASON field does not have validation message.	Activity tracker
5	Core Bugs # 127236	Attendance: The data is not displayed in the Check In/Out screen, after refreshing the screen the data is displayed.	Attendance
6	Core Bugs # 127179	Authorization details screen: Frequency value was not correctly calculated for the leap year.	Authorization
7	Core Bugs # 127038	Issues in the Authorizations Details page.	Authorization
8	Core Bugs # 127123	'Client Authorization' list page headers not lining up with the data	Authorization
9	Core Bugs # 127199	Batch Service Entry Screen - Mode of Delivery (Not Populating Correctly) In Service Line	Batch Service Entry
10	Core Bugs # 127138	Client Programs: the system is displaying 2 entries one for Requested and another for Enrolled status	Bedboard

12	Core Bugs # 127059	Claim Provider Overrides PaymentState field being set to PaymentCity for some selections.	Charges/Claims
13	Core Bugs # 127060	Performance issue in the Charges/Claims page.	Charges/Claims
14	Core Bugs # 126903	Claims: Unable to create claim files for over 15k records due to performance issue	Charges/Claims
15	Core Bugs # 127264	Claims: The user is unable to read the Disabled (Greyed Out) Fields.	Claims
16	Core Bugs # 126780	ClientFees table is changed, updating the core objects accordingly.	Client Fees Calculation and Adjustments
17	Core Bugs # 127180	UI alignment issue when client has more flags.	Client Flags
18	Core Bugs # 127079	Assigned users in client flag transferring to another client flag when assigned.	Client Flags
19	Core Bugs # 127197	"Client Authorization Changed" flag not triggering for existing client authorizations on modifying 'From/To Dates', 'Frequency' or 'Total Units'	Client Flags
20	Core Bugs # 127046	Client Flags: The 'Pregnancy Indicator' flag is not displaying in the 'Client Flags' section even after signing the 'Diagnosis Document' with the diagnosis code 'Z32.01'.	Client Flags
21	Core Bugs # 127135	For a client, existing contact's relationship was getting updated in 'Client information(C)' screen	Client Information(C)
22	Core Bugs # 126965	'Client Information C' screen: Red error is displayed when Contacts are inserted and saved	Client Information(C)
23	Core Bugs # 127189	Getting validation message while clicking on 'Timeliness' tab in the Client Information screen.	Client Information(C)
24	Core Bugs # 127134	Census Summary and Client Inpatient Visits: displaying all the beds which are not associated with the Staffs	Client Inpatient Visits
25	Core Bugs # 127082	Client Orders: Diagnosis Not Searching Correctly When Adding Additional	Client Orders
26	Core Bugs # 126807	Duplicate listing/records for single client with same client ID	Client Search
27	Core Bugs # 127058	Home Page: Mouse Hovering on the 'Provider icon', all Provider IDs are not displayed.	Clients
39	Core Bugs # 127101	count mismatch in the 'CM Authorizations' and 'Combined Authorizations ' list pages.	CM Events
41	Core Bugs # 126894	Coverage: The start date field clears the data when trying to add Client Plan.	Coverage Plans
42	Core Bugs # 127040	Updating the CQM Measure Value Sets for Concept code - CMS 2 (99401,99402,99403,99404) and CMS 159.	CQM
43	Core Bugs # 127191	CQM medication query is causing reports to take a long time to run.	CQM
44	Core Bugs # 126878	Data Warehouse history and the amount of time to load DW jobs have been getting longer.	Data Warehouse Job
47	Core Bugs # 127015	Unable to delete cosigner form the list from the signed Documents	Documents
48	Core Bugs # 127034	DSM 5: The selected data from the grid for the document is getting cleared when user tried to click on any fields.	Documents

49	Core Bugs # 126572	The 'Care Plan' & 'Care Plan Review' Page is not aligned properly.	Documents
50	Core Bugs # 127086	Assessment: The 'LOCUS Result Description' field is displayed as blank when the 'LOCUS Result' score is 255 in the Summary tab.	Documents
51	Core Bugs # 127216	Goals or Objectives are not displayed in the Care Plan PDF.	Documents
52	Core Bugs # 126899	Diagnosis Document: Error is displayed while signing the diagnosis document.	Documents
53	Core Bugs # 127194	Registration document: incorrect logo is displaying	Documents
54	Core Bugs # 127130	Documents List page width issue.	Documents
55	Core Bugs # 126898	DFA Document: Client Signature Header Signing as Clinician	Dynamic Forms
56	Core Bugs # 127129	DFA Documents or Service/Notes: 'Report displaying "undefined" Data' and 'Calendar icons in the DFA Forms are not loading correctly'.	Dynamic Forms
57	Core Bugs # 127243	The inserted validation for the required field in DFA service note is not displayed in 'Document Validations'.	Dynamic Forms
58	Core Bugs # 126365	Eligibility Update Procedure Does Not Update Records correctly	Eligibility – Mapping
59	Core Bugs # 127144	Group MAR: The user is able to input characters into the 'Dose' field instead of decimals.	Group MAR
60	Core Bugs # 127200	Group Service Detail screen – The Client names are not lined up properly in the Client Note tab.	Group Service
61	Core Bugs # 127007	Unable To Move Group Documents To A New Service.	Group Service
62	Core Bugs # 127097	Group Services – Duplicate services being created in recurring groups.	Group Service
63	Core Bugs # 127287	Group is not displayed in the Groups list page when there is an inactive client in the Group.	Groups
64	Core Bugs # 127107	sending an immunization history details in the form of HL7 message for an individual client to the default configured vendor and location.	Immunization
65	Core Bugs # 127119	The Health Data Report is using Summary of Care Version format to generate CCD XML instead of USCDI Summary of Care version.	Interface
66	Core Bugs # 127072	Health Data Report Detail Screen - error on Save	Interface
67	Core Bugs # 127186	Issues in Ledger Entries screen	Ledger Entry
69	Core Bugs # 126984	Getting an Error message while clicking on the Client Viewing icon.	Manage Staff Permissions
75	Core Bugs # 127052	Patient Portal User role permissions are getting overwritten.	Non-Staff User
76	Core Bugs # 127143	Patient Portal: My Dashboard Layout not aligned and sorted properly.	Non-Staff User
77	Core Bugs # 127137	Order Details: 'Sensitive Order' not displaying.	Orders
78	Core Bugs # 126993	Export button not working in the Orders list page for filtered data.	Orders

79	Core Bugs # 126884	Client Payment Auto Post will Post payment to the Oldest Open Accounting Period.	Payments/Adjustments
81	Core Bugs # 127070	Plans: The copied 'Billing Codes' from the primary plan to the secondary plan appeared blank under the "Billing Codes" tab.	Plans
~~82~~	~~Core Bugs # 127009~~	~~Primary Care note skipping E&M billing pop-up~~	~~Primary Care~~
~~83~~	~~Core Bugs # 127080~~	~~My Calendar Page: Inactive staff is reflected in the 'Provider Dropdown' under the 'New Primary Care Entry' popup.~~	~~Primary Care~~
86	Core Bugs # 127094	Programs: An Error message is displaying when trying to discharge a program.	Programs
87	Core Bugs # 127151	Unable to modify the existing contracted rates when more than one exists with same billing code/modifier	Provider Contract
88	Core Bugs # 127063	Getting error when entering more than 100 characters in 'Liability Information' Text Box.	Provider Contract
89	Core Bugs # 127246	Client Abbreviated Notes Report' not displaying client data when made as QuickLinks.	QuickLinks
90	Core Bugs # 127233	Client Search Quicklinks display issue.	QuickLinks
91	Core Bugs # 127002	Alignment Issue in the Client Information box in the Reception screen	Reception
92	Core Bugs # 127142	Performance issue in the Reception screen	Reception
93	Core Bugs # 127149	'Reception': The screen automatically scrolls to the bottom after an Auto-Refresh.	Reception
96	Core Bugs # 126968	Rx Application - Prescribers having issues with weekly/monthly medication directions	Rx Application
97	Core Bugs # 127113	Rx: validation is displaying when trying to reorder medication	Rx Application
98	Core Bugs # 127154	Rx not showing Outbound Prescriptions even when prescriber proxy	Rx Application
99	Core Bugs # 127147	SmartKey inputs inconsistent in number of characters they accept for SAML user in the document signature pop up	SAML (Single Sign On)
100	Core Bugs # 127145	Unable to upload EOB in Payment/Adjustments for non admin staff	Scanning
101	Core Bugs # 127104	Staff able to see batch scanned documents for the denied Clients. Staff able to see batch scanned documents for the denied Clients.	Scanning
104	Core Bugs # 126943	Multiple services were getting created when nightly job runs	Services
105	Core Bugs # 127115	Staff can select Programs of Type 'No Episode' even though they don't have it in Staff Details	Services
106	Core Bugs # 127022	IP Psychiatric Note: Unable to check/uncheck the checkboxes by clicking checkbox names.	Services/Notes

107	Core Bugs # 127263	IP Psychiatric Note: Validation not displaying for Emergency Indicator	Services/Notes
108	Core Bugs # 126998	Lab comments were initialized/displayed at the top of the Data Reviewed Section and the latest Lab comments were initialized at the last in the Data Reviewed Section.	Services/Notes
109	Core Bugs # 127171	Psychiatric Note:'SSP_RDLDynamicColorVitalsFromXML' SP optimization.	Services/Notes
110	Core Bugs # 127190	Psychiatric (E&M) Note: The system kept on 'processing' indefinitely whenever the user attempts to add data in the 'Medical Decision Making' tab and clicks on the 'Save' button.	Services/Notes
111	Core Bugs # 127220	Facing Slowness in the Psychiatric Note and not able to save.	Services/Notes
112	Core Bugs # 126708	IP Psychiatric Note: Unable to check/uncheck the checkboxes by clicking checkbox names.	Services/Notes
113	Core Bugs # 127010	Unable to save Service Notes with goals and objectives due to performance issue	Services/Notes
114	Core Bugs # 127258	Execution timeout error' and 'Page Unresponsive' issue occurred while user performing action in 'Inquiry' screen	SmartCare Improvements
115	Core Bugs # 127326	Month-End AR Rollover Report is working slowly.	SmartCare Improvements
116	Core Bugs # 126954	The Display As name under a Staff Details does not refresh to the correct name	Staff/Users
117	Core Bugs # 127096	Table Editor: Getting Red error when user tried to modify the data in the 'ActionDefaultFilters' column of 'ScreenActions' table.	Table Editor
118	Core Bugs # 127001	Completed order still showing on whiteboard	Whiteboard
119	Core Bugs # 127152	Getting an error while loading the Supervisee Primary Caseload widget	Widgets
120	Core Bugs # 127061	Referral Coordinator Widget: Consult orders are duplicating	Widgets

Functionality-wise Task Details:

Activity Timeline

Reference No	Task No	Description
1	Core Bugs # 127048	Activity Timeline list page displays Special Characters and is not exporting data.

Author: Yashas Kyadalappa

1. Core Bugs # 127048: Activity Timeline list page displays Special Characters and is not exporting data.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: 'Client' -- 'Timelines/Flags/Events' -- 'Activity Timeline' -- 'Activity Timeline' list page -- Click on the 'Coverage Plan Activity' check box and Apply Filter button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Activity Timeline list page, the description on the list page related to the Coverage Plan was displayed with special characters "â€"" in between each field, and no files were exported when clicked on the export button.

With this release, the above-mentioned issue has been resolved. Now, no special characters are displayed in the description for the Coverage Plans under Activity Timeline list page and the files are exported when clicked on the 'Export' button.

Activity tracker

Reference No	Task No	Description
2	Core Bugs # 127121	The Start Date field on the Client Activity Tracker and My Client Activities screen does not populate the current date.
3	Core Bugs # 127202	The Activity Tracker records getting cut off at the bottom.
4	Core Bugs # 127250	Activity Tracker Flow Sheet Detail Popup: EDIT REASON field does not have validation message.

Author: Abhishek Naik

2.Core Bugs # 127121: The Start Date field on the Client Activity Tracker and My Client Activities screen does not populate the current date.

Release Type: Fix | **Priority:** Medium

Navigation Path 1: Select 'Client' - Search 'Client Activity Tracker' - Start date.

Navigation Path 2: Search 'My Client Activities' - Start date.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The start date field was not getting updated to the current date on logout and login back, in the My Client Activities and Client Activity Tracker screens.

With this release, the above issue has been resolved. Now, the start date field is updated to the current date on logout and login back, in the My Client Activities and Client Activity Tracker screens.

Author: Abhishek Naik

3.Core Bugs # 127202: The Activity Tracker records getting cut off at the bottom.

Release Type: Fix **|** **Priority:** Medium

Navigation Path 1: 'Client' -- 'Client Activity Tracker'.

Navigation Path 2: 'My Office' -- 'My Client Activities'.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. The last record in the 'Client Activity Tracker' and 'My Client Activities' list page was cropped when the browser bookmarks were enabled. Due to this, the users were unable to see the last activity tracker order.

With this release, the above-mentioned issue has been resolved. Now, the last record in the 'Client Activity Tracker' and 'My Client Activities' list pages are properly displayed when the browser bookmarks are enabled and the user is able to see the last activity tracker order.

Author: Abhishek Naik

4.Core Bugs # 127250: Activity Tracker Flow Sheet Detail Popup: EDIT REASON field does not have validation message.

Release Type: Fix **| Priority:** Medium

Navigation Path 1: 'Client' -- 'Client Activity Tracker' screen -- Open 'Completed' activity -- Click 'Edit' button.

Navigation Path 2: 'My Office' -- 'My Client Activities' -- Open 'Completed' activity -- Click 'Edit' button.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. When a user tried to save the flowsheet pop-up without adding the Edit reason for the completed activities, the corresponding validation message 'Edit Reason is Required' was missing.

With this release, above mentioned issue has been resolved and now, the validation 'Edit Reason is Required' will display when a user tries to save the flowsheet pop-up without adding the Edit reason for the completed activities.

Attendance

Reference No	Task No	Description
5	Core Bugs # 127236	Attendance: The data is not displayed in the Check In/Out screen, after refreshing the screen the data is displayed.

Author: Suganya Sivakumar

5.Core Bugs # 127236: Attendance: The data is not displayed in the Check In/Out screen, after refreshing the screen the data is displayed.

Release Type: Fix **|** **Priority:** Medium

Prerequisites:

- The scheduled Group services are required.
- In the Group Detail page, the attendance for the appropriate group is scheduled.

Navigation Path: My Office -- Attendance -- Attendance List Page -- Select the Date -- Click on Apply Filter -- Under Checked In column -- Click on the 'O' symbol (Check In/Out) -- Check In /Out screen -- Enter the required fields -- Click on the Save button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Attendance' list page, when the user clicked on 'O' symbol (Check In/Out) under 'Checked In' column, the data was not displayed in the 'Check In/Out' screen. The data was displayed after refreshing the 'Check In/Out' page.

With this release, the above-mentioned issue has been resolved. Now, the data is displayed in the 'Check In/Out' screen without refreshing the page when the user clicks on 'O' (Check In/Out) symbol under the 'Checked In' column in the 'Attendance' list page.

Authorization

Reference No	Task No	Description
6	Core Bugs # 127179	Authorization details screen: Frequency value was not correctly calculated for the leap year.
7	Core Bugs # 127038	Issues in the Authorizations Details page.
8	Core Bugs # 127123	'Client Authorization' list page headers not lining up with the data.

Author: Lakshmi Kumarappan

6.Core Bugs # 127179: Authorization details screen: Frequency value was not correctly calculated for the leap year.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: Perform Client search -- Select Client -- Navigate to 'Authorization' Screen -- Click on 'New' icon -- 'Authorization Details' screen -- 'General' -- 'Authorization Requests' session.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In Authorization Details screen, when the user selected the frequency of 'once a year', the frequency value for the leap year was not calculated correctly.

With this release, the above-mentioned issue has been resolved. Now the frequency value is correctly calculated in the Authorization Details screen when the user selects the frequency of 'once a year.

Author: Lakshmi Kumarappan

7.Core Bugs # 127038: Issues in the Authorizations Details page.

Release Type: Fix | **Priority:** Medium

Navigation Path: Client-Authorizations -Authorizations List page-Click on Id (Hyperlink)- Authorizations Detail page-Select the radio button for any Auth code from the Authorization grid- Click on Modify.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Authorizations detail page, when the user tried to modify the auth Codes from the Authorization grid, the selection of the radio button was not moved to the next auth code selection and the user was unable to scroll down on the list to get back the authorizations in the grid.

With this release, the above-mentioned issue is resolved. Now, in the Authorization detail page, when the user modifies the auth code from the authorization grid, the selection of the radio button is moved to the next auth code selection and the scroll bar is displayed to select the list of authorizations in the grid.

Author: Rakesh Naganagoda

8.Core Bugs # 127123: 'Client Authorization' list page headers not lining up with the data.

Release Type: Fix | **Priority:** High

Navigation Path: Login to SmartCare application **-** Client – Navigate to 'Client Authorizations' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The data in the 'Client Authorizations' list page was not lined up with the headers.

With this release, the above-mentioned issues have been resolved. Now, the data in the 'Client Authorizations' list page is lined up with the headers.

Batch Service Entry

Reference No	Task No	Description
9	Core Bugs # 127199	Batch Service Entry Screen - Mode of Delivery (Not Populating Correctly) In Service Line.

Author: Kiran Yogendra

9.Core Bugs # 127199: Batch Service Entry Screen - Mode of Delivery (Not Populating Correctly) In Service Line.

Release Type: Fix | **Priority:** Medium

Prerequisite: The Default Values are selected/entered before checking the 'Apply Default Values To Below Grid' checkbox.

Navigation Path: Go Search **–** Batch Service Entry – Select a Program – Apply filter – Select Procedure and other details for Default Values – Check the 'Apply Default Values to Below Grid' checkbox – Click on the '+' icon for any of the Clients displayed in the grid.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to add one more service line on the 'Batch Service Entry' screen by clicking the '+' icon for a particular client on the grid, the Default Value set for the 'Mode Of Delivery' dropdown was not selected by default. Instead, the label name 'Mode Of Delivery' was displayed.

With this release, the issue mentioned above has been resolved. Now, when the user selects the new service line for a particular client, the default value set for the 'Mode of Delivery' dropdown is selected on the grid.

Bedboard

Reference No	Task No	Description
10	Core Bugs # 127138	Client Programs: the system is displaying 2 entries one for Requested and another for Enrolled status.

Author: Aishwarya Bommaklar

10.Core Bugs # 127138: Client Programs: the system is displaying 2 entries one for Requested and another for Enrolled status.

Release Type: Fix **|** **Priority:** High

Prerequisite: Set the Configuration key 'SETAUTOPROGRAMASSIGNMENTDISCHARGE' as 'N'.

Navigation Path 1: Client -- 'Program' -- Click on New Icon -- Select a program -- In the Current Status dropdown -- Select a Requested Status -- Click on Save Icon.

Navigation Path 2: My Office – 'Bedboard' - Search for Open bed - Click on down arrow beside Open bed status (Select the Bed assigned with the above Requested program) -- Select Admit option -- Navigate to Census Management – Admit detail screen -- Enter all the required fields -- Click on Save and Close Icon.

Navigation Path 3: Client -- 'Program'.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When the Client requested for a Program and got auto Enrolled to the same program through Bedboard Admission, the system was displaying 2 entries one for Requested and another for Enrolled status, instead of updating the Requested status to Enrolled status. This was happening when the configuration key 'SETAUTOPROGRAMASSIGNMENTDISCHARGE' as 'N'

With this release, the above-mentioned issue has been resolved. Now, the system is updating the Requested status to Enrolled status, when the Client requested for a Program and got auto Enrolled to the same program through Bedboard Admission.

Charge Details

Reference No	Task No	Description
11	EII # 125735	Implemented a Crossover Claims logic for Do Not Bill during transfer to Secondary coverage plan in the charge details.

Author: Yashas Kydalappa

11.EII # 125735: Implemented a Crossover Claims logic for Do Not Bill during transfer to Secondary coverage plan in the charge details.

Release Type: Change | **Priority:** On Fire

Prerequisite:

1. Client is associated with two Coverage Plans. i.e., Primary plan with COB Priority = 1 and Secondary plan with COB Priority =2.
2. The Primary Coverage Plan has been mapped to "CROSSOVERCLAIMSOURCE" recode.
3. The 'Mark crossover charges to this plan as do not bill' checkbox is checked in the Plan Detail screen for the secondary coverage plan.
4. The Service is created and completed.
5. The Primary charge is billed in 'Charges/claims screen'.

Navigation Path: Go search -Select Services (Client)- 'Services' list page -click on 'DOS' hyper link -'Service Detail' screen - click on the 'Charge' hyperlink - 'Ledger Entries screen –Click on the charge ID hyperlink – 'Charge Details' screen -Verify the 'Do Not Bill' check box under the Status section of general tab.

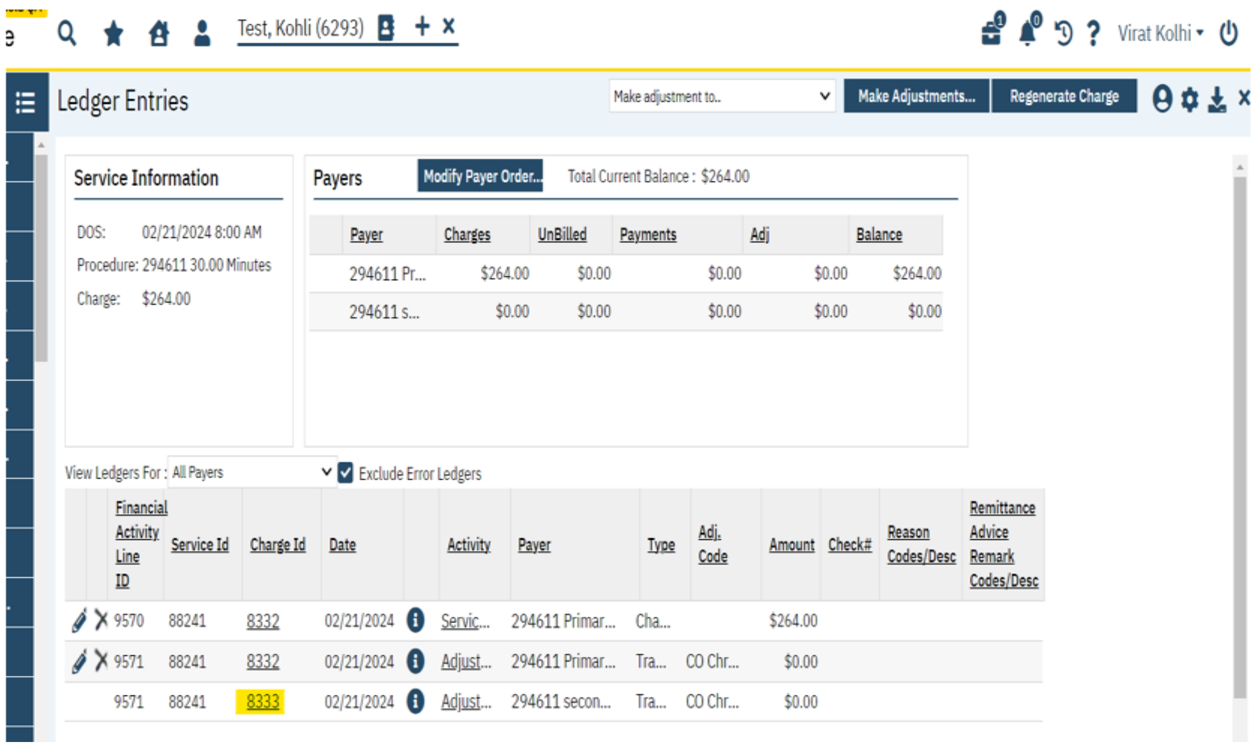
Functionality 'Before' and 'After' release:

Purpose: The customers want to ensure that even if they get the primary claim payment before the secondary, that when money is transferred to the secondary charge, that it will not accidentally billed. They want to set to a "Do Not Bill" status pending receipt of the secondary payment from the crossover claim**.**

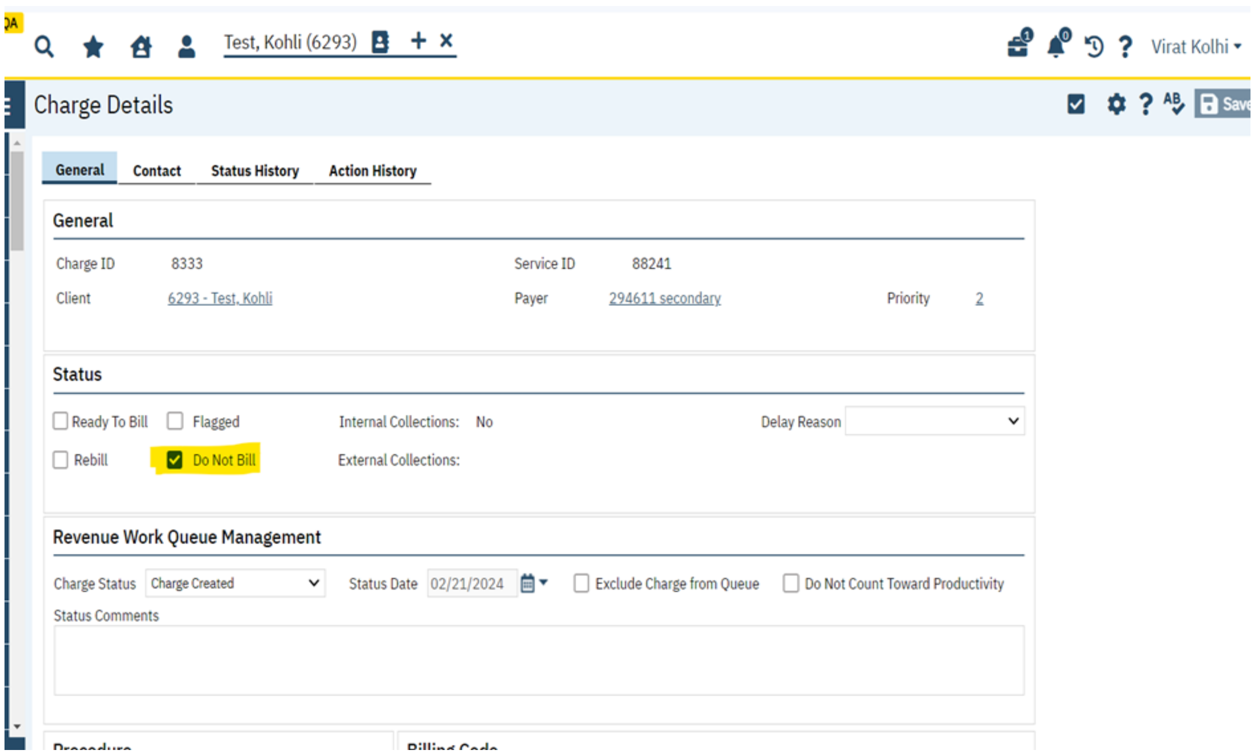
With the release, a new logic has been implemented for the Charges which will be generated when the cross over job runs (EXEC ssp_ERCreateChargesForCrossOver).

When the 'Mark crossover charges to this plan as do not bill' checkbox is checked for the secondary coverage plan, then the status of the secondary charges are automatically set to 'Do Not Bill'.

Job: EXEC ssp_ERCreateChargesForCrossOver @TransferAdjustmentCode = 2761(CO Chrg exceeds fee schedule (45)).



Here, the ChargeID 8333 is the secondary charge and the 'Do Not Bill' checkbox has been checked successfully in the Charge Details screen.



Charges/Claims

Reference No	Task No	Description
12	Core Bugs # 127059	Claim Provider Overrides PaymentState field being set to PaymentCity for some selections.
13	Core Bugs # 127060	Performance issue in the Charges/Claims page.
14	Core Bugs # 126903	Claims: Unable to create claim files for over 15k records due to performance issue

Author: Sahana Gururaja

12.Core Bugs # 127059: Claim Provider Overrides PaymentState field being set to PaymentCity for some selections.

Release Type: Fix | **Priority:** High

Prerequisites:

Select any of the option 'LocationNPIonly', 'ProgramNPIonly', or 'ServiceProgramNameAndNPI' for the 'Billing Provider' field in the 'Provider Override' section on the 'Claims Provider Overrider Details', through the **Path:**

'Administration' – 'Claims Provider Overrides' – click on the 'New' icon 'Claim Provider Override Details' screen --- add all the required information in the 'Provider Override Selection Criteria' and select the 'With Claim Format' as required and add the any of the option 'LocationNPIonly', 'ProgramNPIonly', or 'ServiceProgramNameAndNPI' in the 'Billing Provider' field – then Save.

Navigation Path: 'My Office' --'Charges/Claims' – select the required ChargeID – click on the 'E-Claims' button -- 'Process Now' button -- 'Create Claim File' button -- 'Save As' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user created a set-up with claim provider override and selected the option 'ServiceProgramNameAndNPI' for the 'Billing Provider' field, the 'State' from the 'Agency Table State,' was replaced with the first two letters of 'Agency City' on the claim file in the 'N3' segment on 'Billing Provider' loop.

With this release, the above-mentioned issue has been fixed. Now, if a user sets up a charge with the claim provider override and chooses 'LocationNPIonly' or 'ProgramNPIonly', or 'ServiceProgramNameAndNPI' for the 'Billing Provider' field, the 'State' on the claim file will remain 'Agency Table State' in the 'N3' segment on 'Billing Provider' loop and it will not be replaced with the first two letters of the 'Agency City'.

Author: Roopa Hemanna

13.Core Bugs # 127060: Performance issue in the Charges/Claims page.

Release Type: Fix | **Priority:** Medium

Navigation Path: My Office – Charges/Claims – select the required charge Id and click on 'E Claim' button (837 Professional) – click on the 'Process Now' button in the 'Claim Processing' pop-up – click on 'Create Claim File' button – click on 'Save As' button in the 'Claim File Creation' pop-up screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The timeout issue occurred during processing a large number of claim batches in the Charges/Claims list page.

With this release, the above-mentioned issue has been resolved. Now, the code is optimized and the changes have been made to the performance tuning in all related areas. The Charges/Claims list page is loaded without any timeout exceptions or errors, or system freeze issues when closing and navigating back to the Charges/Claims list screen with the large number of records for the 1-year date range or short-term date range. Also, upon closing the claim processing pop-up, logging out, and then logging back in, the timeout/ performance issue is not observed.

Author: Roopa Hemanna

14.Core Bugs # 126903: Claims: Unable to create claim files for over 15k records due to performance issue.

Release Type: Fix **| Priority:** High

Navigation Path: 'My office'– 'Charges/Claims' List page -- 'Charges/Claims' list page – select large number of files – click on 'Eclaim' button -- select the batch record -- click on 'Process now' button -- Click on 'Create Claim File' button – Claim File Creation pop up – Click on "Save As" button – Click on "Close" button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The SmartCare application was freezing when a user attempted to create the 837 files in Charges/Claims for services over 15K, 21K, 80K and so on. When this occurred, the users would receive warning messages and were logged out of SmartCare. To regain access, the users had to clear the browser cache and return to the login screen.

With this release, the above-mentioned issue has been resolved. Now, the code is optimized to improve the performance, and we are able to process a large number of claim batches (with 21k, 80k, and so on) without facing any timeout or system freeze issues, when closing the claim processing pop-up, logging out, and logging back in.

Claims

Reference No	Task No	Description
15	Core Bugs # 127264	Claims: The user is unable to read the Disabled (Greyed Out) Fields.

Author: Kiran Tigarimath

15.Core Bugs # 127264: Claims: The user is unable to read the Disabled (Greyed Out) Fields.

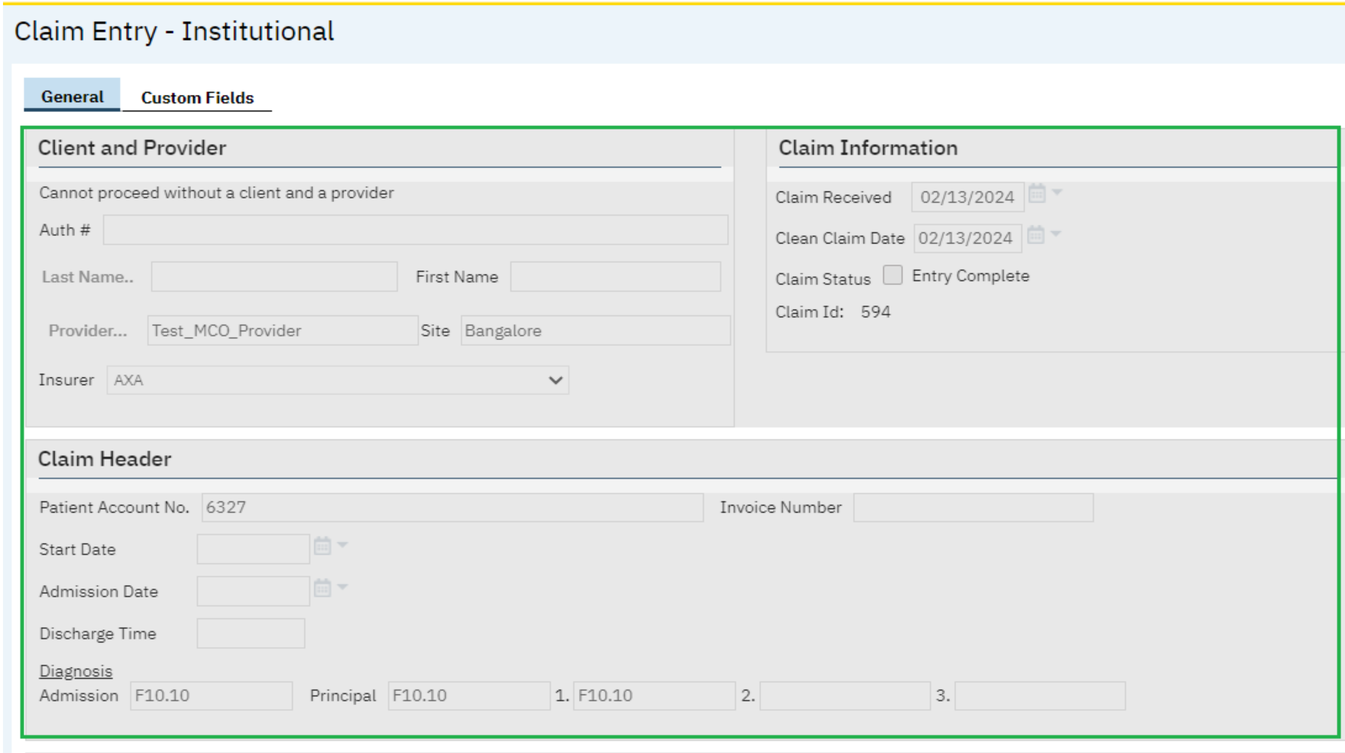
Release Type: Fix **| Priority:** High

Navigation Path: 'My Office' -- 'Claims' -- 'Select any claims with the status Denied or Paid' -- 'View claim Form' Icon -- 'Claim Entry' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was unable to read the disabled fields data in 'Claim Entry' screen.

With this release, the above-mentioned issue has been resolved. Now, the user can read the disabled fields data in the 'Claim Entry' screen without any issue.



Client Fees Calculation and Adjustments

Reference No	Task No	Description
16	Core Bugs # 126780	ClientFees table is changed, updating the core objects accordingly.

Author: Roopa Hemanna

16.Core Bugs: 126780: ClientFees table is changed, updating the core objects accordingly.

Release Type: Fix | **Priority:** Medium

Navigation Path: NA

Functionality 'Before' and 'After' release:

Note: This will work for the customer environments who are using custom logic.

Before this release, here was the behavior. When the user tried to run the function 'ssf_PMCalculateClientFeeAmount' and the stored procedure 'ssp_PostClientFeeAdjustments', the required changes made in their Client Fee process- "Client Fees Calculation and Adjustments" were not displayed.

With this release, the above-mentioned issue has been resolved. Now, the function 'ssf_PMCalculateClientFeeAmount' and the stored procedure 'ssp_PostClientFeeAdjustments' have been updated to accommodate the changes in the Client Fees Table.

Client Flags

Reference No	Task No	Description
17	Core Bugs # 127180	UI alignment issue when client has more flags.
18	Core Bugs # 127079	Assigned users in client flag transferring to another client flag when assigned.
19	Core Bugs # 127197	"Client Authorization Changed" flag not triggering for existing client authorizations on modifying 'From/To Dates', 'Frequency' or 'Total Units'
20	Core Bugs # 127046	Client Flags: The 'Pregnancy Indicator' flag is not displaying in the 'Client Flags' section even after signing the 'Diagnosis Document' with the diagnosis code 'Z32.01'.

Author: Rakesh Naganagoda

17.Core Bugs # 127180: UI alignment issue when client has more flags.

Release Type: Fix | **Priority:** Medium

Navigation Path: Login to SmartCare application **-** Client – Select any client who has more client flags.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The mini-icons associated with the client flag icons displayed with the client name in the header, were not aligned properly.

With this release, the above-mentioned issue has been resolved. Now, the mini-icons associated with the client flag icons displayed with the client name in the header, are aligned properly.

Author: Girish Jayanna

18.Core Bugs # 127079: Assigned users in client flag transferring to another client flag when assigned.

Release Type: Fix **|** **Priority:** High

Prerequisite: The flag is created for a client.

Navigation Path: Client search -- 'Client flags (Client)' -- 'Client flag details'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In Client Flag Details screen, when a staff attempted to assign users or roles to multiple flags in "Assigned User" and "Assigned Roles" in a single attempt, the assigned data was moved to previously selected flags. This issue occurred when staff modified the multiple flags without clicking the SAVE button for each.

With this release, the above issue has been resolved. The staff can now modify multiple flags in a single attempt and on click of SAVE button, the data is correctly saved.

Author: Girish Jayanna

19.Core Bugs # 127197: "Client Authorization Changed" flag not triggering for existing client authorizations on modifying 'From/To Dates', 'Frequency' or 'Total Units'.

Release Type: Fix | **Priority:** Medium

Prerequisite: A Client Authorization exists with 'Approved' or 'Partially Approved' status.

Navigation Path: Client Search -- 'Client' -- 'Timelines/Flags/Events' -- 'Client flags'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The "Client Authorization Changed" flag was triggered only for new client authorizations with the status 'Approved' or 'Partially Approved', on modifying any of the 'From/To Dates', 'Frequency' or 'Total Units.

With this release, the above-mentioned issue has been resolved. Now, the flag will be triggered when a preexisting (previously saved) Client Authorization (with the 'Approved' or 'Partially Approved' Status) is modified with any of the 'From/To Dates', 'Frequency' or 'Total Units.

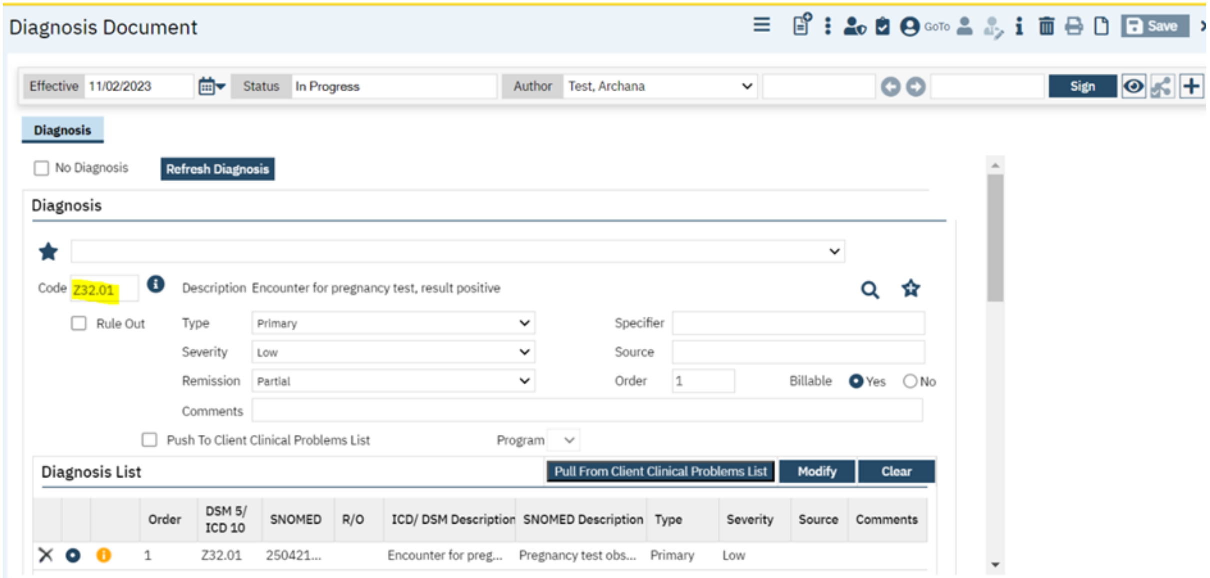
Author: Girish Jayanna

20.Core Bugs # 127046: Client Flags: The 'Pregnancy Indicator' flag is not displaying in the 'Client Flags' section even after signing the 'Diagnosis Document' with the diagnosis code 'Z32.01'.

Release Type: Fix **|** **Priority:** Medium

Prerequisite:

- The signed 'Diagnosis document' is present with the diagnosis code Z32.01.



Navigation Path 1: 'Client Information' -- 'Demographics' -- 'Pregnant field' – click on 'Yes' radio button – then 'Save'.

Navigation Path 2: 'Client' search -- 'Client Flags (Client)'

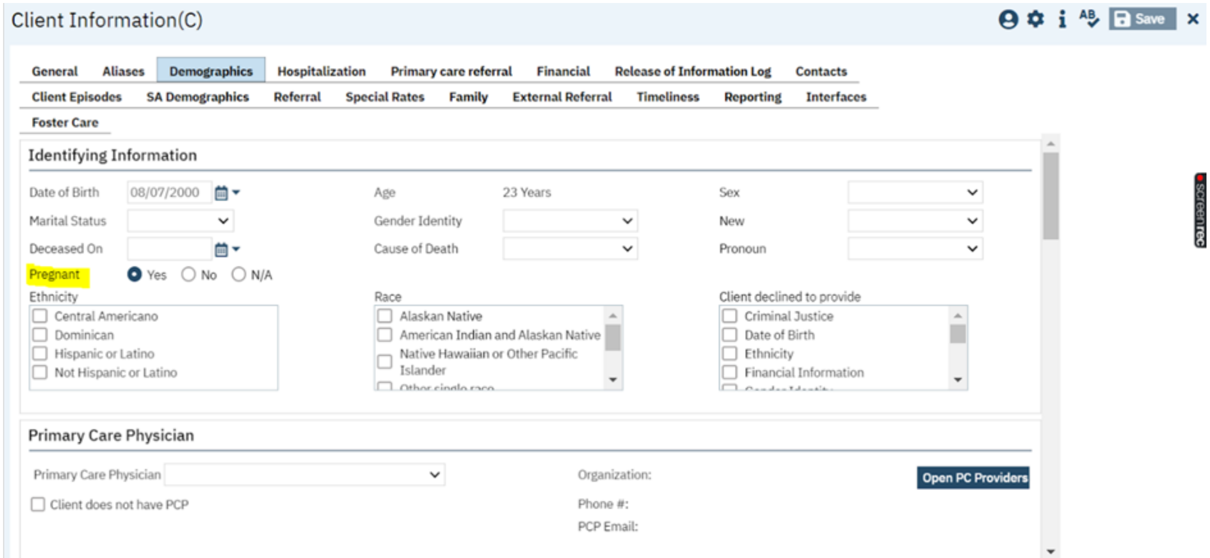
Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Pregnancy Indicator' flag was not being displayed even after signing the 'Diagnosis Document' with the diagnosis code 'Z32.01'.

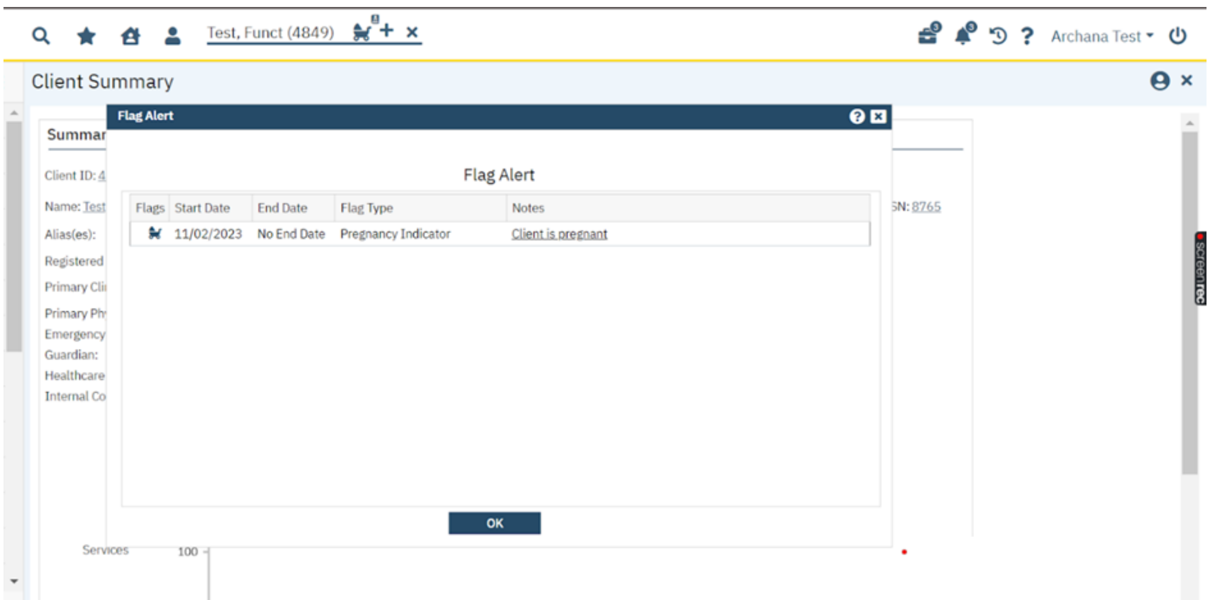
With this release, the above issue has been resolved. Now, the 'Pregnancy Indicator' flag will trigger as expected after signing the 'Diagnosis Document' with the 'Z32.01' diagnosis code.

Below are the details for the Pregnancy indicator flag:

1. Having a Diagnosis code (Z32.01) in Recode **'PregnancyDiagnosisCodesForPregnancyIndicator',** that is saved in the 'Client Problems' screen or in the 'Diagnosis Document' which is signed, will update the 'Pregnant' field as "Yes" in 'Client Information' screen and the flag will be triggered.



2. Only one 'Pregnancy Indicator' flag is allowed per client at any given point in time.
3. Additionally, when the 'Pregnancy Indicator' flag type is set for a client, the associated flag content is displayed as 'Client is pregnant' in the 'flag alert 'popup and also in the 'Client Flags' section.



4. Where, if the 'Pregnancy Indicator' flag ends on a specific day, the associated 'Pregnant' field in the 'Client Information' screen is automatically updated to either 'No' or 'N/A'. Alternatively, staff members have the option to manually end the flag, which triggers the update in the 'Pregnant' field.

Client Information(C)

Reference No	Task No	Description
21	Core Bugs # 127135	For a client, existing contact's relationship was getting updated in 'Client information(C)' screen.
22	Core Bugs # 126965	'Client Information C' screen: Red error is displayed when Contacts are inserted and saved.
23	Core Bugs # 127189	Getting validation message while clicking on 'Timeliness' tab in the Client Information screen.

Author: Savitha Siddaraju

21.Core Bugs # 127135: For a client, existing contact's relationship was getting updated in 'Client information(C)' screen.

Release Type: Fix | **Priority:** Medium

Prerequisite: The client's contacts have been added in the contacts tab of 'Client Information(C)' screen.

Navigation Path 1: 'Client' - Client Information(C) - Contacts - Add/Insert the contacts - List of contacts - Save.

Navigation Path 2: 'My office' - 'Inquiries' - Inquiries list page - click on 'New' icon - 'Inquiry Details' - 'Initial' - 'Inquirer Information' - Fill all required details - Save.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. For a new client, the existing contact's relationship was getting updated in 'Client information' screen. This occurred whenever the user attempted to create a new record by adding existing contact's name ('First' and 'Last' name) with different relation in 'Inquirer Information' section of 'Inquiry Details' screen.

With this release, the above-mentioned issue has been resolved. Now for a client, the existing contact's relationship is not getting updated, and a new record will be created in list of contacts grid in 'Client information' screen.

Author: Ramya Nagaraj

22.Core Bugs # 126965: 'Client Information C' screen: Red error is displayed when Contacts are inserted and saved

Release Type: Fix **|** **Priority:** High

Prerequisite: To navigate between multiple tabs after inserting and Saving contacts in the 'Contacts' Tab by following the below **path**:
Search for client and select the client -- Navigate to 'Client Information C' screen and click on 'General' tab -- Click on 'Contacts' tab, insert and save contacts -- Click on 'External Referrals' or 'Alias' tab.

Navigation Path: 'Client' -- 'Client Information C' screen -- 'Contacts'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. A Red error was displayed when a user inserted and saved contacts in 'Contacts' tab, after navigating to several other tabs like 'External Referrals', 'Alias' in 'Client Information C' screen.

With this release, the above-mentioned issue has been resolved. Now, a user is able to insert and save contacts in 'Contacts' tab after navigating to several other tabs like 'External Referrals', 'Alias' etc., in 'Client Information C' screen without any red errors.

Author: Akshay Vishwanath

23.Core Bugs # 127189: Getting validation message while clicking on 'Timeliness' tab in the Client Information screen.

Release Type: Fix | **Priority:** Medium

Prerequisite: Episode is present for the client.

Navigation Path: 'Client' -- 'Client Information (c)' – click on 'Timeliness' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Client Information screen, when the user clicked on the 'Timeliness' tab, the below mentioned validation message was displayed even though the episode was present.

Validation message: *"Episode must be created prior to filling out the Timeliness Information".*

With this release, the above-mentioned issue has been resolved. Now, the user can open the 'Timeliness' tab without any validation message when there is an episode present.

Client Inpatient Visits

Reference No	Task No	Description
24	Core Bugs # 127134	Census Summary and Client Inpatient Visits: displaying all the beds which are not associated with the Staffs.

Author: Aishwarya Bommalkar

24.Core Bugs: 127134: Census Summary and Client Inpatient Visits: displaying all the beds which are not associated with the Staffs.

Release Type: Fix | **Priority:** High

Prerequisite:

1. The configuration key FilterDataBasedOnStaffAssociatedToProgramsAndUnits is set as 'Yes'.

2. Map the Program and Units to staff in the Staff Details screen.

Navigation Path 1: My Office – Census Summary screen.

Navigation Path 2: Client – Client Inpatient Visits screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the configuration key FilterDataBasedOnStaffAssociatedToProgramsAndUnits was set as 'Yes', the user was still able to see all the beds which were not associated with the Staffs, in the Census Summary and Client Inpatient Visits screen.

With this release, the above-mentioned issue has been resolved. Now, when the configuration key FilterDataBasedOnStaffAssociatedToProgramsAndUnits is set as 'Yes', the user is able to view only the Units and Programs associated with the staff in the Census Summary and Client Inpatient Visits screen.

Client Orders

Reference No	Task No	Description
25	Core Bugs # 127082	Client Orders: Diagnosis Not Searching Correctly When Adding Additional.

Author: Sithara Ponnath

25.Core Bugs # 127082: Client Orders: Diagnosis Not Searching Correctly When Adding Additional.

Release Type: Fix | **Priority:** Medium

Navigation Path: 'Client' --- 'Client Orders' screen -- Click on 'New' icon to create a client order --- Add a 'Lab' or any Order where a diagnosis is required -- Enter required data -- Type the 'Diagnosis Code' in the diagnosis search text box.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user tried to add a diagnosis where it was a single diagnosis, the diagnosis description was auto populated in the text box and the 'Diagnosis' pop-up was also displayed.

With this release, the above-mentioned issue has been resolved. Now, the single diagnosis will auto populate but the diagnosis pop-up will not display on Dx code search.

Client Search

Reference No	Task No	Description
26	Core Bugs # 126807	Duplicate listing/records for single client with same client ID

Author: Savitha Siddaraju

26.Core Bugs # 126807: Duplicate listing/records for single client with same client ID.

Release Type: Fix | **Priority:** Medium

Navigation Path: Client Search – Client Search pop up – Search for Client by entering Client ID

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Client Search pop up, when the user tried to search client by entering Client ID, two results appeared in the Client Search window.

With this release, the above-mentioned issue has been resolved. Now, In the Client Search pop up, when the user tries to search client by entering Client ID, only one client is displayed in the client search window.

Clients

Reference No	Task No	Description
27	Core Bugs # 127058	Home Page: Mouse Hovering on the 'Provider icon', all Provider IDs are not displayed.

Author: Savitha Siddaraju

27.Core Bugs # 127058: Home Page: Mouse Hovering on the 'Provider icon', all Provider IDs are not displayed.

Release Type: Fix **|** **Priority:** Urgent

Navigation path: Login to the 'SmartCare' application – 'Home' page – 'Client Name' field – Mouse hover on the 'Provider icon'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Home page, when a user hovered the mouse over the 'Provider' icon, the system did not display all the 'Provider IDs' that were mapped to a single 'Master client ID'.

With this release, the above-mentioned issue has been resolved. All the 'Provider IDs' mapped to a single 'Master client ID' are now correctly displayed when the user mouse hovers over the 'Provider' icon under the 'Home Page'.

Clinical Data Access Groups (CDAG)

*****Note:** 'The below CDAG tasks are Released, but not ready for GA use'** as these are released to allow testing by designated beta customer(s).

Reference No	Task No	Description
28	EII # 125750	Implementation to modify CDAG logic to consider ClientProgramID instead of ProgramID in Client Flags and in Contact Notes.
29	EII # 125748	Treatment Team: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.
30	EII # 125749	Flow Sheet: Implementation to modify the CDAG logic to display Programs based on 'ClientProgramId' instead of 'ProgramId'.
31	EII # 125751	Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId' in Client Order and Quick Order details screen
32	EII # 125753	Scanning: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.
33	EII # 125754	Grievances and Appeals: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.
34	EII # 125819	Documents PDF: Implementation to modify the CDAG logic to display program names based on 'ClientProgramId' instead of 'ProgramId'.
35	EII # 126757	Clinical Data Access Control: Core Documents: Initialization of the data Program to Program based on 'ClientProgramId' instead 'ProgramId'.
36	EII # 125773	Documents: CDAG Framework changes: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.
37	EII # 126196	Disclosure/Requests, Life Event: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.
38	EII # 124828	Implementation to Add a filter & column for program in 'Documents (Client)'

Author: Girish Jayanna

28.EII # 125750: Implementation to modify CDAG logic to consider ClientProgramID instead of ProgramID in Client Flags and in Contact Notes.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisites:

1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path 1: Client Search -- 'Client' -- 'Contact Notes'.

Navigation Path 2: Client Search -- 'Client' -- 'Timelines/Flags/Events' -- 'Client Flags'.

Functionality 'Before' and 'After' release:

Purpose: To have the records consistently mapped to the correct Client Program entry by Modifying the CDAG logic to consider Client Program ID instead of Program ID.

Before this release, here was the behavior. The 'Program' dropdown options in the following screens were determined by the 'ProgramId':

- Client Notes
- Client Contact Notes

With this release,

1. The 'Program' dropdown options in Client Notes and the Client Contact Notes screens, will be determined by the 'ClientProgramId'.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the **'ClientNotes'** table. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' is set to 'Yes'.

b. Records for deleted rows will not undergo the 'ProgramId' to 'ClientProgramId' correction.

c. If the 'Client Flags' 'CreatedDate' is before the Client's Program 'RequestedDate' or 'EnrolledDate' value, then the 'ClientProgramId' for the corresponding flag will not be updated and will remain NULL.

d. If the 'Client Flags' 'CreatedDate' exceeds the client's program 'DischargedDate' value, then the 'ClientProgramId' for the corresponding flag will not be updated and will remain NULL.

3. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the **'ClientContactNotes'** table. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' is set to 'Yes'.

b. Records for deleted rows will not undergo the 'ProgramId' to 'ClientProgramId' correction.

c. If the 'Client Contact Notes' 'CreatedDate' is before the Client's Program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding contact note will not be updated and will remain NULL.

d. If the 'Client Contact Notes' 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding contact note will not be updated and will remain NULL.

Data Model Changes:

The Column 'ClientProgramID' is included in ClientNotes Table.

The Column 'ClientProgramID' is included in ClientContactNotes Table.

Author: Santosh Huggi

29.EII # 125748: Treatment Team: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change | **Priority:** Urgent

Pre-requisites:

1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path: 'Client' – 'Treatment Team' list page – click on 'New' icon – 'Treatment Team Details' screen – 'Treatment Team' tab -- 'Treatment Team Member' section – 'Program' dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Program' dropdown options in the following screen were determined by the 'ProgramId':

- Treatment Team Details.

With this release,

1. The CDAG logic is modified to display the 'Program' dropdown options in Treatment Team Details screen, based on 'ClientProgramId' instead of 'ProgramId'.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'ClientTreatmentTeamMembers' table. However, please note the following:

   a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
   b. Records for deleted 'ClientTreatmentTeamMembers' will not undergo the 'ProgramId' to 'ClientProgramId' correction.
   c. If the Treatment Team record 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding Treatment Team records will not be updated and will remain *NULL*.
   d. If the Treatment Team record 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding Treatment Team records will not be updated and will remain *NULL*.

Note: There is no change in the UI behavior.

Data Model Changes:

The Column 'ClientProgramID' is included in ClientTreatmentTeamMembers table.

Author: Suganya Sivakumar

30.EII # 125749: Flow Sheet: Implementation to modify the CDAG logic to display Programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisite:

1. System Configuration Key 'DisplayCDAGSectionInStaffDetails' value is set to Yes.
2. System Configuration Key 'EnableClinicalDataAccessGrouping' value is set to Yes.

Navigation Path 1: Client -- Programs -- Click on New Icon -- Select a program -- In the Current Status dropdown -- Select a Status -- Click on Save Icon.

Navigation Path 2: Perform Client Search -- Select the above Client -- Navigate to Flow Sheet Quick Link -- Flow Sheet List Page -- In Vital History tab -- Select Template from Add Flow Sheet dropdown filter -- Click on New Icon -- New Entry Flow Sheet Detail page -- Enter all required fields in Meaningful Use/Vitals section -- Click on Save Icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Program' dropdown options in the Flow Sheet screen was determined by the 'ProgramId':

With this release,

1. The CDAG logic for 'Program' dropdown options field in Flow Sheet screen is modified to consider 'ClientProgramId', instead of ProgramId.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'Flow Sheet' screen. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

b. The records for deleted Flow Sheet will not undergo the 'ProgramId' to 'ClientProgramId' correction.

c. If the Flow Sheet record 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding Flow Sheet records will not be updated and will remain *NULL*.

d. If the Flow Sheet record 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding Flow Sheet records will not be updated and will remain *NULL*.
.

Note: There is no change in the UI behavior.

Data Model Changes:
The Column name "ClientProgramId" included in ClientHealthDataAttributes table.

Author: Madhu Basavaraju

31.EII # 125751: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId' in Client Order and Quick Order details screen.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisites:

1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path 1: Orders (Administration) – 'Orders' List Page – New – 'Order details' screen – Select 'Order Type' other than 'Medication' – Select 'Quick Orders' Option as 'Yes' - Enter the required fields – Save.

Navigation Path 2: 'Client' - 'Client Orders' - 'Client Orders' list page - New - 'Client Order details' screen - Select the Order created in Navigation Path 1 - Enter the required fields – Insert - Save and Sign.

Navigation Path 3: 'Client' - 'Quick Orders' - 'Client Order details' screen - Select the Order created in Navigation Path 1 - Enter the required fields – Insert - Save and sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The CDAG logic for 'Program' dropdown options field in Client Order and Quick Order details screens, considered the ProgramID.

With this release, the CDAG logic for 'Program' dropdown options field is modified to consider ClientProgramID, instead of ProgramID in Client Order and Quick Order details screens.

A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'ClientOrderPrograms' table. However, please note the following:

1. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

2. Records for deleted 'Client Orders' will not undergo the 'ProgramId' to 'ClientProgramId' correction.

3. If the 'Client Orders' 'CreatedDate' is before the Client's Program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding documents will not be updated and will remain *NULL*.

4. If the 'Client Orders' 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding documents will not be updated and will remain *NULL*.

Data Model Changes:
The Column ClientProgramId included in ClientOrderPrograms table.

Author: Santosh Huggi

32.EII # 125753: Scanning: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisites:

1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path 1: 'Client' – 'Scanning' list page – click on the 'Start Batch Upload' button – 'Batch Upload' screen – 'Program' dropdown.

Navigation Path 2: 'Client' – 'Scanning' list page – click on the 'Start Batch Scan' button – 'Batch Scan' screen – 'Program' dropdown.

Navigation Path 3: 'Client' – 'Scanning' list page – click on the 'Scan New Images' icon – 'Scanned Medical Record Detail' screen – 'Program' dropdown.

Navigation Path 4: 'Client' – 'Scanning' list page – click on the 'Upload New Images' icon – 'Upload File Detail' screen – 'Program' dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Program' dropdown options in the Scanning screen was determined by the 'ProgramId':

With this release,

1. The CDAG logic is modified to display the 'Program' dropdown options in the Scanning screen based on 'ClientProgramId' instead of 'ProgramId'.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the ' ImageRecords' table. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

b. Records for deleted 'ImageRecords' will not undergo the 'ProgramId' to 'ClientProgramId' correction.

c. If the 'ImageRecords' record 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding 'ImageRecords' records will not be updated and will remain *NULL*.

d. If the 'ImageRecords' record 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding 'ImageRecords' records will not be updated and will remain *NULL*.

Note: There is no change in the UI behavior.

Data Model Change:
The Column 'ClientProgramId' included in ImageRecords table.

Author: Kiran Yogendra

33.EII # 125754: Grievances and Appeals: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **| Priority:** Urgent

Prerequisites:

1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.

2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path 1: Client Search - Select a client – Go Search – Grievances (My Office) – New Grievances drop-down – Select the value – Enter the required value – Save.

Navigation Path 2: Client Search - Select a client – Go Search – Appeals (My Office) – New Appeals drop-down – Select the value – Enter the required value – Save.

Functionality 'Before' and 'After' release:

Before this release, the CDAG logic for the 'Associated Program' drop-down field in the Grievance Details and Appeal Details screens was based on the ProgramID.

With this release, the CDAG logic for the 'Associated Program' drop-down field is modified to display the list value based on the ClientProgramID instead of ProgramID in both Grievance Details and Appeal Details screens.

Note: A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'Appeals' and 'Grievances' tables. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

b. Records for deleted 'Appeals' or 'Grievances' will not undergo the 'ProgramId' to 'ClientProgramId' correction.

c. If the 'Appeals' or 'Grievances' record's 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding 'Appeals' or 'Grievances' records will not be updated and will remain NULL.

d. If the 'Appeals' or 'Grievances' record's 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding 'Appeals' or 'Grievances' records will not be updated and will remain *NULL*.

Data Model Changes:

The Column 'ClientProgramID' is included in Appeals table.

The Column 'ClientProgramID' is included in Grievances tables.

Author: Santosh Huggi

34.EII # 125819: Documents PDF: Implementation to modify the CDAG logic to display program names based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisites:
1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path: 'Client' – 'Documents' – Select any document -- Document Details Screen – Sign the document – PDF - 'Program' field value.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Program' name in the PDF document was printed based on the 'ProgramId'.

With this release, the CDAG logic is modified to print the program name in the PDF document, based on 'ClientProgramId'.

Data Model Change:

The Column 'ClientProgramId' included in the Documents table.

Author: Santosh Huggi

35.EII # 126757: Clinical Data Access Control: Core Documents: Initialization of the data Program to Program based on 'ClientProgramId' instead 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change**|** **Priority:** Urgent

Prerequisites:
1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
3. Client has a signed document.

Navigation Path 1: 'Client' – Select any of the below-mentioned documents - New - Select a Program (E.g. Program 1) in the program selection pop up**.**

Navigation Path 2: 'Client' – Select any of the below-mentioned documents - New - Select different Program (E.g. Program 2) in the program selection pop up.

Functionality 'Before' and 'After' release:

Before this release, data initialization relied on the 'ProgramId' value for program identification, exhibiting consistent behavior.

With this release, the logic has been modified to consider the 'ClientProgramId' value. Now, for the below listed documents, the information/details will initialize from the most recently signed document with the same Program as the one selected from the program selection popup on the current document, based on 'ClientProgramId' column value in the 'Documents' table.

Documents:

- GAD-7 (Core)
- Nursing Assessment
- Mental Status Exam
- COWS
- CIWA
- Personal Effects Property Inventory
- Referral Document
- History and Physical

Data Model Change:

The Column 'ClientProgramId' included in Documents table.

Author: Santosh Huggi

36.EII # 125773: Documents: CDAG Framework changes: Implementation to modify the CDAG logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change **|** **Priority:** Urgent

Prerequisite:

1. System configuration key "DisplayCDAGSectionInStaffDetails" value is set to 'Yes'.

2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path: 'Client' – 'Documents' – Select the required program from 'CDAG Program Enrollment Popup '-- Document Details Screen – Signature Control section – 'Program' dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Program' dropdown options in the following screens were determined by the 'ProgramId':

- Document Details.
- CDAG Program Enrollment Popup.

With this release,

1. The CDAG logic is modified to display programs based on 'ClientProgramId' instead of 'ProgramId' in the document details and the CDAG Program Enrollment Popup screens.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'Documents' table. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
b. Records for deleted documents will not undergo the 'ProgramId' to 'ClientProgramId' correction.
c. If the 'Documents' table 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding documents will not be updated and will remain *NULL*.
d. If the 'Documents' table, 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding documents will not be updated and will remain *NULL*.

Note: There is no change in the UI behavior.

Data Model Change:

The Column ClientProgramId included in Documents table.

Author: Santosh Huggi

37.EII # 126196: Disclosure/Requests, Life Event: Implementation to modify the logic to display programs based on 'ClientProgramId' instead of 'ProgramId'.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change | **Priority:** Urgent

Prerequisites:
1. System configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path 1: 'Client' – 'Disclosure/Requests' list page – click on the 'New' icon – 'Disclosure/Requests Details' screen – 'Program' dropdown.

Navigation Path 2: 'Client' – 'Life Event' list page – click on the 'New' icon – 'Life Event Details' screen – 'Associated Program' dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Program' dropdown options in the following screens were determined by the 'ProgramId':

- Disclosure/Requests details screen.
- Life Event Details screen.

With this release,

1. The CDAG logic is modified to display the 'Program' dropdown options in Disclosure/Requests details and Life Event Details screen, based on 'ClientProgramId' instead of 'ProgramId'.

2. A data correction script is included to update the 'ProgramId' to 'ClientProgramId' data in the 'ClientDisclosures' and 'ClientLifeEvents' tables. However, please note the following:

a. The script will execute only if the system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
b. Deleted records in the 'ClientDisclosures' and 'ClientLifeEvents' will not undergo the 'ProgramId' to 'ClientProgramId' correction.
c. If the records 'CreatedDate' is before the client's program 'RequestedDate' or 'EnrolledDate' value, the 'ClientProgramId' for the corresponding screen records will not be updated and will remain *NULL*.
d. If the record 'CreatedDate' exceeds the client's program 'DischargedDate' value, the 'ClientProgramId' for the corresponding screen records will not be updated and will remain *NULL*.

Note: There is no change in the UI behavior.

Data Model Change:
The Column ClientProgramId is included in ClientLifeEvents table.
The Column ClientProgramId is included in ClientDisclosures table.

Author: Ramya Nagaraj

38.EII # 124828: Implementation to Add a filter & column for program in 'Documents (Client)'

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Change | **Priority**: Urgent

Prerequisite:

1. The System Configuration key 'EnableClinicalDataAccessGrouping' value be set to 'Yes'.

2. The System Configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.

3. The Staff is mapped to any one Clinical Data Access Group (CDAG) on the 'Staff Details' screen.

4. The Staff is mapped to corresponding CDAG programs on the 'Staff Details' screen.

5. The Client is enrolled in some programs (that are available in CDAG group).

Navigation Path: 'Client' - 'Documents'.

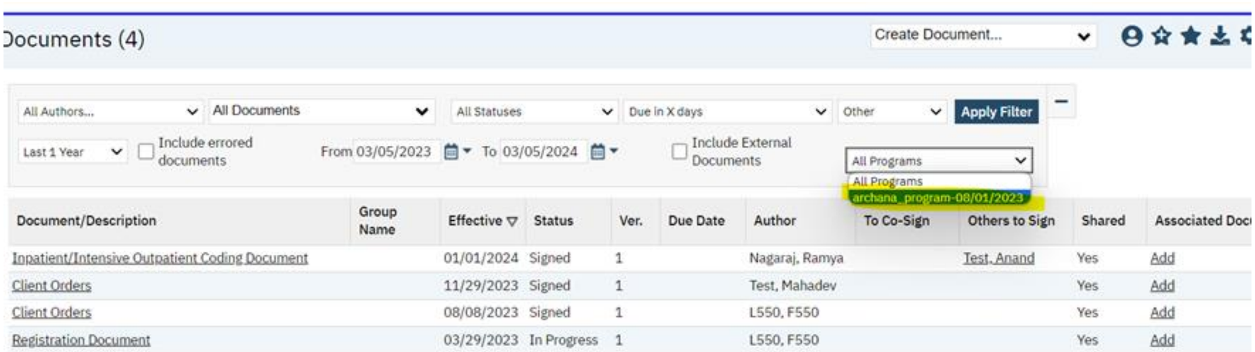
Functionality 'Before' and 'After' release:

With this release, a new 'Program' dropdown is implemented in Documents (Client) list screen which is used to show a user all of the programs that are both in their CDAG and for which the client has documents related to the program.

This program dropdown will have all the programs that overlap in the logged-in CDAG profile, Client enrolled programs, and program associated in staff details.

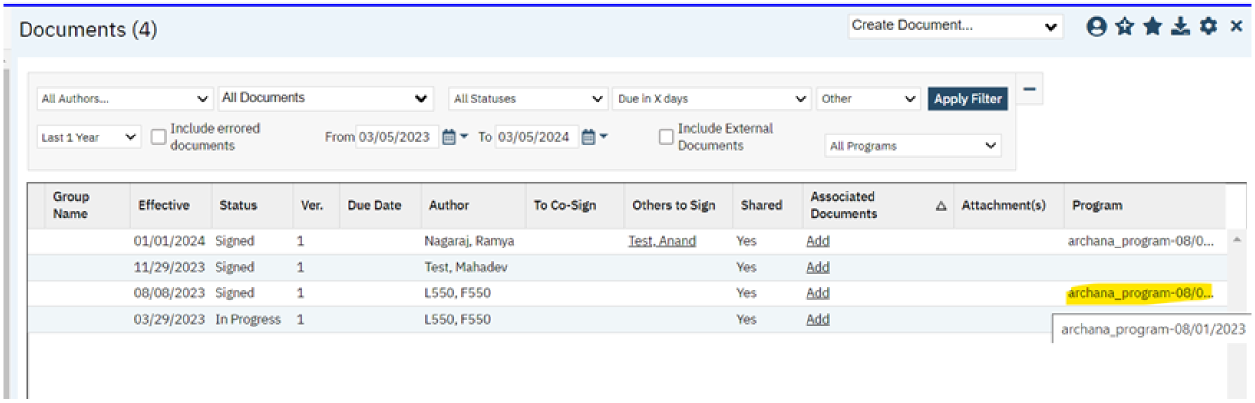
'All programs' is the default value that is selected in the 'Program' dropdown.

The Program Display format is same as it is in the "Document Program Selection popup".



A New column named 'Program' is added after 'Attachment(s)' column in Document list grid which will display the program name that are associated to documents.

The program display format in the grid is same as it is in the "Document Program Selection popup. Mouse hover on the program name will display a tooltip where full name of the program will be displayed.



When there are no programs mapped for a document, the 'Program 'column value in Document list grid will display blank value for such corresponding documents.

CM Events

Reference No	Task No	Description
39	Core Bugs # 127101	count mismatch in the 'CM Authorizations' and 'Combined Authorizations ' list pages.

Author: Renuka Gunasekaran

39.Core Bugs # 127101: count mismatch in the 'CM Authorizations' and 'Combined Authorizations ' list pages.

Release type: Fix **|** **Priority:** Medium

Navigation path1: 'Client'- 'CM Event'- 'new'- Event as 'authorization request', Select 'Status', 'Insurer' and 'Provider' - 'Notes' tab - Select 'Status',' Site', 'Start Date', 'End Date', 'How Often', 'Req Units', 'Total Units', 'Code'(select Billing code with modifier or Billing code which does not have modifier) -'Insert' - Sign

Navigation Path 2: 'My Office' - 'Combined Authorization'

Functionality Before and After

Before this release, here was the behavior. 'Authorization request event' records were not displayed in 'Combined Authorization' screen when 'Authorization request event' was created using billing code with modifier and billing code which does not have modifier, due to this there was a count mismatch in the 'CM Authorizations' and 'Combined Authorizations ' List pages .

After this release, the above-mentioned issue has been resolved. Now the 'Authorization Request event' records are added in 'Combined Authorization' screen and the count is displayed same for both 'CM Authorizations' and 'Combined Authorizations ' List pages.

Compliance Core

Reference No	Task No	Description
~~40~~	~~EII # 126831~~	~~Custom hook has been added to the files to generate NY PAS 26 Reporting and NY PAS 126 Reporting.~~

~~**Author:** Sheelu Ashok~~

~~40.EII # 126831: Custom hook has been added to the files to generate NY PAS 26 Reporting and NY PAS 126 Reporting.~~

~~**Release Type:** Change | **Priority:** Medium~~

~~**Navigation Path:** **N/A**~~

~~**Purpose:** Core SCSP Needs to be released as core for Compliance Batch List Page and Detail Page. This is needed for New York PAS 26 Reporting process and New York PAS 126 Reporting process.~~

~~**Functionality 'Before' and 'After' release:**~~

~~With this release, a custom hook has been added to scsp_SCDACSBatchActions.sql as this is needed for New York PAS 26 Reporting process and New York PAS 126 Reporting process.~~

~~**Note:**~~

- ~~This implementation is done for a New York state's customers and will work for the customer environments who are using the custom logic.~~

Coverage Plans

Reference No	Task No	Description
41	Core Bugs # 126894	Coverage: The start date field clears the data when trying to add Client Plan.

Author: Shivkanth Moger

41.Core Bugs # 126894: Coverage: The start date field clears the data when trying to add Client Plan.

Release Type: Fix | **Priority:** Medium

Navigation Path: Select any client – 'Coverage' – 'Coverage' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Coverage' screen, when the user tried to add the Plan in the Plan time Spans section and clicked on add button, then the entered start date was getting cleared.

With this release, the above-mentioned issue is resolved. Now, in the 'Coverage' screen, when the user adds the Plan in the Plan time Spans section, the entered start date is retained when clicked on the add button.

CQM

Reference No	Task No	Description
42	Core Bugs # 127040	Updating the CQM Measure Value Sets for Concept code - CMS 2 (99401,99402,99403,99404) and CMS 159.
43	Core Bugs # 127191	CQM medication query is causing reports to take a long time to run.

Author: Boovendiran Chinnusamy

42.Core Bugs # 127040: Updating the CQM Measure Value Sets for Concept code - CMS 2 (99401,99402,99403,99404) and CMS 159.

Release Type: Fix | **Priority:** Medium

Navigation Path: 'Administration' -- 'Procedure/Rates' -- 'Procedure Code Details' screen -- 'CQM Configurations' tab -- click on 'Search…' -- 'MeasureSetValueSearch' Pop-Up window.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Measure Set Value Search' Pop-Up, the CQM Measure Value Set for concept code 'CMS 2 (99401,99402,99403,99404) and CMS 159' was not displayed.

With this release, the above-mentioned issue has been resolved. Now, the CQM Measure Value Set for concept code 'CMS 2 (99401,99402,99403,99404) and CMS 159' is displayed in the 'Measure Set Value Search' Pop-Up.

Author: Boovendiran Chinnusamy

43.Core Bugs # 127191: CQM medication query is causing reports to take a long time to run.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: 'My Office' – 'CQM Solutions' -- 'CQM Solutions' application -- Queued Report -- Click on 'Create Report' -- 'Queue A Report' screen – Select/enter required details -- Click on 'Queue Report' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to Queue the CQM report which was having medications, it was taking a long time to load.

With this release, the above-mentioned issue has been resolved. Now, the CQM is loading the report without any delay when the user tries to Queue the CQM report which is having medications.

Data Warehouse Job

Reference No	Task No	Description
44	Core Bugs # 126878	Data Warehouse history and the amount of time to load DW jobs have been getting longer.

Author: Munish Sood

44.Core Bugs # 126878: Data Warehouse history and the amount of time to load DW jobs have been getting longer.

Release Type: Fix **| Priority:** High

Navigation Path: N/A

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Data Warehouse history showed that the Data Warehouse job execution time was increasing and taking longer time to execute than its usual time. This was creating a potential issue for the other jobs those generate encounters and BHTEDS records.

With this release, the above-mentioned issue has been fixed. Now, an index has been added to the source database to improve the performance of the Data Warehouse job.

Documents

Reference No	Task No	Description
45	EII # 126816	Custom hook has been added to 'Core TEDS Data Set' document to display the 'Custom Fields' tab for state core 'Core TEDS Data Set' document.
46	EII # 124444	Implemented the 'CAMS SUICIDE STATUS FORM–4 (SSF-4)' and 'CAMS Therapeutic Worksheet: Understanding Your Suicidality' documents.
47	Core Bugs # 127015	Unable to delete cosigner form the list from the signed Documents.
48	Core Bugs # 127034	DSM 5: The selected data from the grid for the document is getting cleared when user tried to click on any fields.
49	Core Bugs # 126572	The 'Care Plan' & 'Care Plan Review' Page is not aligned properly.

50	Core Bugs # 127086	Assessment: The 'LOCUS Result Description' field is displayed as blank when the 'LOCUS Result' score is 255 in the Summary tab.
51	Core Bugs # 127216	Goals or Objectives are not displayed in the Care Plan PDF.
52	Core Bugs # 126899	Diagnosis Document: Error is displayed while signing the Diagnosis document.
53	Core Bugs # 127194	Registration document: incorrect logo is displaying.
54	Core Bugs # 127130	Documents List page width issue.

Author: Veena Santosh

45.EII # 126816: Custom hook has been added to 'Core TEDS Data Set' document to display the 'Custom Fields' tab for state core 'Core TEDS Data Set' document.

DISCLAIMER: The document is only available to those customers who have purchased an annual subscription. It is a premium add-on to SmartCare and not included in SmartCare Base Subscription. If you are interested in learning more about this document, please contact your account manager.

Release Type: Change **|** **Priority:** Urgent

Navigation Path: 'Client' – 'Documents' – 'Core TEDS Data Set' document

Functionality 'Before' and 'After' release:

With this release, for Core 'Core TEDS Data Set' document, a custom hook has been added to display a 'Custom Fields' tab in the state core 'Core TEDS Data Set' document.

Note:

1. This is for New Hampshire state customers and dependent on state fix, which is to be released in SC.NH.6.0_0.02.000.2403.001.

Author: Praveen Gangadhara

46.EII # 124444: Implemented the 'CAMS SUICIDE STATUS FORM–4 (SSF-4)' and 'CAMS Therapeutic Worksheet: Understanding Your Suicidality' documents.

DISCLAIMER: The document is only available to those customers who have purchased an annual subscription. It is a premium add-on to SmartCare and not included in SmartCare Base Subscription. If you are interested in learning more about this document, please contact your account manager.

Release Type: New Functionality | **Priority:** High

Navigation Path 1: Client – Documents – 'CAMS SUICIDE STATUS FORM–4 (SSF-4)'.

Navigation Path 2: Client – Documents – 'CAMS Therapeutic Worksheet: Understanding Your Suicidality'.

Functionality 'Before' and 'After' release:

Purpose: To understand the route that causes suicidal thoughts in the client session by session in a single document. The first session is for initial assessment and treatment planning; the interim session focuses on treating suicidal drivers and treatment plan updates; and the final session is to complete the outcome or disposition**.**

With this release, the following documents are implemented,

- 'CAMS SUICIDE STATUS FORM–4 (SSF-4)'.
- 'CAMS Therapeutic Worksheet: Understanding Your Suicidality'.

I. The **'CAMS SUICIDE STATUS FORM–4 (SSF-4)'** document contains only one 'General' tab.

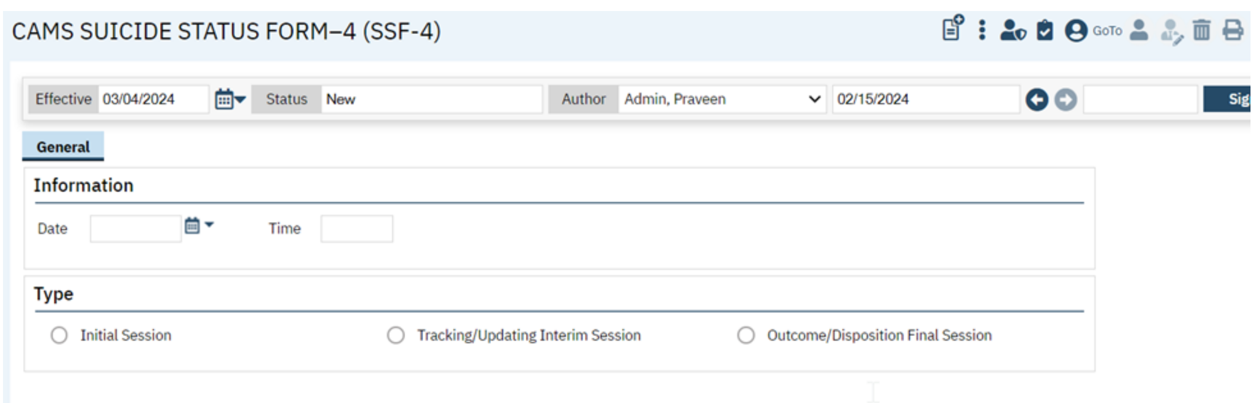
The General' tab contains sections as mentioned below:

a) 'Information' section:

- Date: This is a Date control field and displayed with 'MM/DD/YYYY' format.
- Time: This is a text box and displayed in the HH:MM AM/PM' format.

b) 'Type' section: The section is displayed with following radio buttons,

- Initial Session
- Tracking/Updating Interim Session
- Outcome/Disposition Final Session



Note: Based on the radio button selection in the 'Type' section, the associated sections will display.

1.If user select **'Initial Session'** radio button, the below mentioned sections will display:

i. Section A (Client)

ii. Section B (Clinician)

iii. Section C (Clinician)

iv. Section D (Clinician Post Session Evaluation)

i. The **'Section A (Client)'** is displayed in the below mentioned table format:

Section A (Client)

Rank	Rate and fill out each item according to how you feel right now. Then rank in order of importance 1 to 5 (1 = most important to 5 = least important)	
	1) RATE PSYCHOLOGICAL PAIN (hurt, anguish, or misery in your mind, **not** stress, **not** physical pain):	Low 1 2 3 4 5 High
	What I find most painful is	
	2) RATE STRESS (your general feeling of being pressured or overwhelmed):	Low 1 2 3 4 5 High
	What I find most stressful is	
	3) RATE AGITATION (emotional urgency; feeling that you need to take action; **not** irritation; **not** annoyance):	Low 1 2 3 4 5 High
	I most need to take action when	
	4) RATE HOPELESSNESS (your expectation that things will not get better no matter what you do):	Low 1 2 3 4 5 High
	I am most hopeless about	
	5) RATE SELF-HATE (your general feeling of disliking yourself; having no self-esteem; having no self-respect):	Low 1 2 3 4 5 High
	What I hate most about myself is	
N/A	6) RATE OVERALL RISK OF SUICIDE	**Extremely low risk: (will not kill self)** 1 2 3 4 5 **Extremely high risk: (will kill self)**

		1 2 3 4 5	
1) How much is being suicidal related to thoughts and feelings about yourself?	**Not at all:**		**: Completely**
2) How much is being suicidal related to thoughts and feeling about others?	**Not at all:**		**: Completely**

Please list your reasons for wanting to live and your reasons for wanting to die. Then rank in order of importance 1 to 5.

Rank	REASON FOR LIVING	Rank	REASON FOR DYING

		1 2 3 4 5 6 7 8	
I wish to live to the following extent	**Not at all:**		**:Very much**
I wish to die to the following extent	**Not at all:**		**:Very much**

The one thing that would help me no longer feel suicidal would be:

- Column 1: Rank : This is a label. The associated text box fields allow the user to enter only numbers from '1-5' digits.

- Column 2: 'Rate and fill out each item according to how you feel right now. Then rank in order of importance 1 to 5 (1 = most important to 5 = least important)': This is a label.

1) RATE PSYCHOLOGICAL PAIN (hurt, anguish, or misery in your mind, not stress, not physical pain):' This is a label displayed with a radio button Low to High options with rating '1 – 5'.

'What I find most painful is:' This is a text box field (Row 1).

2) RATE STRESS (your general feeling of being pressured or overwhelmed):' This is a label displayed with a radio button Low to High options with rating '1 – 5'.
'What I find most stressful is:' This is a text box field (Row 2).

3) RATE AGITATION (emotional urgency; feeling that you need to take action; not irritation; not annoyance):' This is a label displayed with a radio button Low to High options with rating '1 – 5'.

'I most need to take action when:' This is a text box field (Row 3).

'4) RATE HOPELESSNESS (your expectation that things will not get better no matter what you do):'This is a label displayed with a radio button Low to High options with rating '1 – 5'.

'I am most hopeless about:' This is a text box field (Row 4).

'5) RATE SELF-HATE (your general feeling of disliking yourself; having no self-esteem; having no self-respect):' This is a label displayed with a radio button Low to High options with rating '1 – 5'.

'What I hate most about myself is:' This is text box field (Row 5).

'6) RATE OVERALL RISK OF SUICIDE:' This is a label displayed with a radio button 'Extremely low risk (will not kill self):' to 'Extremely high risk (will kill self)' options with rating '1-5'.

'1) How much is being suicidal related to thoughts and feelings about yourself?': This is a label displayed with a radio button 'Not at all' to 'Completely' options with rating '1 – 5'.

'2) How much is being suicidal related to thoughts and feeling about others?' : This is a label displayed with a radio button 'Not at all' to 'Completely' options with rating '1 – 5'.

'Please list your reasons for wanting to live and your reasons for wanting to die. Then rank in order of importance 1 to 5.': This is a label.

The below mentioned grid is displayed with following columns:

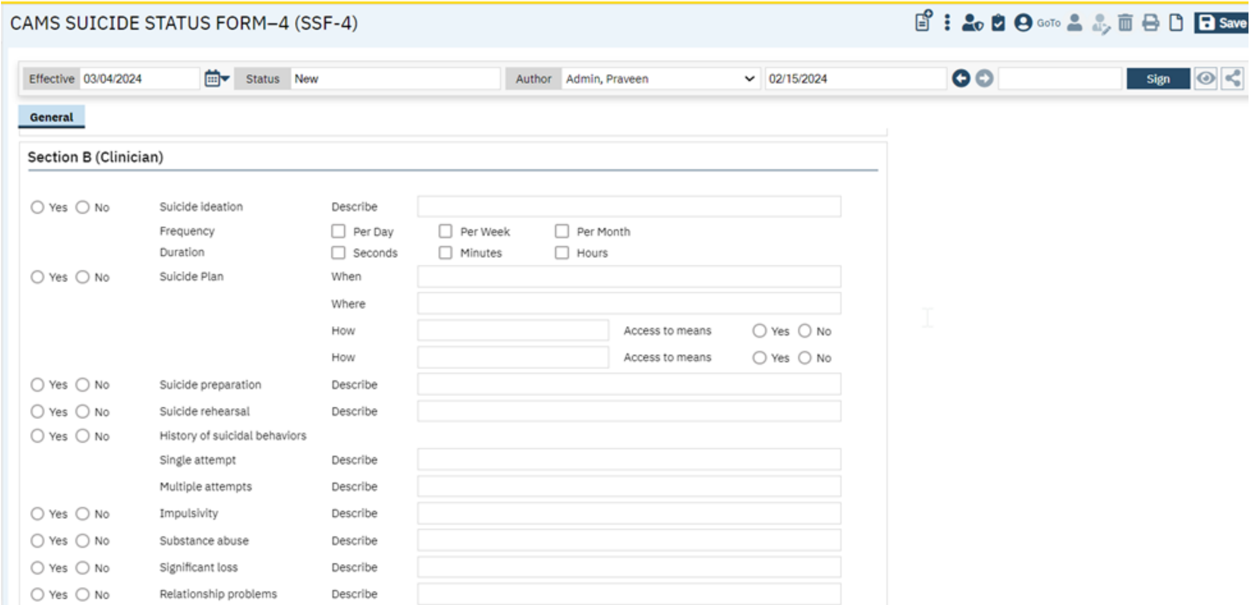
- Rank
- Reason for Living
- Rank
- Reason for Dying

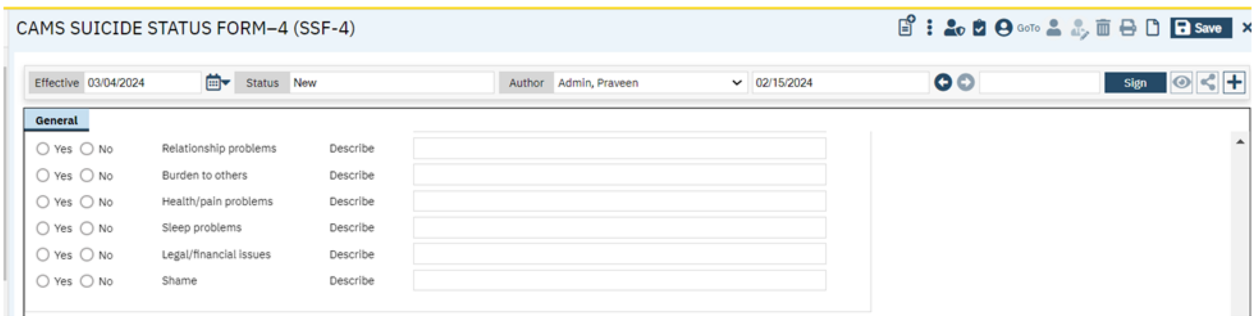
'I wish to live to the following extent': This is a label displayed with a radio button 'Not at all' to 'Very much' options with rating '1 – 8'.

'I wish to die to the following extent': This is a label displayed with a radio button 'Not at all' to 'Very much' options with rating '1 – 8'.

'The one thing that would help me no longer feel suicidal would be:' This is text area field.

ii. The '**Section B (Clinician)**' is displayed with below mentioned fields:





Suicide ideation: This is a radio button which is displayed with 'Yes' and 'No' options.

Describe: This is a text box.

Frequency: This is a check box which is displayed with options such as 'Per day', 'Per week' and 'Per month'.

Duration: This is a check box which is displayed with options such as 'Seconds', 'Minutes' and 'Hours'.

Suicide plan: This is a radio button which is displayed with 'Yes' and 'No' options.

When: This is a text box.

Where: This is a text box

How: This is a text box.

Access to means: This is a radio button which is displayed with 'Yes' and 'No' options.

How: This is a text box.

Access to means: This is a radio button which is displayed with 'Yes' and 'No' options.

Suicide preparation: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Suicide rehearsal: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

History of suicidal behaviors: This is a radio button which is displayed with 'Yes' and 'No' options.

Single attempt: This is a label which is displayed with 'Describe': text box field.

Multiple attempts: This is a label which is displayed with the 'Describe' text box field.

Impulsivity: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Substance abuse: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Significant loss: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Relationship problems: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Burden to others: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

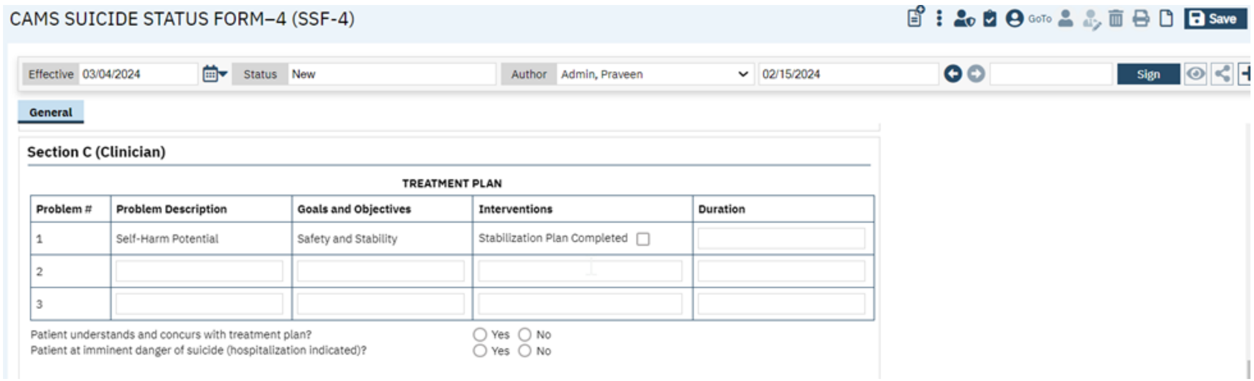
Health/pain problems: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Sleep problems: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Legal/financial issues: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

Shame: This is a radio button which is displayed with 'Yes' and 'No' options and next to this the 'Describe' textbox field is displayed.

iii. The 'Section C (Clinician)' is displayed with below mentioned fields as table format:



TREATMENT PLAN: This is a table's label name.

The Treatment Plan table is displayed with below mentioned column names,

Problem #: This is a textbox field (Column1)

Problem Description: This is a textbox field(Column 2).

Goals and Objectives: This is a textbox field (Column 3).

Interventions: This is a textbox field(Column 4).

Duration: This is a textbox field (Column 5).

By default, 1st row is filled with the below data:

Problem #:1

Problem Description: Self-Harm Potential.

Goals and Objectives: Safety and Stability.

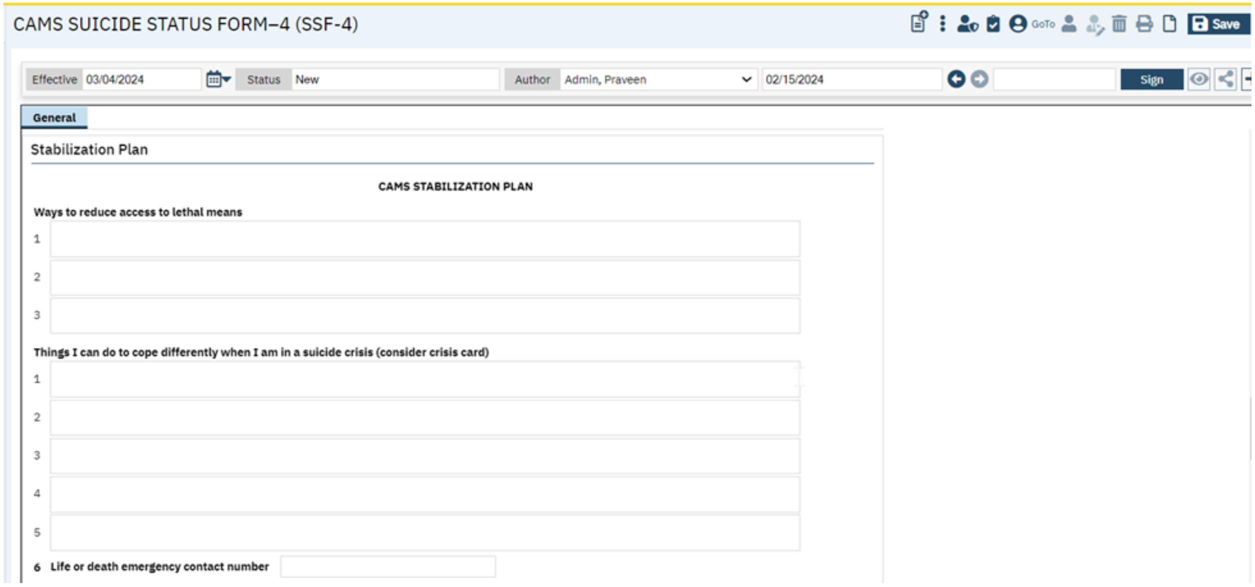
Interventions: Stabilization Plan Completed (Checkbox).

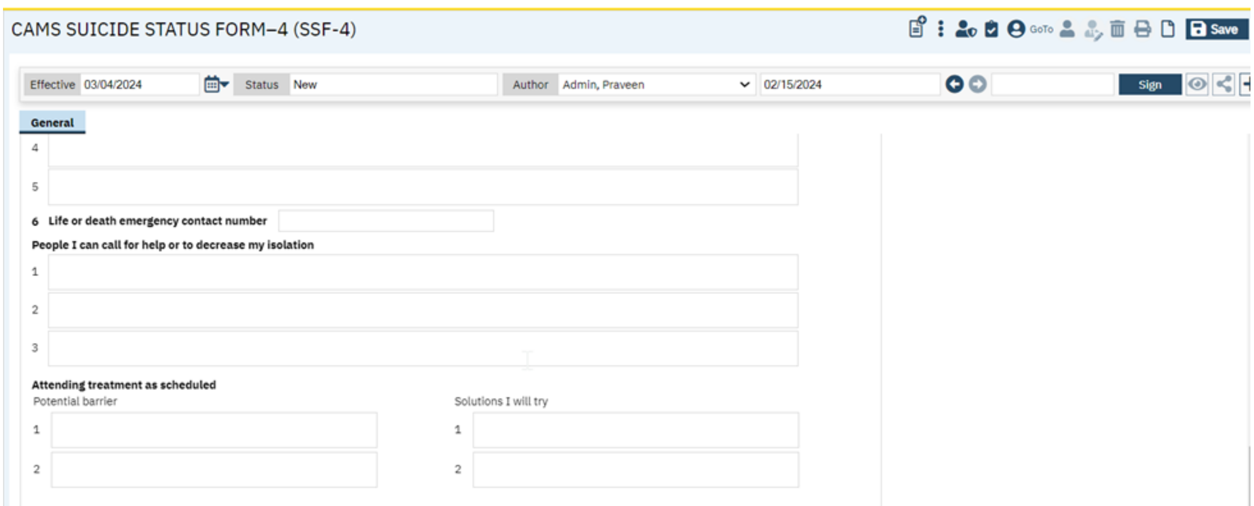
Duration: Text Box

'Patient understands and concurs with treatment plan?' : This is a radio button which is displayed with 'Yes' and 'No' options.

'Patient at imminent danger of suicide (hospitalization indicated)?': This is a radio button which is displayed with 'Yes' and 'No' options.

The **'Stabilization Plan'** section is displayed with below mentioned fields:





'CAMS STABILIZATION PLAN' : This is the header text.

'Ways to reduce access to lethal means: This is text area field(Three Text area fields).

'Things I can do to cope differently when I am in a suicide crisis (consider crisis card):' This is text area field (Five Text area fields).

Life or death emergency contact number:' This is a textbox field.

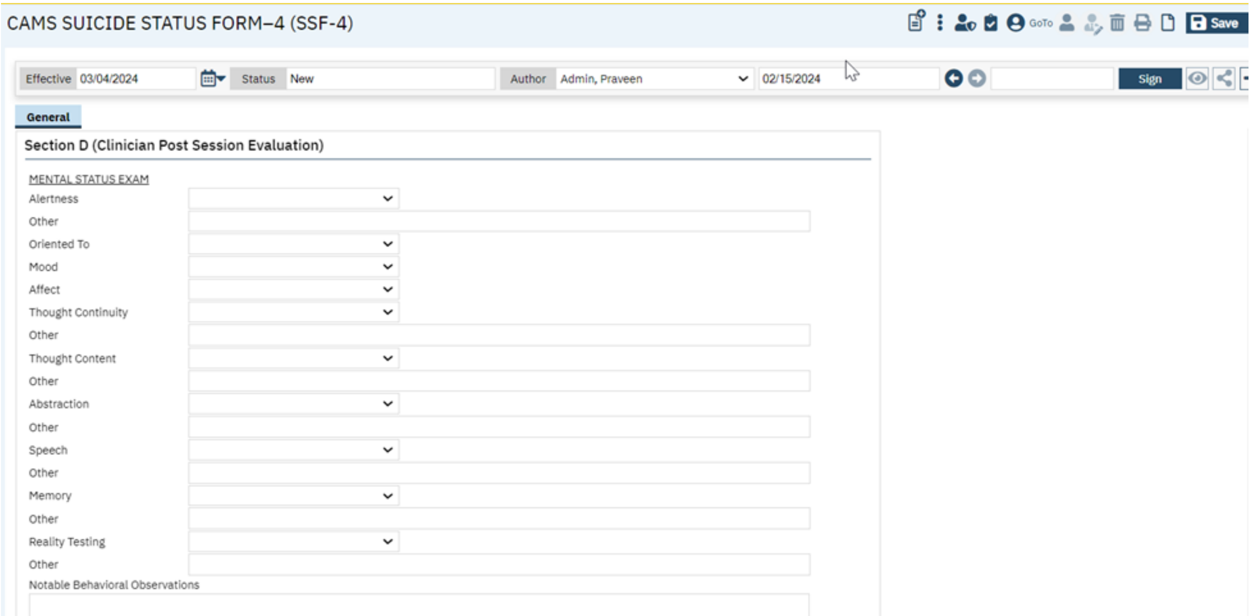
People I can call for help or to decrease my isolation: This is a text area field(Three Text area fields).

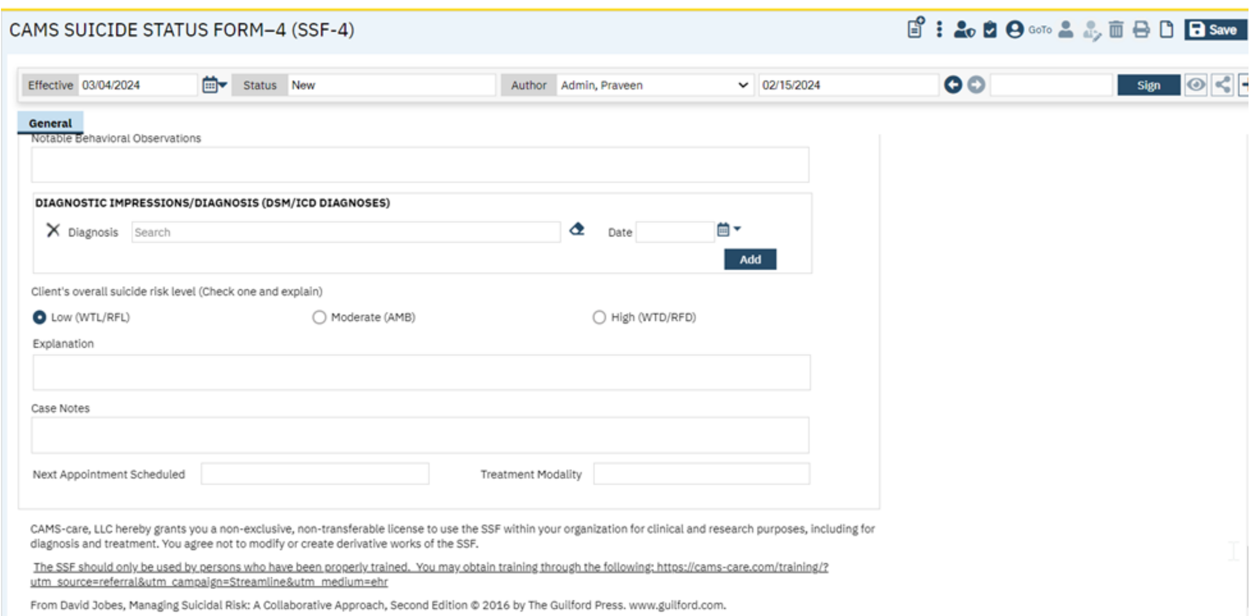
Attending treatment as scheduled: This is a label.

Potential barrier: This is a text area field (Two Text area fields).

Solutions I will try: This is a text area field(Two Text area fields).

iv. The **'Section D (Clinician Post Session Evaluation)'** is displayed with below mentioned fields:





'Mental Status Exam': This is header text.

Alertness: This is a drop down field and the below options are displayed.

- Alert
- Drowsy
- Lethargic
- Stuporous

Other: This is a text field.

Oriented To: This is a drop down field and below options will be displayed.

- Person
- Place
- Time
- Reason for Evaluation

Mood: This is a drop down field and the below options will be displayed.

- Euthymic
- Elevated
- Dysphoric
- Agitated
- Angry

Affect: This is a drop down field and the below options will be displayed.

- Flat
- Blunted
- Constricted
- Appropriate
- Labile

Thought Continuity: This is a drop down field and below options will be displayed.

- Clear & Coherent
- Goal-Directed
- Tangential
- Circumstantial

Other: This is a text field.
Thought Content: This is a drop down field and below options will be displayed.

- Obsessions
- Delusions
- Ideas Of Reference
- Bizarreness
- Morbidity

Other: This is a text field.

Abstraction: This is a drop down field and the below options will be displayed.

- WNL
- Notably Concrete

Other: This is a text field.
Speech: This is a drop down field and the below options will be displayed.

- WNL
- Rapid
- Slow
- Slurred
- Impoverished
- Incoherent

Other: This is a text field.

Memory: This is a drop down field and displayed with 'Grossly Intact' option.

Other: This is a text field.

Reality Testing: This is a drop down field and displayed with 'WNL' option.

Other: This is a text field.

Notable Behavioral Observations: This is a Text area field.

DIAGNOSTIC IMPRESSIONS/DIAGNOSIS (DSM/ICD DIAGNOSES) is displayed with below mentioned fields.

Diagnosis: This is Type able Search Text Box.

Date: This is a date control field.
Add: This is a button , on clicking Add button, if the data is not entered, the validation is shown asking the user to select the diagnosis.

Delete: Delete icon is displayed, on click of delete icon it will delete the diagnosis.
Erase: Erase icon is displayed. On click of the Erase icon, it will clear the data.

'Client's overall suicide risk level (Check one and explain):' This is a radio button field and displayed with below options :

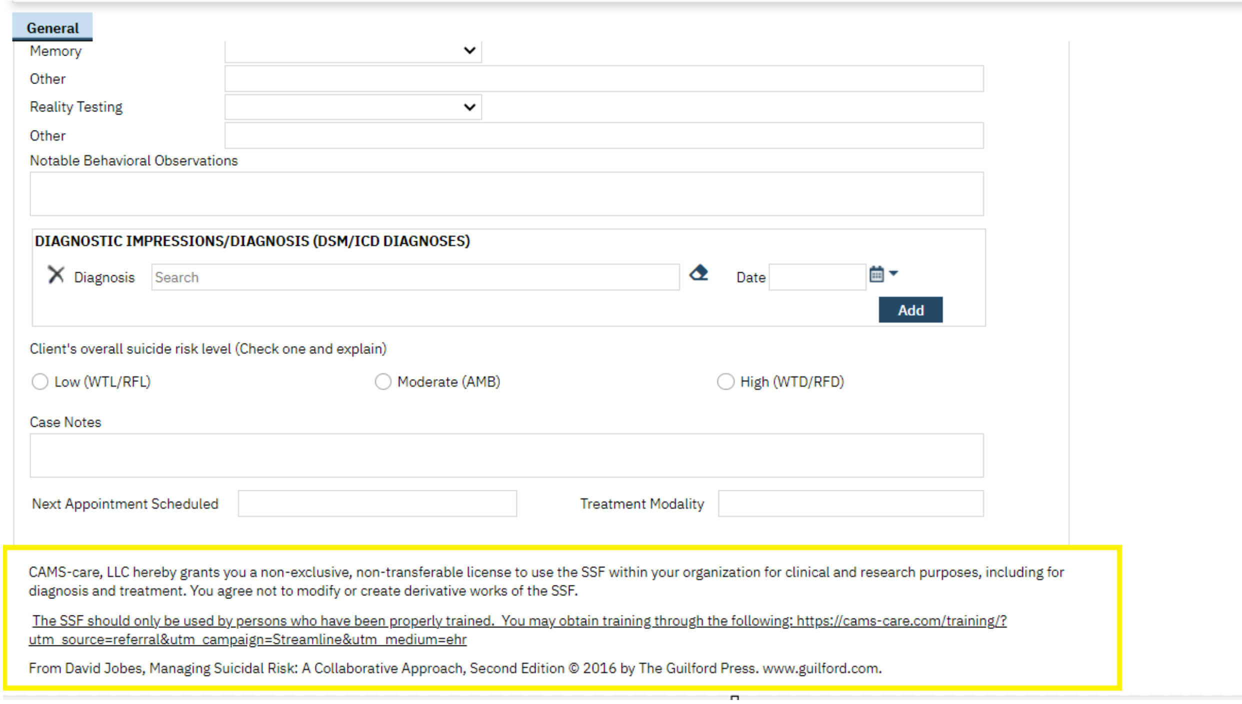
- Low (WTL/RFL)
- Moderate (AMB)
- High (WTD/RFD)

On selecting any value of the radio button for 'Client's overall suicide risk level (Check one and explain) the 'Explanation' text area field will display.

Case Notes: This is a text area field.

Next Appointment Scheduled: This is a text box.

Treatment Modality: This is a textbox.



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'The SSF should only be used by persons who have been properly trained. You may obtain training through the following: https://cams-care.com/training/?utm_source=referral&utm_campaign=Streamline&utm_medium=ehr' as hyperlink field (This hyperlink text should only display in UI not in PDF).

'From David Jobes, Managing Suicidal Risk: A Collaborative Approach, Second Edition © 2016 by The Guilford Press. www.guilford.com.' as label.

Note : The above 3 statements are common for all the 3 types ('Initial Session', 'Tracking/Updating Interim session, 'Outcome/Disposition Final Session'.)

PDF : If this document is the Initial Session, then in the PDF, Sections A, B, and C will only print.

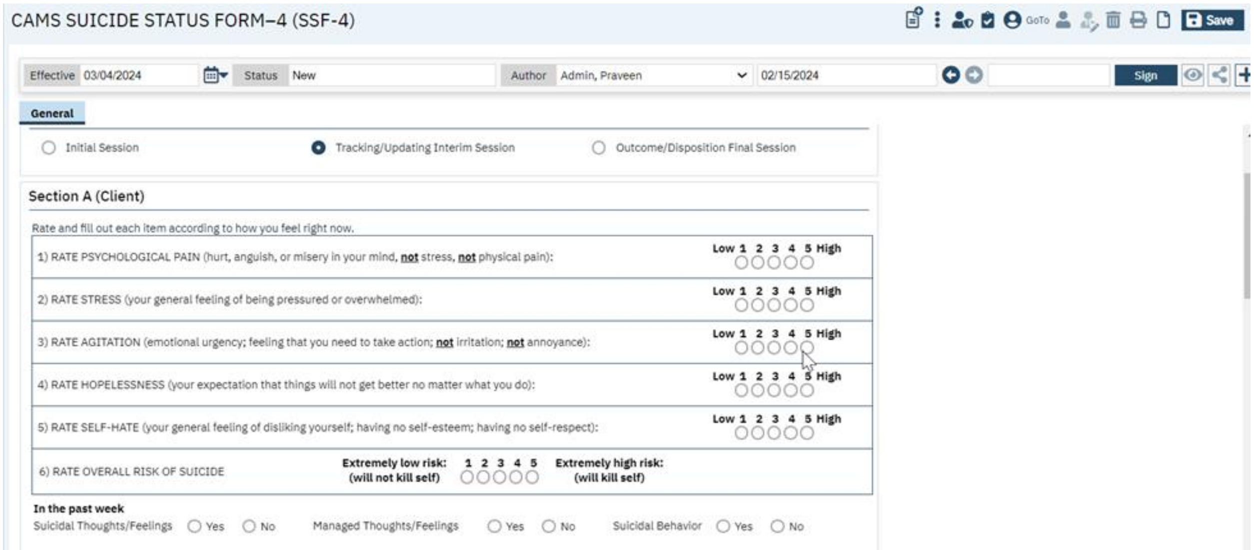
2. If the user selects '**Tracking/Updating Interim Session**' radio button, the below mentioned sections will display:

i. Section A (Client)

ii. Section B (Clinician)

iii. Section C (Clinician Post Session Evaluation)

i. The '**Section A (Client)**' is displayed with below mentioned fields in the table format:



‘Rate and fill out each item according to how you feel right now’ : This is a label

‘1) RATE PSYCHOLOGICAL PAIN (hurt, anguish, or misery in your mind, not stress, not physical pain):’This is a label and displayed with radio button options Low to High with rating ‘1 – 5’.

‘2) RATE STRESS (your general feeling of being pressured or overwhelmed):’ This is a label and displayed with radio button options Low to High with rating ‘1 – 5’.

‘3) RATE AGITATION (emotional urgency; feeling that you need to take action; not irritation; not annoyance):’ This is a label and displayed with radio button options Low to High with rating ‘1 – 5’.

‘4) RATE HOPELESSNESS (your expectation that things will not get better no matter what you do):’ This is a label and displayed with radio button options Low to High with rating ‘1 – 5’.

‘5) RATE SELF-HATE (your general feeling of disliking yourself; having no self-esteem; having no self-respect):’ This is a label and displayed with radio button options Low to High with rating ‘1 – 5’.

‘6) RATE OVERALL RISK OF SUICIDE:’ This is a label displayed with radio button ‘Extremely low risk (will not kill self):’ to ‘Extremely high risk (will kill self)’ with rating ‘1 – 5’.

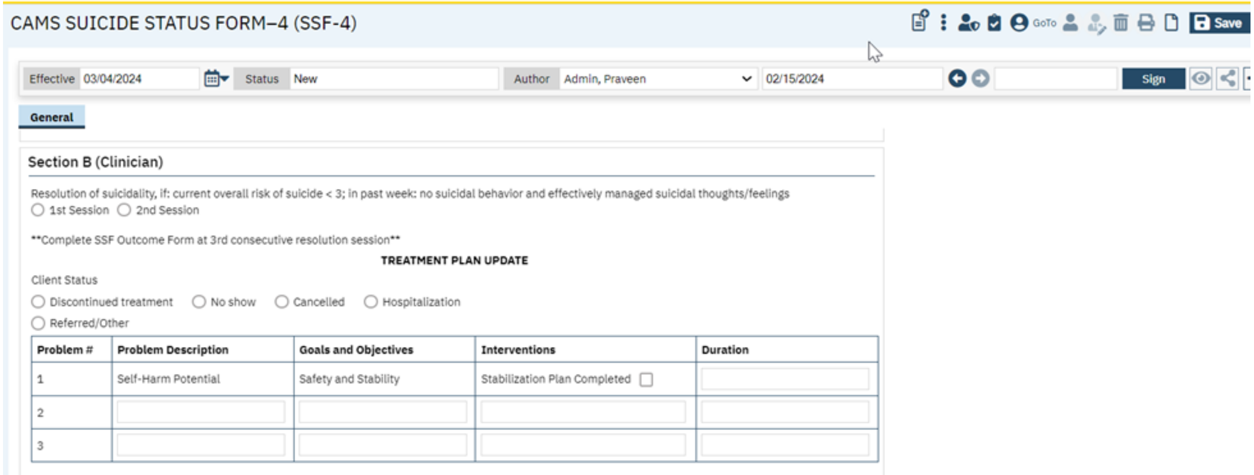
In the past week: This is a label.

Suicidal Thoughts/Feelings: This is a radio button displayed with ‘Yes’ and ‘No’ options.

Managed Thoughts/Feelings: This is a radio button displayed with ‘Yes’ and ‘No’ options.

Suicidal Behavior: This is a radio button displayed with ‘Yes’ and ‘No’ options.

ii. The **Section B (Clinician)’** is displayed with below mentioned fields:



'Resolution of suicidality, if: current overall risk of suicide < 3; in past week: no suicidal behavior and effectively managed suicidal thoughts/feelings is displayed with radio buttons 1st session and 2nd session options.
Complete SSF Outcome Form at 3rd consecutive resolution session : This is a label.

'TREATMENT PLAN UPDATE': This is a header text.

Client Status is displayed with below mentioned radio button options:

- Discontinued treatment
- No show
- Cancelled
- Hospitalization
- Referred/Other

Note: If the 'Referred/Other' radio button is selected, then the text box will be displayed next to this option.

The 'TREATMENT PLAN UPDATE': The table is displayed with below mentioned column names,

Problem #: This is a textbox field (Column1)

Problem Description: This is a textbox field(Column 2).

Goals and Objectives: This is a textbox field (Column 3).

Interventions: This is a textbox field (Column 4).

Duration: This is a textbox field (Column 5).

By default, 1st row is filled with the below data:

Problem #:1

Problem Description: Self-Harm Potential

Goals and Objectives: Safety and Stability

Interventions: Stabilization Plan Completed (Checkbox)

Duration: Text Box.

iii. The Section C (Clinician Post Session Evaluation): The same 'Initial Session' option fields will be displayed under this section.

PDF : If this document is the Tracking/Updating Interim Session, then in PDF, Sections A, and B will only print.

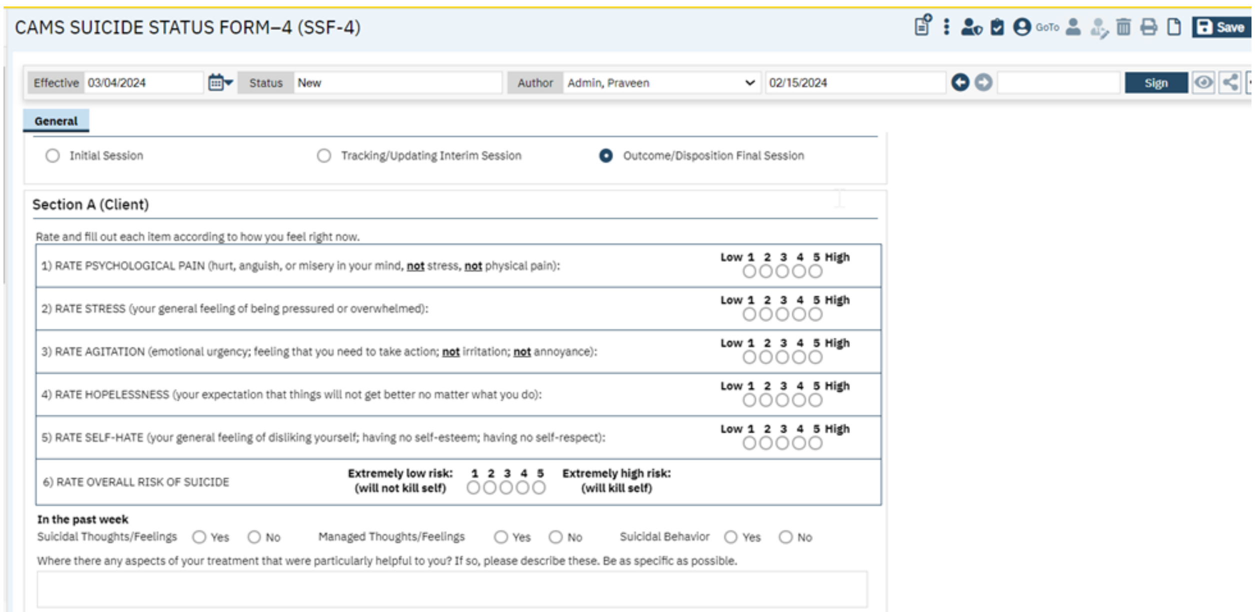
3. If the user selects the '**Outcome/Disposition Final Session**' radio button, the below mentioned sections will be displayed.

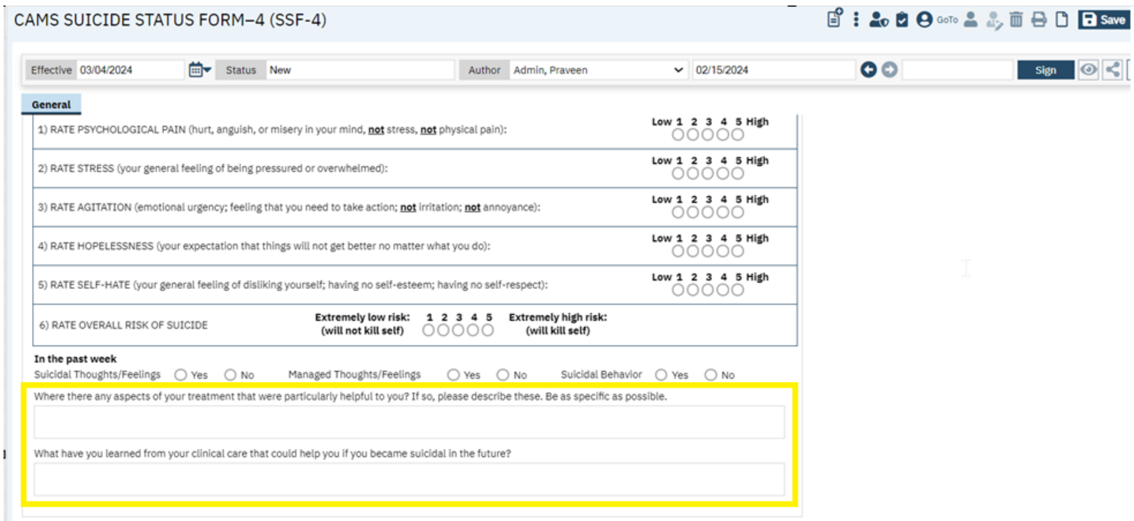
i. Section A (Client)

ii. Section B (Clinician)

iii. Section C (Clinician Post Session Evaluation)

i. '**Section A (Client)**' : The section is displayed with the same fields as the 'Tracking/Updating Interim Session ' options along with the following fields .

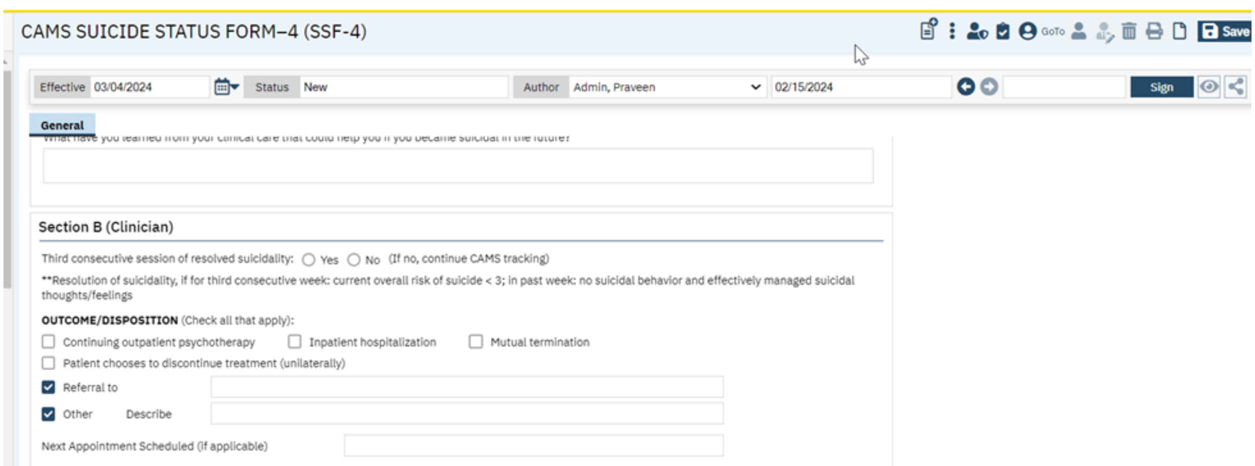




'Where there any aspects of your treatment that were particularly helpful to you? If so, please describe these. Be as specific as possible.: This is a text area field.

'What have you learned from your clinical care that could help you if you became suicidal in the future?': This is a text area field.

ii. 'Section B (Clinician)' : The section is displayed with the below mentioned fields.



Third consecutive session of resolved suicidality: (If no, continue CAMS tracking) : is displayed with 'Yes' and 'No' radio button options.

**Resolution of suicidality, if for third consecutive week: current overall risk of suicide < 3; in past week: no suicidal behavior and effectively managed suicidal thoughts/feelings' : This is a label.

'OUTCOME/DISPOSITION (Check all that apply):' This is a check box displayed with below mentioned values.

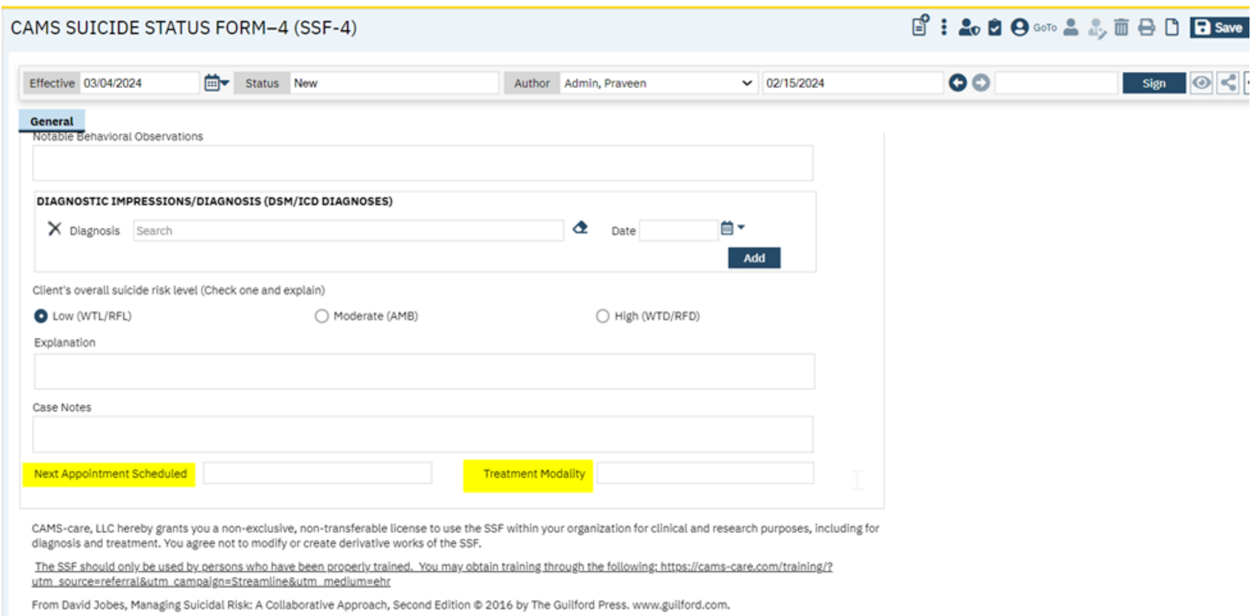
- Continuing outpatient psychotherapy
- Inpatient hospitalization
- Mutual termination
- Patient chooses to discontinue treatment (unilaterally)
- Referral to
- Other

Describe: This is a Text box. The textbox is displayed when the 'other' checkbox is selected.
Referral: When this check box is selected, the textbox is displayed next to this.

Next Appointment Scheduled (if applicable):'This is a text box.

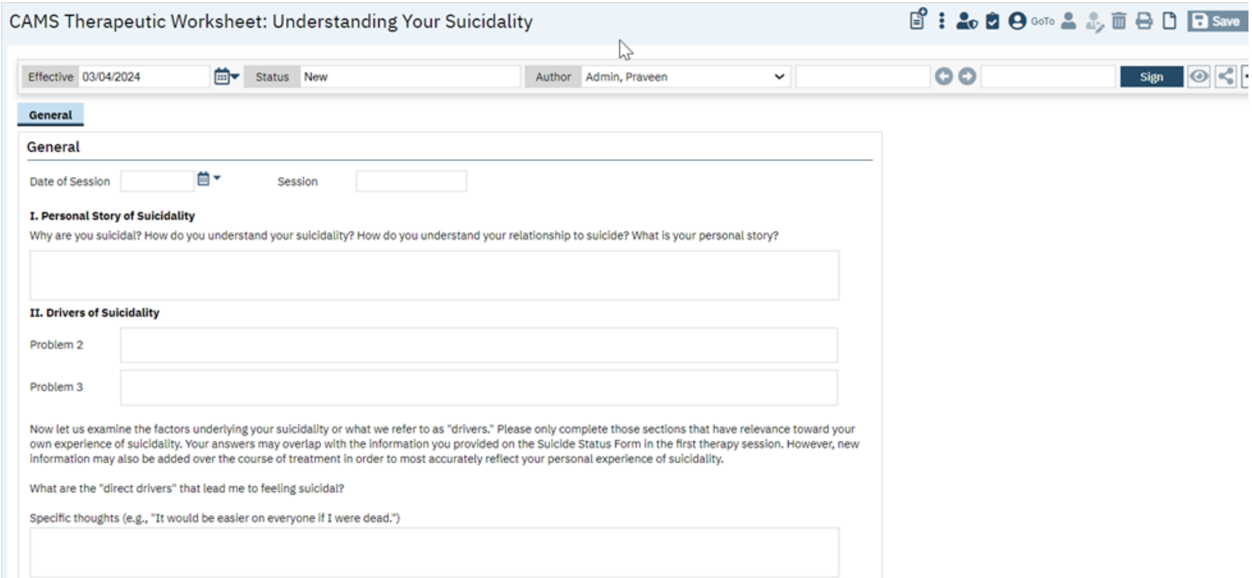
iii. The Section C (Clinician Post Session Evaluation): The same 'Initial Session' option fields will be displayed under this section.

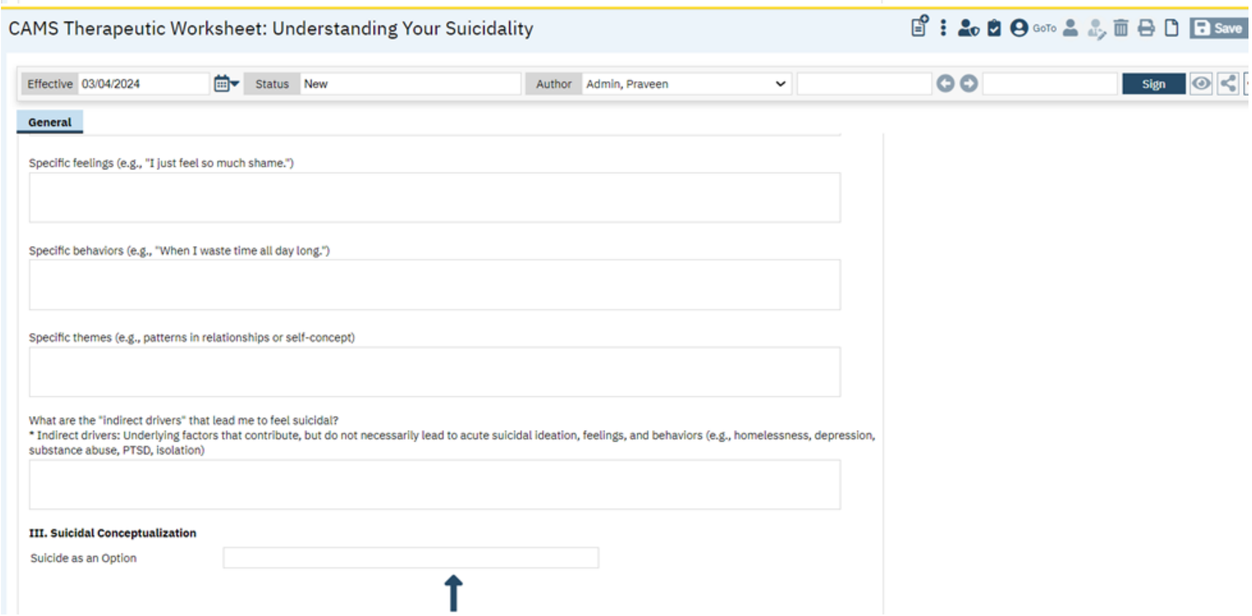
Note: The below mentioned Highlighted fields 'Next Appointment Scheduled' and 'Treatment Modality' are removed in 'Outcome/Disposition Final Session' type.



PDF: If this document is the Outcome/Disposition Final Session, then in PDF, Sections A, and B will only print.

II. The **'CAMS Therapeutic Worksheet: Understanding Your Suicidality'** document is displayed with the General


CAMS Therapeutic Worksheet: Understanding Your Suicidality
Save
Effective 03/04/2024
Status New
Author Admin, Praveen
Sign
General
General
Date of Session
Session
I. Personal Story of Suicidality
Why are you suicidal? How do you understand your suicidality? How do you understand your relationship to suicide? What is your personal story?
II. Drivers of Suicidality
Problem 2
Problem 3
Now let us examine the factors underlying your suicidality or what we refer to as "drivers." Please only complete those sections that have relevance toward your own experience of suicidality. Your answers may overlap with the information you provided on the Suicide Status Form in the first therapy session. However, new information may also be added over the course of treatment in order to most accurately reflect your personal experience of suicidality.
What are the "direct drivers" that lead me to feeling suicidal?
Specific thoughts (e.g., "It would be easier on everyone if I were dead.")


CAMS Therapeutic Worksheet: Understanding Your Suicidality
Save
Effective 03/04/2024
Status New
Author Admin, Praveen
Sign
General
Specific feelings (e.g., "I just feel so much shame.")
Specific behaviors (e.g., "When I waste time all day long.")
Specific themes (e.g., patterns in relationships or self-concept)
What are the "indirect drivers" that lead me to feel suicidal?
* Indirect drivers: Underlying factors that contribute, but do not necessarily lead to acute suicidal ideation, feelings, and behaviors (e.g., homelessness, depression, substance abuse, PTSD, isolation)
III. Suicidal Conceptualization
Suicide as an Option


CAMS Therapeutic Worksheet: Understanding Your Suicidality
Save
Effective 03/04/2024
Status New
Author Admin, Praveen
Sign
General
Suicide as an Option
Describe bridges and barriers to going to the next level
Direct Drivers (transpose information here)

The General tab is displayed with General section:

The General section is displayed with the following fields.

Date of Session: This is a date control field and this is displayed in the format of MM/DD/YYYY.

Session: This is Numeric Field.

i. Personal Story of Suicidality: This is a multiline text box.

Why are you suicidal? How do you understand your suicidality? How do you understand your relationship to suicide? What is your personal story? : This is a textbox label.

ii.Drivers of Suicidality: This is a label.

Problem 2 : This is a text area field.
Problem 3: This is a text area field.

Now let us examine the factors underlying your suicidality or what we refer to as "drivers." Please only complete those sections that have relevance toward your own experience of suicidality. Your answers may overlap with the information you provided on the Suicide Status Form in the first therapy session. However, new information may also be added over the course of treatment in order to most accurately reflect your personal experience of suicidality.

What are the "direct drivers" that lead me to feeling suicidal? : This is a text area

Specific thoughts (e.g., "It would be easier on everyone if I were dead.") : This is a text area field.
Specific feelings (e.g., "I just feel so much shame.") : This is a text area field.

Specific behaviors (e.g., "When I waste time all day long.") : This is a text area field.
Specific themes (e.g., patterns in relationships or self-concept) : This is a text area field.
What are the "indirect drivers" that lead me to feel suicidal? : This is a label
* Indirect drivers: Underlying factors that contribute, but do not necessarily lead to acute suicidal ideation,

feelings, and behaviors (e.g., homelessness, depression, substance abuse, PTSD, isolation) : This is a text area field.

iii. Suicidal Conceptualization: This is a label.
Suicide as an Option: This is a Text box.

Describe bridges and barriers to going to the next level: This is a text area.

Direct Drivers (transpose information here): This is a text area.

Describe bridges and barriers to going to the next level: This is a text area.

Indirect Drivers (transpose information here): This is a text area.

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From David Jobes, Managing Suicidal Risk: A Collaborative Approach, Second Edition © 2016 by The Guilford Press. www.guilford.com : This is a Label.

Author: Rakesh Naganagoda

47.Core Bugs # 127015: Unable to delete cosigner form the list from the signed Documents.

Release Type: Fix **| Priority:** Medium

Prerequisites: In the 'Document Codes Detail' screen, the 'Requires Signature' option is set as 'NO' for the selected document by following the below **path**:

Login to Smart Care application -- Administration -- 'Document Codes' screen -- Select required Document -- 'Document Codes Detail' Screen -- Set 'Requires Signature' option to 'NO'.

Navigation Path: Login to Smart Care application -- Client -- Choose any Document -- Add the Cosigner -- Complete the document -- Remove the Cosigner added by clicking on the X mark next to cosigner name.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. After signing the Document, the user was unable to delete the cosigner from the list by clicking on the 'X' mark next to the co-signer name.

With this release, the above-mentioned issue has been resolved. Now, after signing the Document, the user is able to delete the cosigner from the list by clicking on the 'X' mark next to the cosigner name**.**

Author: Veena Santosh

48.Core Bugs # 127034: DSM 5: The selected data from the grid for the document is getting cleared when user tried to click on any fields.

Release Type: Fix **|** **Priority:** Medium

Prerequisite: Some diagnosis codes are added in the 'Diagnosis List'.

Navigation Path: Client Search - Client - Diagnosis Document - Enter the code and add the data - Click on 'Insert' button - Diagnosis is added to the List - Select the radio button in the list - data is displayed in the fields - click on any field present - data should not be cleared.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Diagnosis' document, the selected data from the 'Diagnosis List' was getting cleared when the user clicked on any fields.

With this release, the above-mentioned issue has been resolved. Now, the selected data from the 'Diagnosis List' is retained when the user clicks on any fields.

Author: Harika Rajendran

49.Core Bugs # 126572: The 'Care Plan' & 'Care Plan Review' Page is not aligned properly.

Release Type: Fix **|** **Priority:** High

Navigation Path 1: 'Client' Search - Select a Client - Go to 'Care Plan Review'.

Navigation Path 2: 'Client' search – select a Client – Go to 'Care Plan'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Care Plan' & 'Care Plan Review' Page were not aligned properly.

With this release, the above-mentioned issue has been fixed. Now, the Care Plan & Care Plan Review Pages are aligned properly.

Author: Savitha Siddaraju

50.Core Bugs # 127086: Assessment: The 'LOCUS Result Description' field is displayed as blank when the 'LOCUS Result' score is 255 in the Summary tab.

Release Type: Fix **|** **Priority:** Medium

Prerequisite: Select any checkbox from a few sub tabs before navigating to the 'Summary' subtab under 'Locus' tab.

Navigation Path: Client -- 'Assessment' – 'Initial' tab – select 'Initial' radio button and 'MH' checkbox - open 'Locus' tab – Sub tabs will display – open 'Summary' tab -- 'LOCUS Result Description' field.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Summary tab of Assessment document, the 'LOCUS Result Description' field was displayed as blank for the 'LOCUS Result' score of 255.

With this release, the above-mentioned issue has been resolved. Now, in 'Summary' tab of Assessment document, when the 'LOCUS Result' score is 255, then 'LOCUS Result Description' field will display "Abnormal Termination Error Due to invalid values" based on newly inserted value in existing Global Code category "LOCUSLEVEL".

Author: Harika Rajendran

51.Core Bugs # 127216: Goals or Objectives are not displayed in the Care Plan PDF.

Release Type: Fix **|** **Priority:** High

Navigation Path: 'Client' -- 'Care Plan' document – enter required details and Goals/Objectives – click on Save/Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Goals/Objectives were not displayed in the Care Plan document PDF.

With this release, the above-mentioned issue has been resolved. Now, all the added Goals/Objectives are displayed in the Care Plan document PDF.

Author: Akshay Vishwanath

52.Core Bugs # 126899: Diagnosis Document: Error is displayed while signing the Diagnosis document.

Release Type: Fix | **Priority:** Medium

Prerequisite: Set the Configuration key 'REQUIREDIAGNOSISCONDITIONVALIDATION' as 'Yes'.

Navigation Path: 'Client' Search – Select a client – Go Search – 'Diagnosis' – Create a new document – Fill the required fields – 'Validate' – 'Sign'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When an additional diagnosis code was not present in the 'Diagnosis document' and when the user tried to validate the document, the following incorrect validation message was displayed instead of displaying 'Additional Codes required for ICD10Code'.

Validation Message: '' + ErrorMessage + ''

With this release, the above-mentioned issue has been resolved. Now, the user will no longer encounter the above validation error message. When an additional diagnosis code is not present in the document and when the user tries to validate the document, the following validation message will be displayed.

Validation Message: 'Additional Codes required for ICD10Code'

Author: Savitha Siddaraju

53.Core Bugs # 127194: Registration document: incorrect logo is displaying.

Priority: High **| Release Type:** Fix

Navigation Path: Select a client – Go Search – Registration document – New - Enter all the details – Save/Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. On signing the Registration document, an incorrect logo was displayed in Registration document PDF.

With this release, the above-mentioned issue has been resolved. Now, on signing the registration document, the correct logo is displaying in the PDF.

Author: Sunil Belagali

54.Core Bugs # 127130: Documents List page width issue.

Release Type: Fix | **Priority:** Medium

Navigation Path: 'Client' search – 'Documents' – Documents list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Documents' List Page wasn't adjusting to the screen width when the user zoomed out or resized it.

With this release, the above-mentioned issue has been resolved. The 'Documents' List Page is now able to adjust to the screen width when the user zoomed out or resized it.

Dynamic Forms(DFA)

Reference No	Task No	Description
55	Core Bugs # 126898	DFA Document: Client Signature Header Signing as Clinician.
56	Core Bugs # 127129	DFA Documents or Service/Notes: 'Report displaying "undefined" Data' and 'Calendar icons in the DFA Forms are not loading correctly'.
57	Core Bugs # 127243	The inserted validation for the required field in DFA service note is not displayed in 'Document Validations'.

Author: Sunil Belagali

55.Core Bugs # 126898: DFA Document: Client Signature Header Signing as Clinician.

Release Type: Fix **|** **Priority:** High

Prerequisite:

A DFA document exists with Required Signature, and the field 'AllowPatientPortalAsAuthor' as 'Yes' in the respective 'Document Codes' detail page.

Navigation Path: Login to Patient Portal - Clinical Documents - Select DFA Document – Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Whenever the Client logged in as a Patient Portal user and signed any assigned DFA document, the Client signature header was signed as "Clinician" instead of 'Client' in the PDF.

With this release, the above-mentioned issue has been resolved. Now, the Client signature header is signed correctly as 'Client' in the PDF for DFA documents.

Author: Sunil Belagali

56.Core Bugs # 127129: DFA Documents or Service/Notes: 'Report displaying "undefined" Data' and 'Calendar icons in the DFA Forms are not loading correctly'.

Release Type: Fix **|** **Priority:** Urgent

Navigation Path 1: Login to 'SmartCare application' – 'Client' search – Any 'DFA Documents or Service/Notes' – Fill all the details – 'Sign'.

Navigation Path 2: Login to 'SmartCare application' – 'Client' search – Any 'DFA Documents or Service/Notes' – 'Calendar Image' in the Forms.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The following issues were observed:

- Whenever a user signed any 'DFA Documents or Service/Notes', the data was not displayed correctly in the PDF. Instead, the reports were showing "undefined" in place of the actual data.
- 'Calendar' icons in the 'DFA Forms' were not loading correctly.

With this release, the above-mentioned issues have been fixed. The PDF will no longer display "Undefined" and the data will display correctly in the PDF. Also, the 'Calendar image' in the DFA Forms is loading correctly now.

Author: Kiran Tigarimath

57.Core Bugs # 127243: The inserted validation for the required field in DFA service note is not displayed in 'Document Validations'.

Release Type: Fix **|** **Priority:** Urgent

Navigation Path 1: Client' - 'Services/Notes' – select Psychiatric Note -- 'Note' Tab - 'Any DFA' Tab.

Navigation Path 2: Administration -- 'Document Validations' -- 'Document Validations' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to insert a validation for the required field in any DFA service notes using CTRl+ALT+V keys, the inserted field validation was not displayed in the 'Document Validations' list page.

With this release, the above-mentioned issue has been resolved. Now, when the user inserts a validation using CTRl+ALT+V keys for a required field in any DFA service note, the inserted validation will display in the 'Document Validations' list page.

Eligibility – Mapping

Reference No	Task No	Description
58	Core Bugs # 126365	Eligibility Update Procedure Does Not Update Records correctly.

Author: Roopa Hemanna

58.Core Bugs # 126365: Eligibility Update Procedure Does Not Update Records correctly.

Release Type: Fix **|** **Priority:** High

Navigation Path: N/A

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the column 'PlanCoverageDescription' was added in the 'ElectronicEligibilityResponseBenefitAttributeToCoveragePlanMapping' table with the new version of the update procedure, the given logic used the exact match logic for the eligibility matching. But it should check for an approximate match (like) for this field.

With this release, the above-mentioned issue has been resolved. Now, the system will accept soft (approximate or Like) matches. The plan description returned in the response will look for a soft match in the mapping table.

Group MAR

Reference No	Task No	Description
59	Core Bugs # 127144	Group MAR: The user is able to input characters into the 'Dose' field instead of decimals.

Author: Madhu Basavaraju

59.Core Bugs # 127144: Group MAR: The user is able to input characters into the 'Dose' field instead of decimals.

Release Type: Fix | **Priority:** High

Prerequisite: A Client Order is signed.

Navigation Path: Go Search – Group MAR (My Office) – 'Group MAR' screen – Click on the 'Pill' icon (for the Client Order signed (refer to the Prerequisite) – Click on 'Given' hyperlink – 'MAR Details' editing popup – 'Edit'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was able to input characters into the 'Dose' textbox field instead of decimal values in the 'Client/Group MAR Details' editing popup.

With this release, the above-mentioned issue has been resolved. Now, the 'Dose' textbox field will only accept decimal values in the Client/Group MAR Details editing popup.

Group Service

Reference No	Task No	Description
60	Core Bugs # 127200	Group Service Detail screen – The Client names are not lined up properly in the Client Note tab.
61	Core Bugs # 127007	Unable To Move Group Documents To A New Service.
62	Core Bugs # 127097	Group Services – Duplicate services being created in recurring groups.

Author: Suganya Sivakumar

60.Core Bugs # 127200: Group Service Detail screen – The Client names are not lined up properly in the Client Note tab.

Release Type: Fix | **Priority:** High

Navigation Path: My Office --- Managing Groups --- Group List page --- Click on New Icon --- Group Detail Page ---- Enter all the Required fields ---- Click on Save --- Navigate to Schedule tab --- Click on New Group Service button --- Group Service Clients popup --- Select Date of Service and Clients --- Click on Select button -

-- Navigate to Group Service Detail Screen --- Enter all the required fields --- Click on Sign Button --- Sign the Group Services.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Group Service Detail screen, the Client Names were not lined up adequately and the names were long, they were overlapping with each other.

With this release, the above-mentioned issue has been fixed. Now, in the Group Service detail screen, the Client Names do not overlap with each other, and it is aligned correctly.

Author: Aishwarya Bommaklar

61.Core Bugs # 127007: Unable To Move Group Documents To A New Service.

Release Type: Fix | Priority: Medium

Navigation Path 1: 'My Office' – 'Groups' – Click on 'Group Name' hyperlink – Click on 'Schedule' tab - Click on 'New Group Service' button – Enter 'Date of Service' – Click on 'Select' button – Enter all the required fields – Select Procedure Code' where Time In/Time Out is required - Enter 'Time In/Time Out' - Click on 'Save' icon – Click on 'Note' tab – Enter 'Group Note' – Click on 'Update My Client Note' button – Click on 'Client Note' tab – Enter 'Client Note' – Click on 'Sign My Notes'.

Navigation Path 2: 'My Office' – 'Groups' – Click on 'Group Name' hyperlink – Click on 'Schedule' tab - Click on 'New Group Service' button – Enter a different 'Date of Service' than the above Service, Click on 'Select' button – Enter all the required fields – Select Procedure Code where Time In/Time Out is required - Enter different 'Time In/Time Out' than the above Service - Click on 'Save' icon – Click on 'Move Documents' Icon – Select the above 'Group Service' – Click on Select button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to move group documents to the 'New Group Service,' the Time In/Time Out information was not transferred from the 'Old Service' to the 'New Service.'

With this release, the above-mentioned issue has been fixed. Now, the user can move group documents to a new group service, and all the information, including Time In, Time Out, and Group Note content, will be transferred successfully.

Author: Suganya Sivakumar

62.Core Bugs # 127097: Group Services – Duplicate services being created in recurring groups.

Release Type: Fix | **Priority:** Medium

Prerequisite:

1. A Group Service is created with more than one Staff.

Navigation Path 1: 'My Office' --- 'Managing Groups' --- 'Group List page' --- Click on 'New' icon --- 'Group Detail Page' ---- Enter all the Required fields ---- Click on 'Save' Icon --- Navigate to 'Schedule' tab --- Click on 'New Group Service' button --- 'Group Service Clients' popup --- Select 'Date of Service and Clients --- Click on 'Select' button --- Navigate to 'Group Service Detail Screen' --- Enter all the required fields --- Click on 'Sign' button --- Sign the 'Group Services'.

Navigation Path 2: In the 'Service' Tab --- Click on the 'Make Recurring' Icon --- 'Recurring Group Services' popup --- In the 'Date Range' section --- Select the 'Start and the End Date' --- In the 'Recurrence Pattern' section --- select the appropriate values --- Click on 'Create Immediately' checkbox --- Click on 'OK' button.

Functionality 'Before' and 'After' release:

Note: This will work for the customer environments who are using custom logic.

Before this release, here was the behavior. When a recurring group was created from an already signed group, all the future scheduled groups from that recurrence had existing services for all the Co-Staff in the group. However, when a user signed in, it created a second service for all of the co-staff.

With this release, the above-mentioned issue has been fixed. Now, it will not create a second service for all of the co-staff, when a recurring group is created from an already signed group.

Groups

Reference No	Task No	Description
63	Core Bugs # 127287	Group is not displayed in the Groups list page when there is an inactive client in the Group.

Author: Aishwarya Bommaklar

63.Core Bugs # 127287: Group is not displayed in the Groups list page when there is an inactive client in the Group.

Release Type: Fix **|** **Priority:** High

Prerequisite:

1. Inactive Client with no charge is present in the Group.
2. A Configuration key 'ClientAccessRuleIncludeAllInactiveClients' is set to 'Y'.

Navigation Path: My Office -- 'Groups' -- 'Groups' list page -- Search for the Group.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When any one of the Clients was inactive in the Group and had no charge, that Group was not displayed in the Groups list page.

With this release, the above-mentioned issue has been resolved. Now, all the Groups are displayed in the Groups list page even if there are inactive Clients present in that Group.

Immunization

Reference No	Task No	Description
64	Core Bugs # 127107	sending an immunization history details in the form of HL7 message for an individual client to the default configured vendor and location.

Author: Munish Sood

64.Core Bugs # 127107: sending an immunization history details in the form of HL7 message for an individual client to the default configured vendor and location.

Release Type: Fix **|** **Priority:** Medium

Navigation Path 1: 'Client' - Immunizations - New - Immunizations Details - Fill all details and select 'Location where immunization is administered' – Save.

Navigation Path 2: 'Client' - 'Immunization Transmission Log' list page - 'Click to Send Client Immunizations' Icon on Toolbar - Select Vaccine Name on Client Immunization pop up - Click on 'Send'.

Navigation Path 3: 'Administration' - 'Messages Interface' - 'Messages Interface' list page - 'Message Interface Detail' Detail page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Once the HL7 message (VXU) was generated, and it was sending immunization history details in the form of HL7 message for an individual client to the default configured vendor and location.

With this release, the above-mentioned issue has been resolved. Now, the HL7 Message is generating and sending immunization history details in the form of HL7 message for an individual client to any configured vendor which is mapped with selected location in 'Location where immunization administered' field value under client Immunizations Details screen.

Note: The configuration for the location and vendor details mapping for "'Location where immunization administered' field is in HL7CPVendorLocations table.

Interface

Reference No	Task No	Description
65	Core Bugs # 127119	The Health Data Report is using Summary of Care Version format to generate CCD XML instead of USCDI Summary of Care version.
66	Core Bugs # 127072	Health Data Report Detail Screen - error on Save.

Author: Munish Sood

65.Core Bugs # 127119: The Health Data Report is using Summary of Care Version format to generate CCD XML instead of USCDI Summary of Care version.

Release Type: Fix **|** **Priority:** On Fire

Navigation Path: My Office -- Health Data Report – 'Health Data Report' list page – 'Health Data Report Detail' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Health Data Report Detail screen, when the user tried to create a CCD XML, the Health Data Report was using Summary of Care Version format to generate CCD XML.

With this release, the above-mentioned issue has been resolved. Now, the Health Data Report is using USCDI Summary of Care version format to generate CCD XML in the Health Data Report Detail screen.

Author: Munish Sood

66.Core Bugs # 127072: Health Data Report Detail Screen - error on Save.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: Health Data Report (My Office) - Health Data Report list page - New - Health Data Report Detail.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the health data report detail screen, when the user entered all the data and clicked on save, the below error message was displayed and CCD XML was not creating.

Error:
50000*****50000*****50000*****50000*****245*****Conversion failed when converting the varchar value '88.00' to data type int.*****ssp_RDLClinicalSummarySmoking*****73*****16*****1*****ssp_RDLClinicalSummarySmoking*****133*****16*****1*****ssp_GetSocialHistoryXMLString*****177*****16*****1*****ssp_GenerateCCDWithSelectedCom*****758*****16*****1*****ssp_GenerateCCDForHealthDataEx*****55*****16*****1
Uncommittable transaction is detected at the end of the batch. The transaction is rolled back.

With this release, the above mentioned issue has been resolved. Now, the CCD XML contents is created without any error message, when the user enters all the data and saves in Health Data Report Detail screen.

Ledger Entry

Reference No	Task No	Description
67	Core Bugs # 127186	Issues in Ledger Entries screen.

Author: Namratha Nagaraj

67.Core Bugs # 127186: Issues in Ledger Entries screen.

Release Type: Fix **|** **Priority:** Medium

Prerequisite:

1. More than one coverage plan exists for a Client (Plan1 with COB order 1, Plan2 with COB order 2).
2. Service is completed for the Client.
3. Change the COB order in the Coverage Plans screen (Plan1 with COB order 2, Plan2 with COB order 1).
4. Execute Nightly billing job.

Navigation Path: Select the Client for which Service is completed – Go Search – Services – Click on the Charge hyperlink – Ledger Entries.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the COB order was changed and nightly billing job was executed, the below issues was observed in the Payers section of Ledger Entries screen:

1. The plans were not displayed as per the changed COB order.
2. The Total Current Balance was displayed incorrectly.

With this release, the above-mentioned issue has been resolved. Now, when the COB order is changed in Coverage screen and nightly billing job is executed, the below resolution is done in the Payers section of the Ledger Entries screen:

1. The plans are displaying as per the changed COB.
2. The Total Current Balance is displaying correctly.

Manage Available Locations

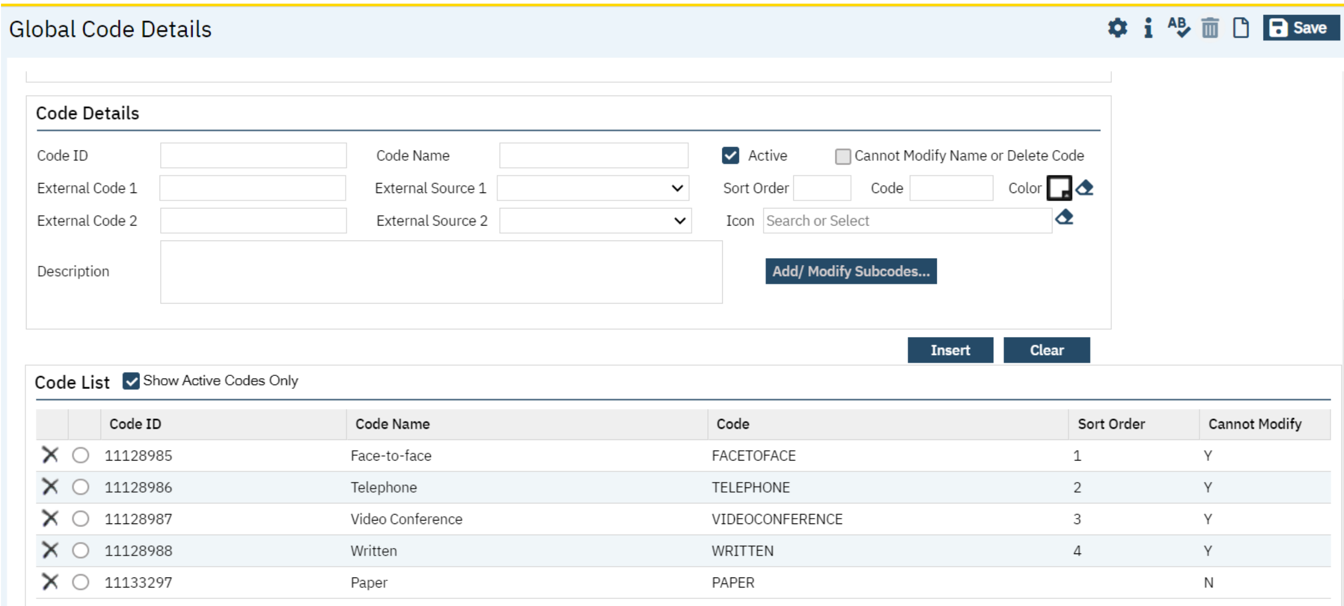
Reference No	Task No	Description
68	EII # 126598	Location Details: Mapping Mode of Delivery tab is added.

Author: Lakshmi Kumarappan

68.EII # 126598: Location Details: Mapping Mode of Delivery tab is added.

Release Type: Change **|** **Priority:** On Fire

Prerequisite: Global Codes set up by using the path: 'Administration' -- 'Global Codes' -- 'Global Codes' list page -- Select the 'MODEOFDELIVERY' value in the 'All Categories' dropdown field -- Click on 'Apply Filter' button -- Click on 'MODEOFDELIVERY' hyperlink -- 'Global Code Detail' page—Note down Code Name values associated with Global code Id (for MODEOFDELIVERY).

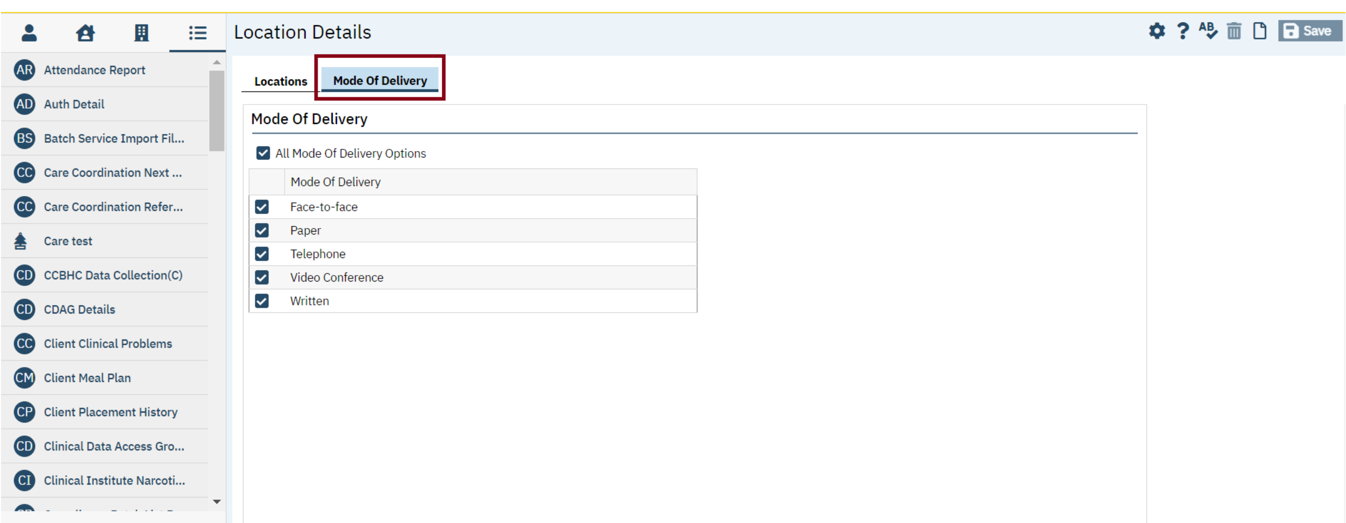


Navigation Path: 'GO' Search -- 'Location' Screen -- 'New' icon -- 'Location Details' screen.

Functionality 'Before' and 'After' release:

Purpose: This is implemented in order to prevent documenting the Services with Mode Of Delivery and Locations, Procedure choices that are invalid for the Service Procedure being recorded (Refer EII #126599 also).

With this release, a new tab 'Mode of Delivery' is added in the 'Location Details' screen. This tab contains a checkbox 'All Mode of Delivery Options' with multi-select list checkboxes under Mode of Delivery section. The multi-select list checkboxes are initialized from the Global Code Category "MODEOFDELIVERY" and 'All Mode of Delivery Options' checkbox will be selected as default.



Data Model changes:

- **LocationModeOfDeliveries** table is added.
- **'AllModeofDelivery'** column is added to Locations table.

Manage Staff Permissions

Reference No	Task No	Description
69	Core Bugs # 126984	Getting an Error message while clicking on the Client Viewing icon.

Author: Rakesh Naganagoda

69.Core Bugs # 126984: Getting an Error message while clicking on the Client Viewing icon.

Release Type: Fix **|** **Priority:** Urgent

Navigation Path: Client – open any Document – Click on the 'Client Viewing' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Document, when the user clicked on the Client Viewing icon, the below mentioned red error message was displayed and the same error was displayed when navigating to other screens too.

Error Message: *You are not authorized to view the screen.*

With this release, the above-mentioned issues have been resolved. Now, a new permission option 'Client Viewing PDF' was added in the Roles/Permissions tab of Staff Details screen. By denying that option the 'Client Viewing' icon won't be displayed for the user after signing the document. Also, the user can view the document by clicking the Client Viewing icon in a document, when permissioned.

Methadone

Reference No	Task No	Description
~~70~~	~~EII # 124724~~	~~MAT: Implementing a Conversion Logic for ml to display in mg unit.~~
~~71~~	~~EII # 124643~~	~~Added 'Destroy' option in 'Reason' dropdown field in Medication Inventory Transaction Detail Screen.~~
~~72~~	~~EII # 125449~~	~~Changes are implemented to generate recorded services based on the MAT Medication Dispense.~~
~~73~~	~~EII # 124361~~	~~Implementing a new 'MAT Lighthouse Report'~~
~~74~~	~~EII # 1787~~	~~Methadone API integration in SmartCare.~~

~~**Author:** Madhu Basavaraj~~

~~70.EII # 124724: MAT: Implementing a Conversion Logic for ml to display in mg unit.~~

~~**Release Type:** Change **|** **Priority:** Urgent~~

~~**Navigation Path 1:** 'Administration' -- 'Orders' -- 'Orders' list page -- New -- 'Order Details' screen -- Select 'Medication' Order Type -- Enter the required fields -- Medication Assisted Treatment section -- Select Medication Assisted Treatment (MAT) & Machine Connection Required &Take Home Allowed 'Options' as Yes -- Save.~~

~~**Navigation Path 2:** My Office -- 'Medication/Lot/Bottle' list page -- New -- 'Medication/Lot/Bottle Details' screen - - Enter the required fields -- Insert -- Save.~~

~~**Navigation Path 3:** My Office -- 'MAT Dispenser' list page -- New -- 'MAT Dispenser Detail' screen -- 'General' tab -- Enter the required fields -- Insert -- Save.~~

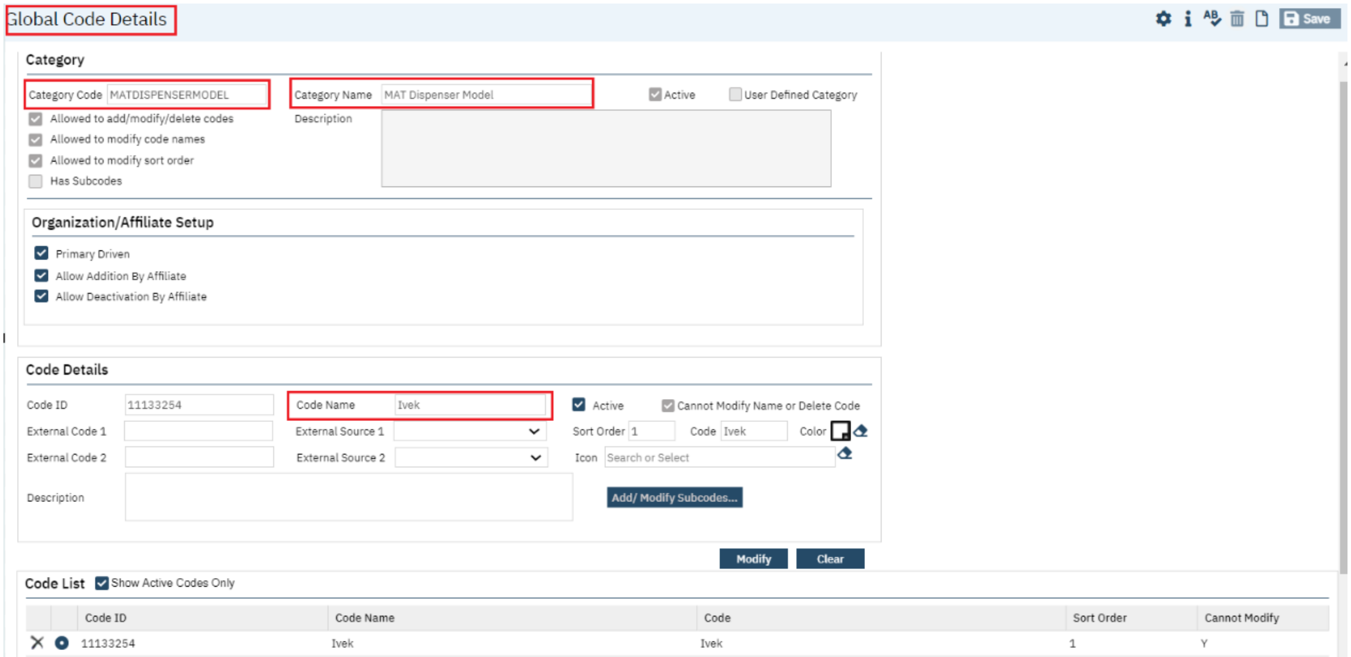
~~**Navigation Path 4:** 'Client' -- 'Client Orders' -- 'Client Orders' list page -- New -- 'Client Order details' screen -- Select the Order created in Navigation Path 1 -- Enter the required fields -- Insert -- Save and sign.~~

~~**Navigation Path 5:** 'My Office' -- 'MAT Management' list page -- Click on 'Dispense' icon for the 'Client' Medication to be dispensed -- 'MAT Management Details' screen -- Sign -- Click on 'Take Home/Dispense' Icon.~~

~~**Navigation Path 6:** My Office -- 'Medication Inventory Transaction' list page -- New -- Medication Inventory Transaction Detail' screen.~~

~~**Navigation Path 7:** 'Client' -- 'MAT Exception Document' flag.~~

~~**Navigation Path 8:** 'Administration'-- 'Global Codes' -- 'Global Codes' list page -- Select the 'MATDispenserModel' value in the 'All Categories' dropdown field -- Click on 'Apply Filter' button -- Click on **'MATDISPENSERMODEL'** hyperlink -- 'Global Code Detail' page.~~

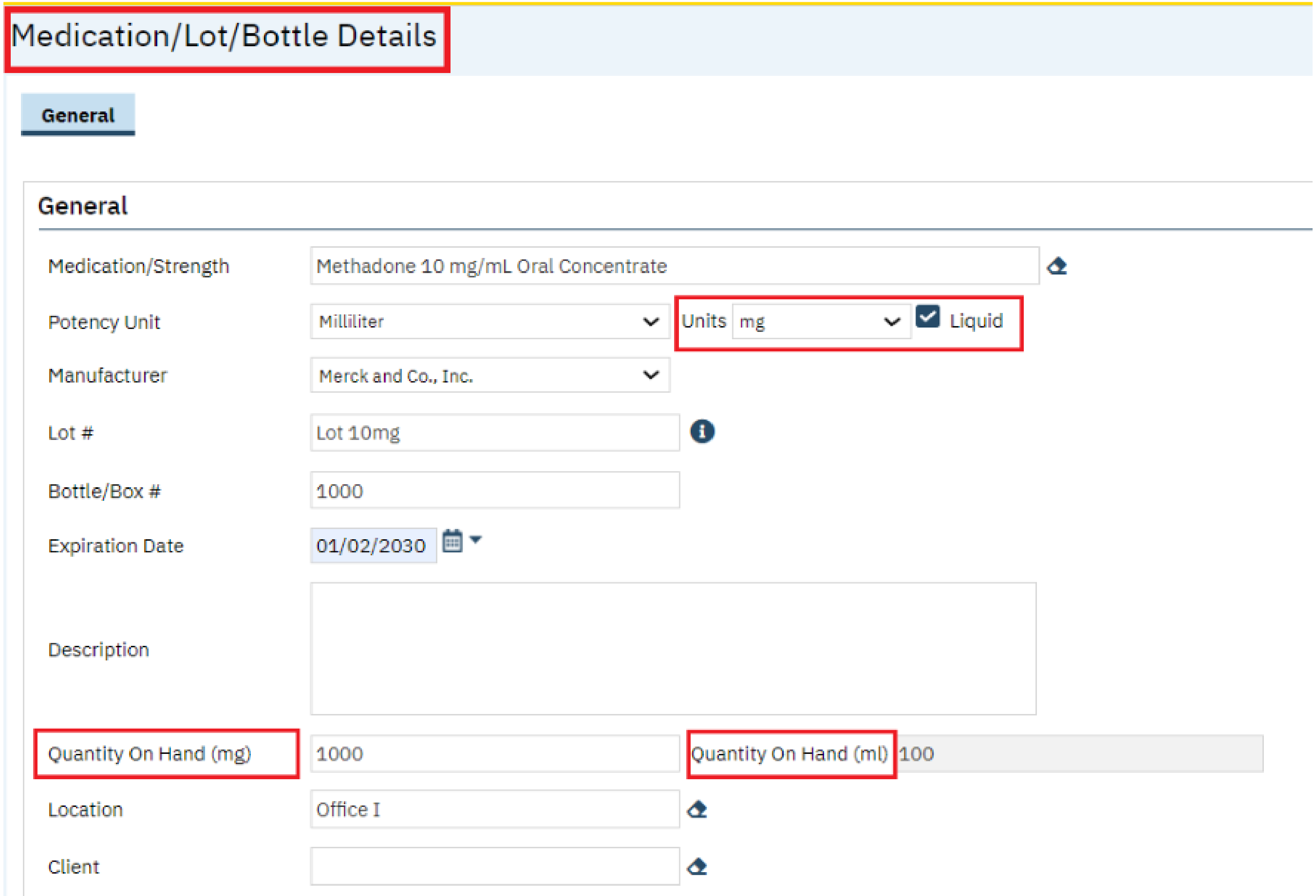


~~**Functionality 'Before' and 'After' release:**~~

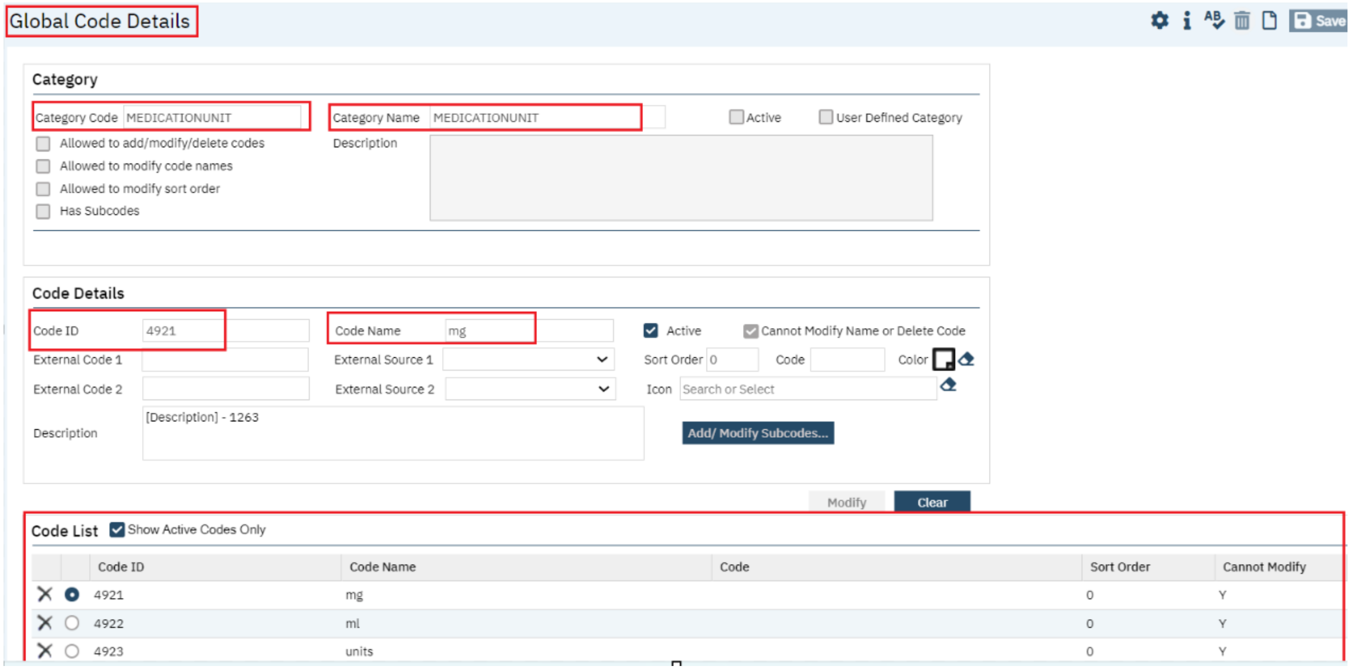
~~**Purpose:** This is for the MAT module to implement the Dosage change and conversion from ml to mg logic as per federal requirements.~~

~~With this release, the below implementation has been done.~~

1. ~~In **'Medication/Lot/Bottle Details' screen**, under 'General' tab, the below mentioned fields have been implemented.~~



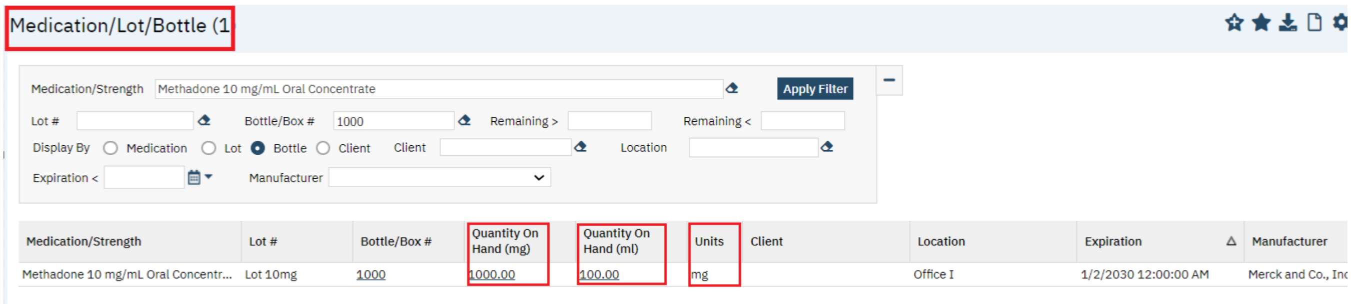
- ~~**'Units'**: A dropdown field.~~
    - ~~This is a required field, when there is no value entered the below validation will be displayed:~~
    - ~~Validation message: 'Please enter values for required fields.~~
    - ~~Dropdown values (mg, ml) will be pulled from Global code 'MEDICATIONUNIT'.~~



- ~~'Units' (mg, ml) field will be initialized after choosing the Medication same as 'Client orders' Units, such as: for Liquid medication, it displays ml, mg and for Tablets it displays mg, each.~~
- ~~This field will be disabled on Save.~~
- ~~When Unit is selected as ml, 'Quantity On Hand (mg)' field will be disabled.~~
- ~~When Unit is selected as mg, 'Quantity On Hand (ml)' field will be disabled.~~
- ~~When any other Unit is selected apart from ml tab out, 'Quantity On Hand (ml)' field will be disabled and reset to 0.~~

- ~~**'Liquid' :** checkbox~~
  - ~~This field will be displayed only when the 'Unit' type is selected as "mg".~~
  - ~~This field will be disabled on Save.~~
- ~~**Quantity On Hand (ml):** Textbox field.~~
  - ~~It's a required field if 'Unit' is selected as ml and there is no value entered, the below validation will be displayed:~~
  - ~~Validation message: 'Inventory Detail - Quantity On Hand (ml) is required'~~
  - ~~When Unit is selected as 'ml' and a value is entered, on tab out, the system auto calculates the value Quantity On Hand (mg).~~
  - ~~This field will be disabled on Save.~~
- ~~**Quantity On Hand (mg):** Textbox field.~~
  - ~~It's a required field, if any other 'Unit' is selected as mg and when there is no value entered, the below validation will be displayed:~~
  - ~~Validation message: 'Inventory Detail - Quantity On Hand (mg) is required'~~
  - ~~When this value is entered and on tab out,~~
    - ~~If the "Liquid" Checkbox is checked, the system auto calculates and displays the Quantity On Hand in ml.~~
    - ~~If "Liquid" Checkbox is unchecked, the system resets the Quantity On Hand in ml to 0.~~
  - ~~This field will be disabled on Save.~~

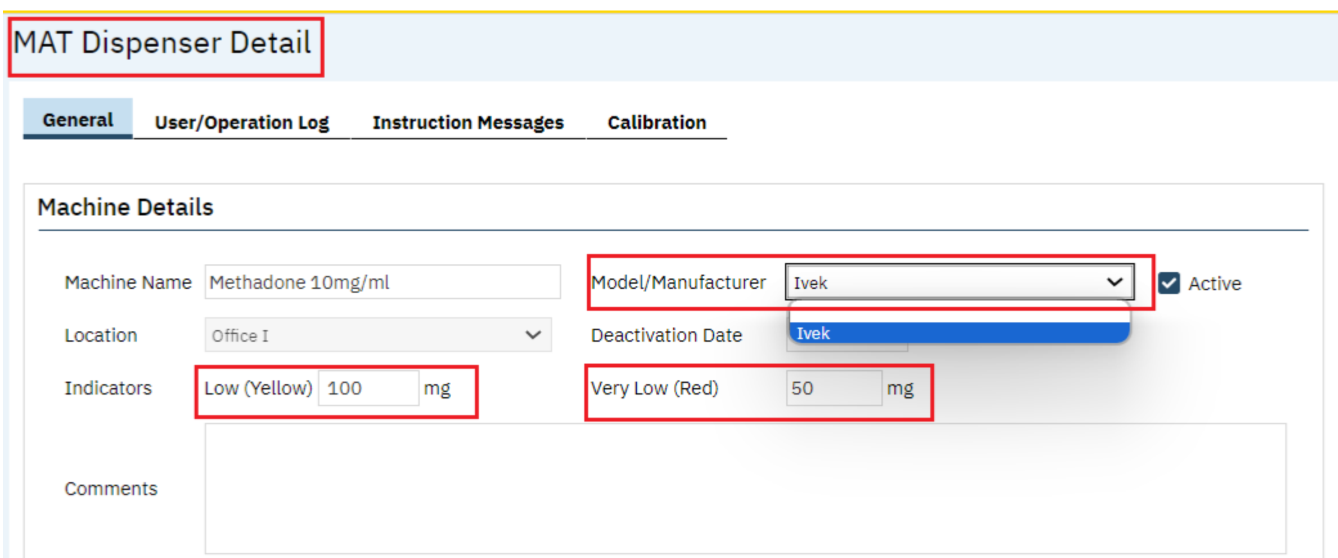
2. ~~In the **'Medication/Lot/Bottle' list page,** under 'Grid' section, the below mentioned fields have been implemented.~~



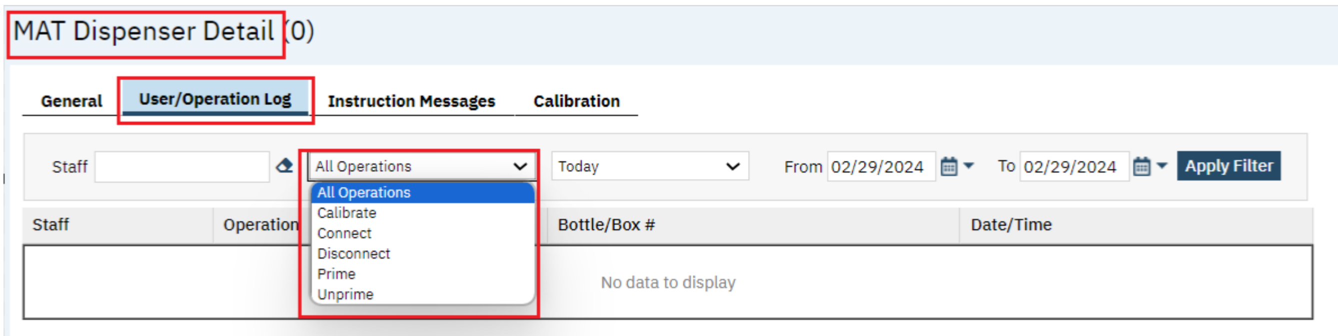
- ~~**Quantity On Hand (mg):** column – Initializes the Quantity On Hand (mg) value entered in the 'Medication/Lot/Bottle Details'.~~
- ~~**Quantity On Hand (ml):** column - Initializes the Quantity On Hand (ml) value, entered in the 'Medication/Lot/Bottle Details'.~~
- ~~**'Units':** column - Initializes the associated 'Units' entered in the 'Medication/Lot/Bottle Details'.~~

~~3. In the **'MAT Dispenser Detail' screen,** the below mentioned field changes have been implemented.~~

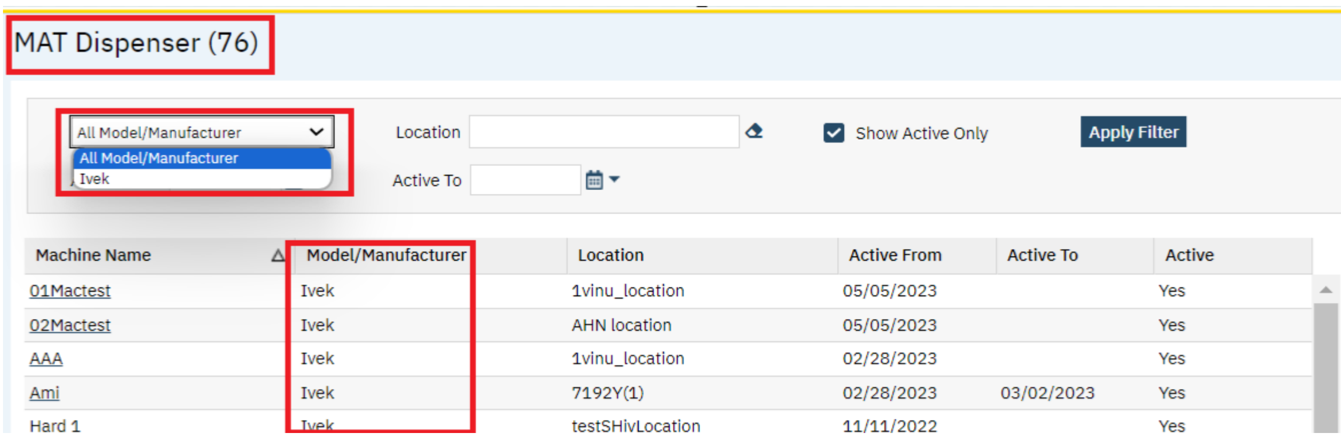
- ~~Under 'General tab, in 'Machine Details' section,~~
  - ~~**'Model/Manufacturer'** - dropdown field: 'Ivek' dropdown value will be displayed which will be initialized from the new 'Global code' category with the name 'MATDispenserModel'.~~
  - ~~**Indicators:** 'Low (Yellow)' and 'Very Low (Red)' Label changed from 'mg/ml' to 'mg'.~~



- ~~In 'User/Operation Log' Tab, the 'Dispense' option has been removed from 'All Operations' Dropdown.~~

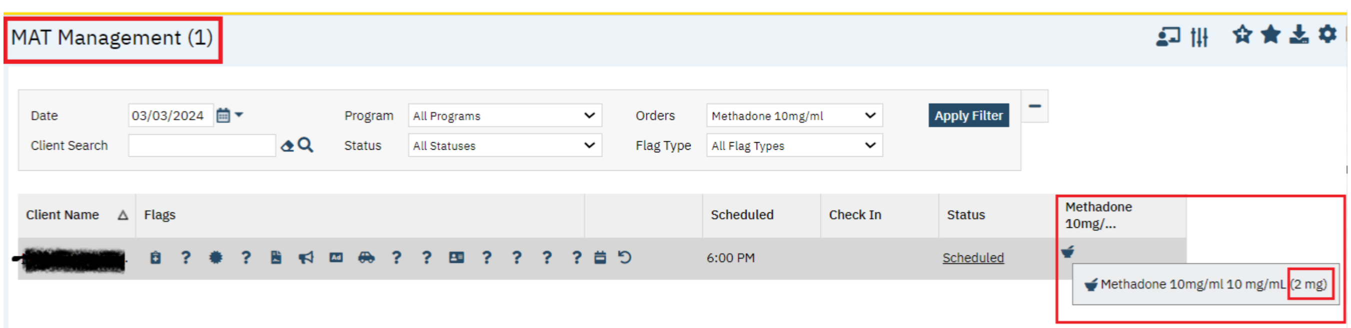


4. ~~In the **'MAT Dispenser' list screen**, under 'Filter' section, for 'All Model/Manufacturer', 'Ivek' dropdown value will be displayed which will be initialized from the new 'Global code' category with the name 'MATDispenserModel'.~~



5. ~~In the **'MAT Management' List screen**, under 'Grid' section, the below mentioned changes have been implemented.~~

- ~~When a user mouse hovers over the 'Dispense' Icon, the Correct Dosage as per the Conversion logic of Medication will be displayed.~~
- ~~Replaced mg/ml to mg for the Liquid medications.~~



- ~~**Conversion logic of Medication:**~~

~~**Note :** These changes are only for the Order type of MAT. Other Orders will follow the Existing functionality.~~

- ~~**Unit: Each**~~
  - ~~If Strength is Numeric, Multipled with Dose.~~
  - ~~If Strength is Non-Numeric, the entered value in Dose is shown as it is.~~
- ~~**Unit: mg**~~
  - ~~Whatever is entered is shown as it is in Dose.~~

~~**Unit: Units**~~

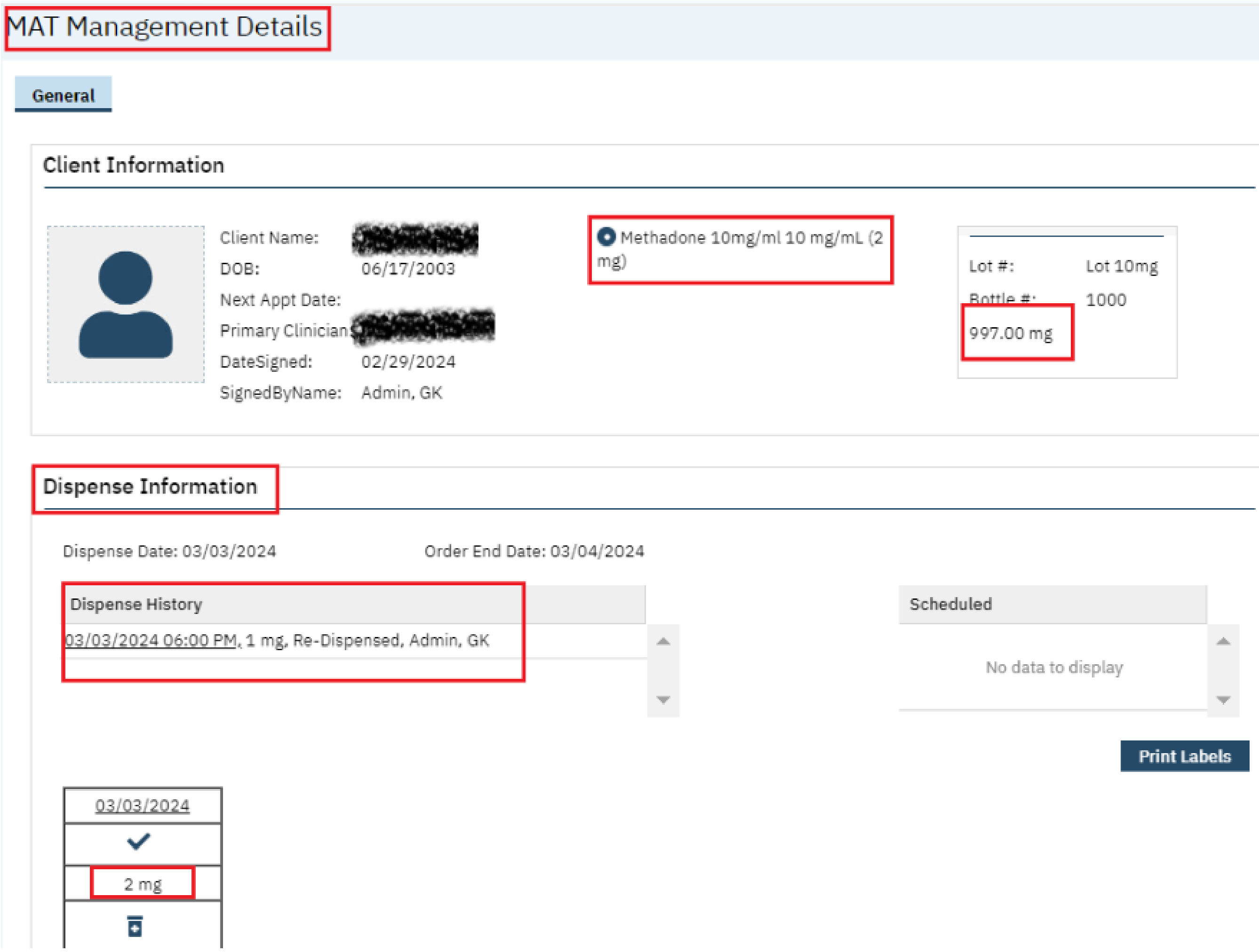
- ~~If Strength is Numeric, Multiplied with Dose.~~
- ~~If Strength is Non-Numeric, the entered value in Dose is shown as it is.~~

~~**Unit**: ml~~

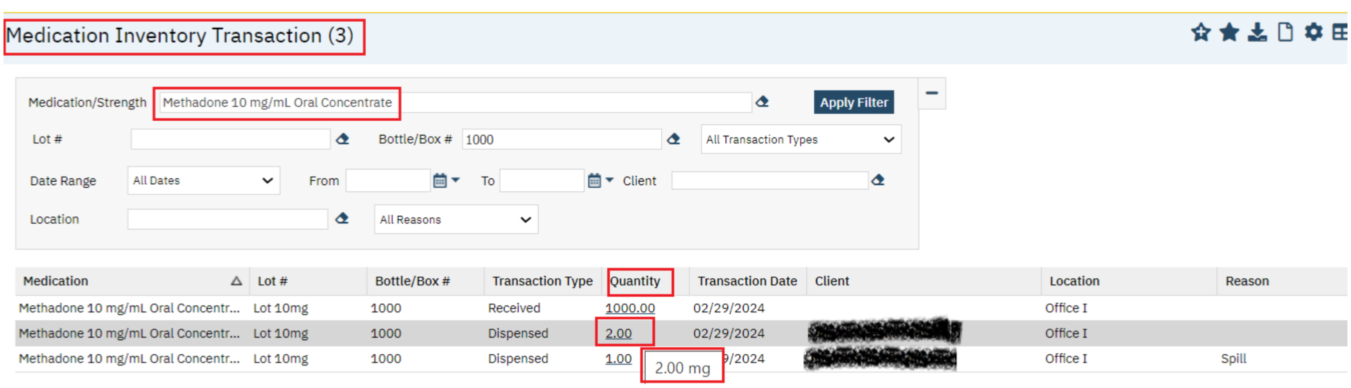
- ~~If Strength is Numeric, convert to mg (based on Strength Conversion formula) Dose (enter value in ml equivalent to mg).~~
- ~~If Strength is Non-numeric, the entered value in Dose is shown as it is.~~

6. ~~In the **'MAT Management Details' screen**, the below mentioned field changes have been implemented.~~

- ~~Under 'Dispense Information' section:~~
  - ~~Dispense Information - Replaced 'mg/ml' to mg for the Liquid medications.~~
  - ~~'Dispense' Field - On Dispense and Re-Dispense, mg value will be deducted from the inventory.~~
  - ~~When the Dosage is updated in the Edit dosage Popup for the respective date, the same dose will be shown in the Scheduled section as well.~~
  - ~~For Take home, the Scheduled Date and Time for Re-dispense will be considered.~~



7. ~~In the **'Medication Inventory Transaction' list page**, when the user mouse hovers over the 'Quantity' hyperlink, ml or mg will indicate based on the Transaction done.~~

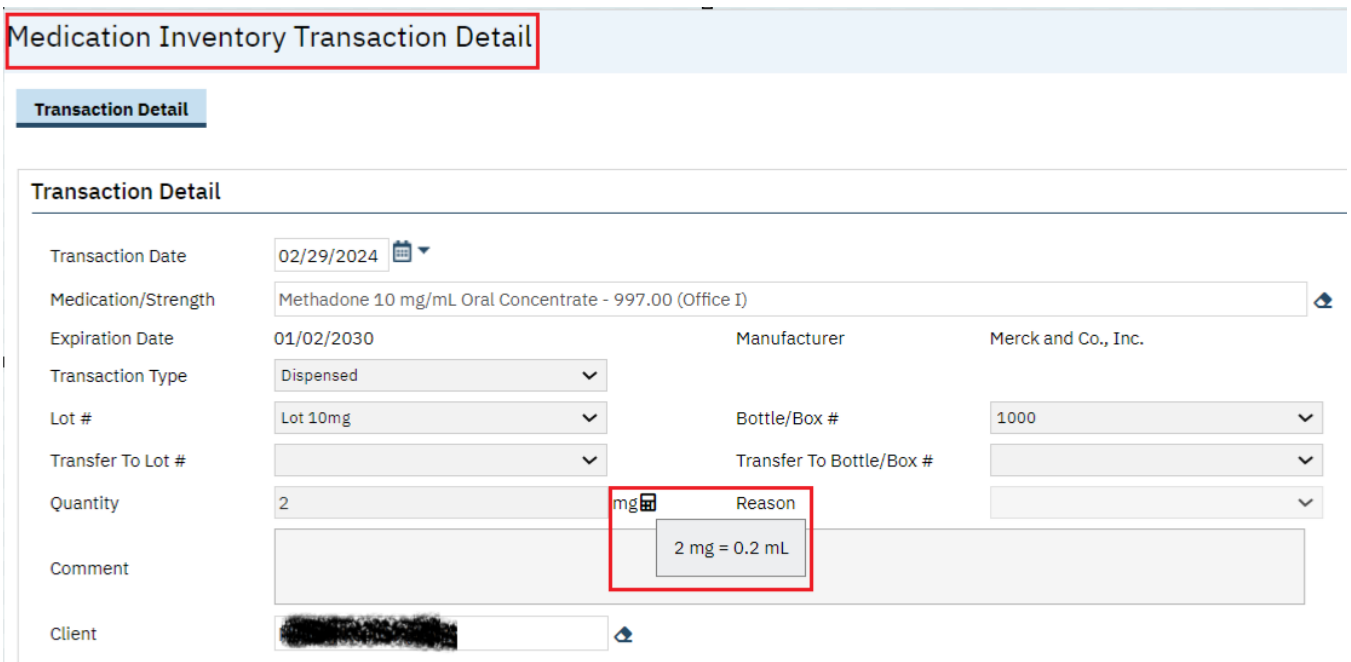


8. ~~In the **'Medication Inventory Transaction Detail' screen,** under 'Transaction Detail' tab and section, below mentioned fields have been implemented.~~

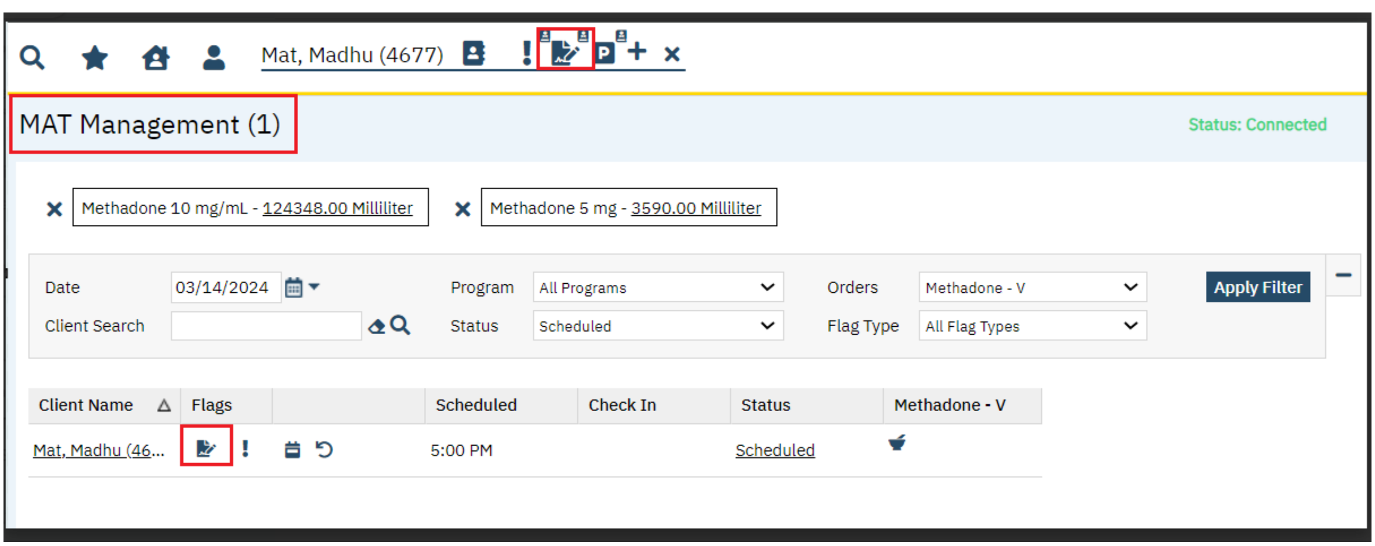
- ~~'Quantity' field~~
- ~~Added a label to specify how the transaction was done whether in mg or ml.~~

- ~~If a new Transaction is entered, this label will auto populate after selecting the Lot # as per the 'Medication/Lot/Bottle' setup.~~
- ~~If it is an existing Transaction, then it will display with the correct label indicating whether the transaction was done in mg or ml.~~

~~Calculator Icon will be displayed with the equivalent ml or mg value, which will be shown only for Liquid Type (Medication marked as Liquid in 'Medication/Lot/Bottle' screen) of Medication or else it will be hidden.~~



9. ~~MAT Exception Document Due Expiration – Flag icon has been changed from~~ ~~to~~ .



~~Data Model Changes:~~

- ~~The columns **'InitialQuantity'**, **'QuantityOnHandML'**, **'Units'**, **'Liquid'** are included in **MedicationInventories** table.~~
- ~~The column **'QuantityML'** is included **in MedicationTransactions** table.~~

~~**Author:** Sithara Ponnath~~

~~71.EII # 124643: MAT: Added 'Destroy' option in 'Reason' dropdown field in Medication Inventory Transaction Detail Screen.~~

~~**Release Type:** Change **| Priority:** Urgent~~

~~**Purpose:** To destroy a stock bottle of medication when a bottle has been contaminated or contains expired medication.~~

~~**Navigation Path 1:** Administration – Global Codes – select 'MEDTRANSACTIONREASON' – Global Code Details.~~

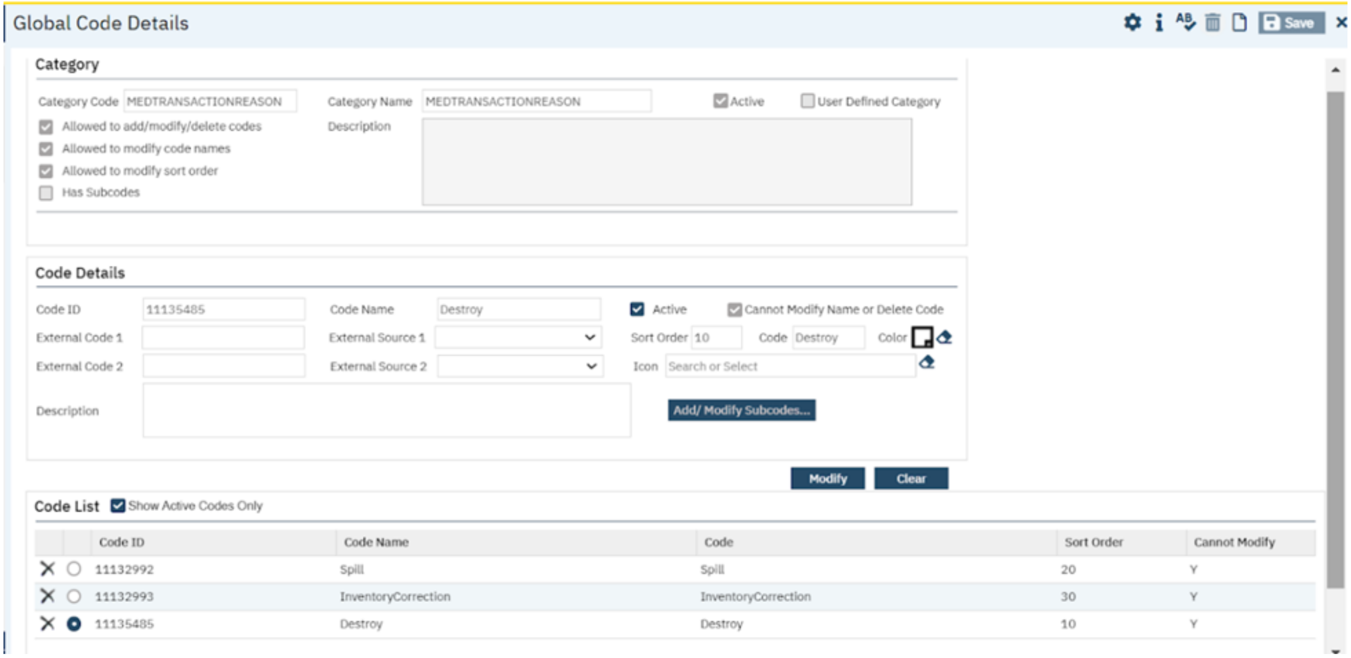
~~**Navigation Path 2:** 'My Office' -- 'Medication Inventory Transaction' -- Click on 'Quantity' hyperlink for respective Medication/Lot #/Bottle/Box # -- Select 'New' icon -- 'Medication Inventory Transaction Detail' Search and select 'Medication/Strength' (Observe Quantity and Location that are listed match the correct bottle) -- Select 'Transaction Type' as 'Adjustment' -- Select value from 'Lot #' dropdown -- Select value from 'Bottle/Box #' dropdown -- Select 'Destroy' from 'Reason' dropdown -- Observe 'Quantity' - Type optional Comment in the 'Comment' textbox -- Click on 'Save' button.~~

~~**Functionality 'Before' and 'After' release:**~~

~~With this release, a new option 'Destroy' is added to the existing MEDTRANSACTIONREASON Global Code and a few changes have been implemented in the 'Medication Inventory Transaction Detail' screen.~~

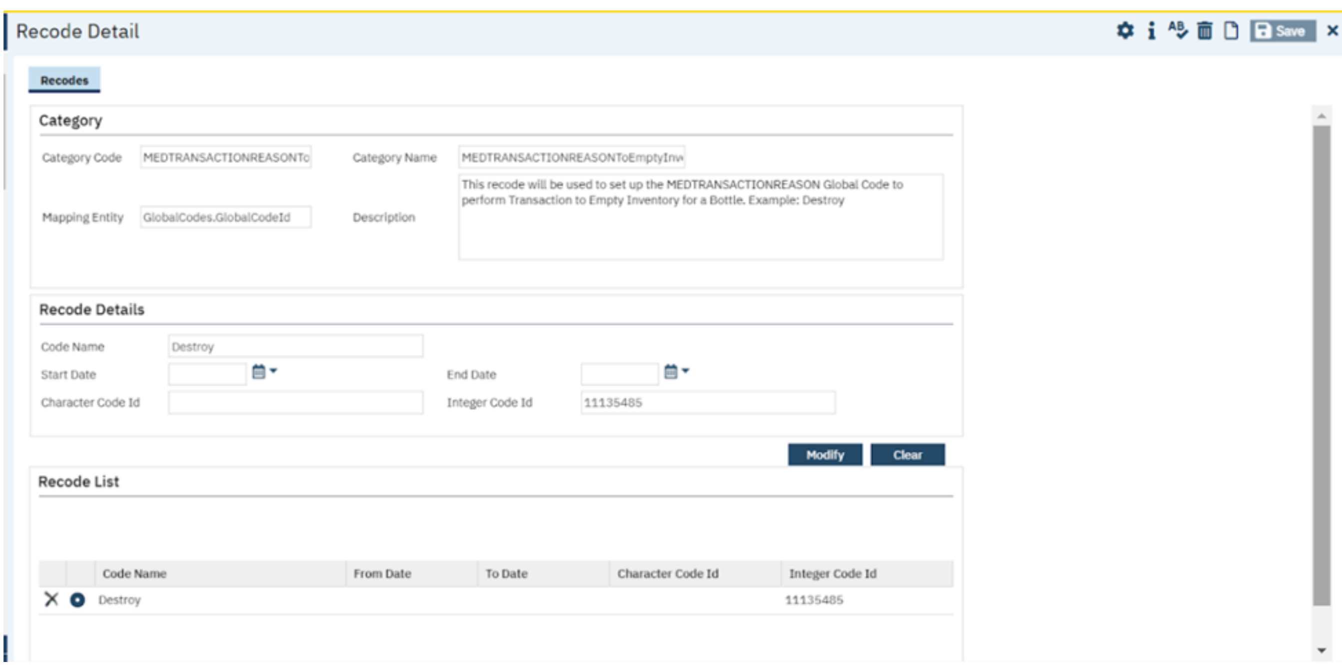
~~**Global Code:**~~

> ~~**MEDTRANSACTIONREASON:** A new option 'Destroy' is added to the existing MEDTRANSACTIONREASON Global Code.~~



~~**Recode Category:**~~

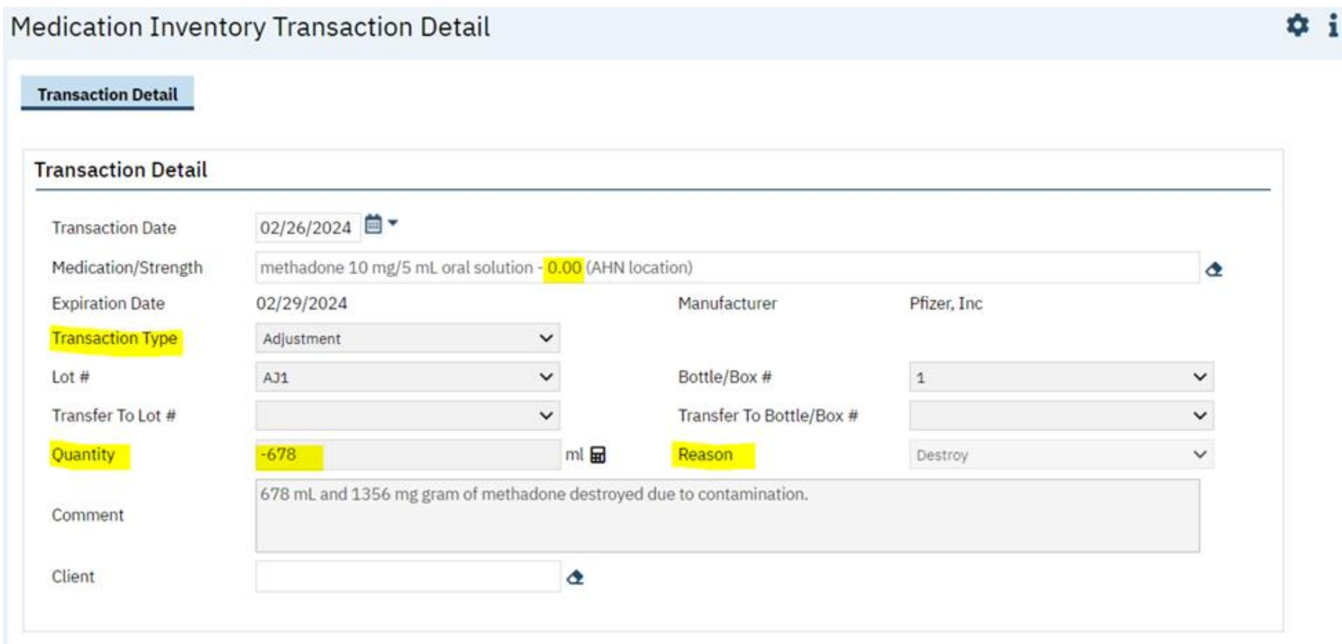
~~**MEDTRANSACTIONREASONToEmptyInventory:** This recode will be used to set up the MEDTRANSACTIONREASON Global Code to perform Transaction to Empty Inventory for a Bottle. The global code 'Destroy' from the 'MEDTRANSACTIONREASON' global code category is mapped to this recode 'MEDTRANSACTIONREASONToEmptyInventory'. Through the **Path:** 'Administration' – 'Recodes' – Select the 'MEDTRANSACTIONREASONToEmptyInventory' – Recode Detail page.~~



~~The following changes have been implemented in the 'Medication Inventory Transaction Detail' screen.~~

- ~~A new option 'Destroy' is added in the 'Reason' dropdown. The Reason field will be enabled only if the transaction type is 'Adjustment'.~~
- ~~When the user selects 'Transaction Type' as 'Adjustment' and reason as 'Destroy', the 'Quantity' field will be disabled.~~
- ~~When a medication/bottle is saved with 'Transaction Type' as 'Adjustment' and reason as 'Destroy', then the remaining quantity will be subtracted from inventory and there will be no further transactions for the medication as the quantity will become zero. The Contents are then manually destroyed by the customer's proper staff.~~
- ~~The 'Transaction Detail' section will be disabled once the user saves the 'Medication Inventory Transaction Detail' screen.~~

~~**Screenshot:** 'Medication Inventory Transaction Detail' screen of a destroyed medication after saving.~~



~~**Author:** Madhu Basavaraju~~

~~72.EII # 125449: Changes are implemented to generate recorded services based on the MAT Medication Dispense.~~

~~**Release Type:** Change | **Priority:** High~~

~~**Prerequisite:**~~

1. ~~The client is enrolled in a 'MAT Program' by following the below **Navigation path**:~~

~~'Administration' -- 'Recodes' – 'Recodes' List page - Select 'SetMATGuestDosingPrograms' value in the 'All Recode Categories' dropdown field - Click on 'Apply Filter' button -- Click on 'SetMATGuestDosingPrograms' hyperlink -- 'Recode Detail' page – Enter 'Code Name' – Enter Start date and End Date - Enter the Program Id(Client enrolled MAT Program) in the 'Integer Code Id' field -- click on 'Insert' -- Click on 'Save'.~~

2. ~~In The Order Setup screen, the Procedure is marked billable by following the below **Navigation path**:~~

~~'Administration' -- 'Orders' - 'Orders' list page – click on New icon - 'Order Details' screen -- Select 'Medication' Order Type -- Select 'Procedure Code' created in Navigation Path1 -- Enter the required fields – Select 'Yes' radio button for options (Billable, Medication Assisted Treatment (MAT)?, Machine Connection Required?, Take Home Allowed?) – click on Save.~~

3. ~~The Entered As is marked as Encounter by following the below **Navigation path**:~~

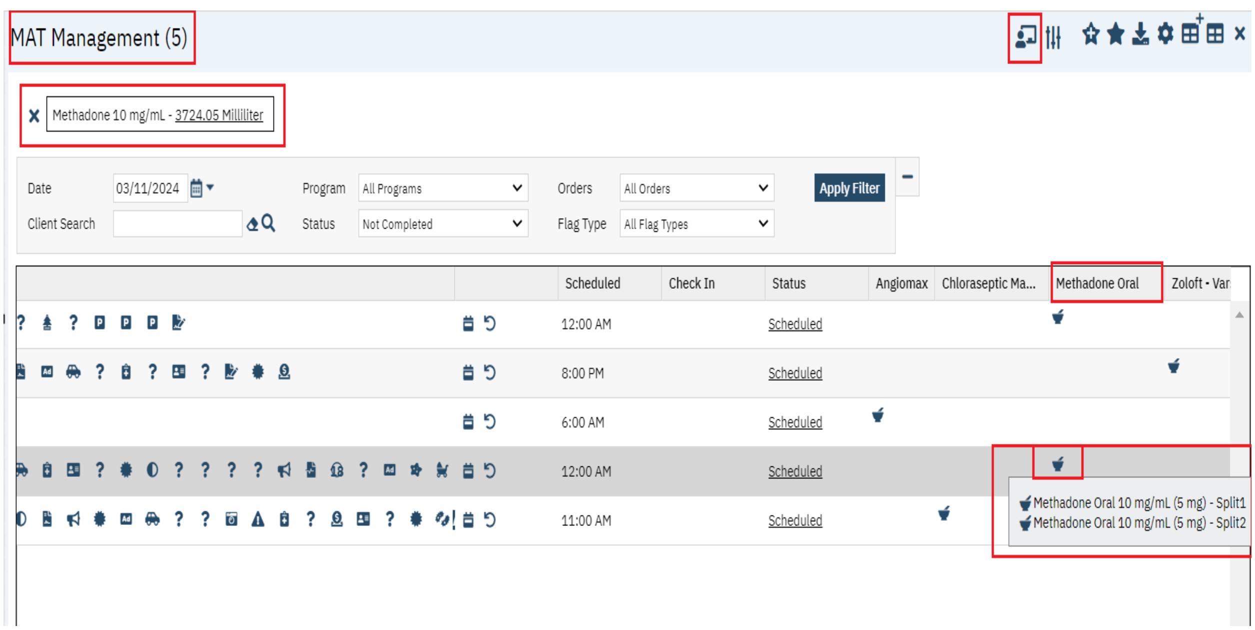
~~'Administration' – 'Procedure/Rates' – click on new icon – 'Procedure Code Details' screen – the 'Order Procedure Code' is checked and 'Entered As' is marked as 'Encounter' -- enter all the other details – Save.~~

4. ~~Sign the Client Order by following the below **Navigation Path**:~~

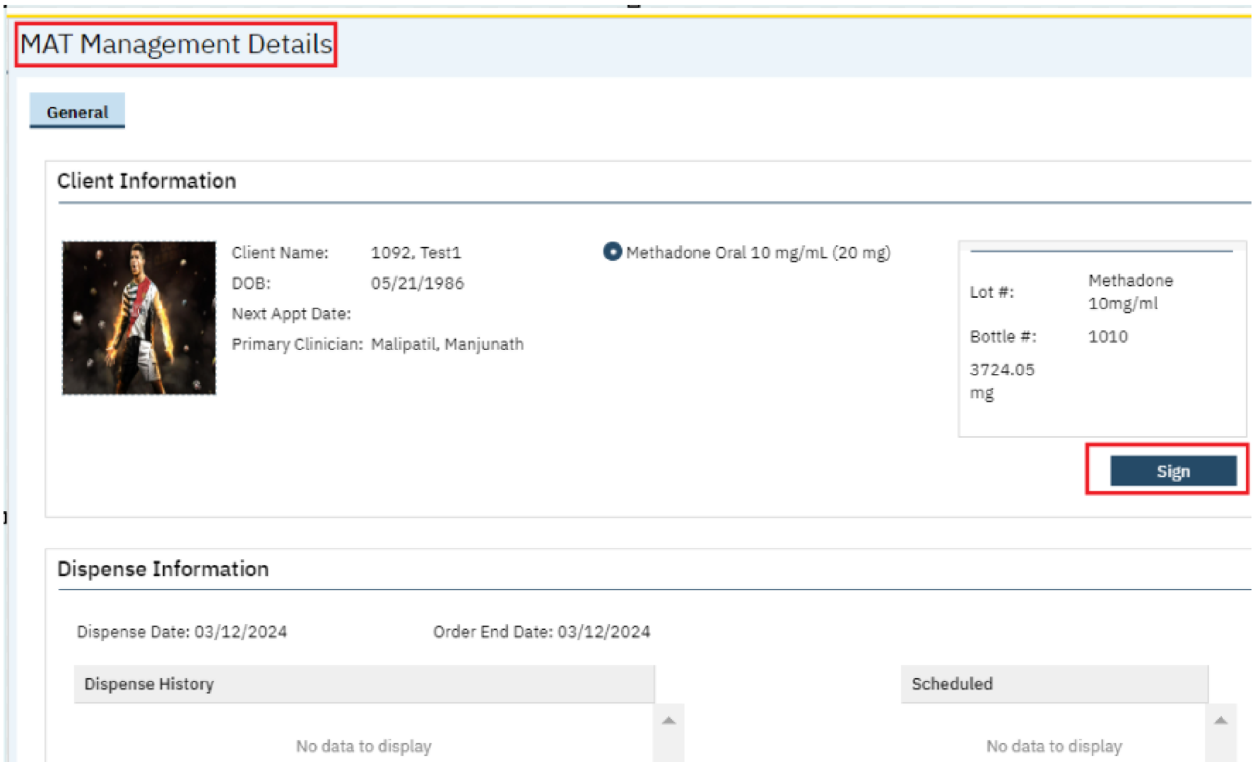
~~'Client' -- Client Orders -- click on new icon -- Search and Select 'Order' (created in Navigation Path3) – Enter all the order details – click on 'Insert' -- click on 'Save' – click on 'Sign'.~~

5. ~~Dispensing the medication using 'Take Home/Dispense' icon in MAT Management List page by following the below **steps:**~~

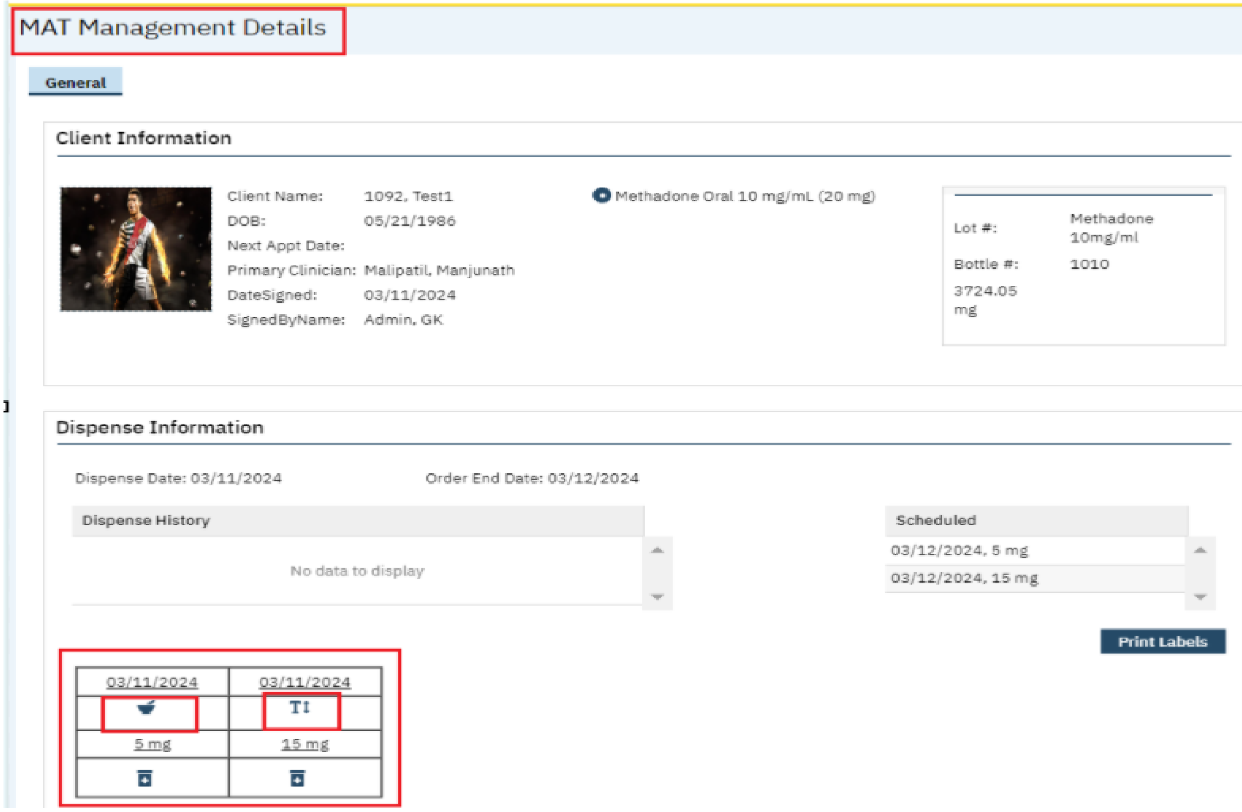
~~'My Office' -'MAT Management' list Page: Connect to Inventory – Click on Dispense Icon for the respective Client, Medication to be dispensed.~~



~~MAT Management Details screen - Click on Sign under Client Information section:~~



~~Click on 'Dispense/Take Home' icon, under 'Dispense Information' section.~~



~~**Navigation Path:** 'Client' -- Services -- Service Detail.~~

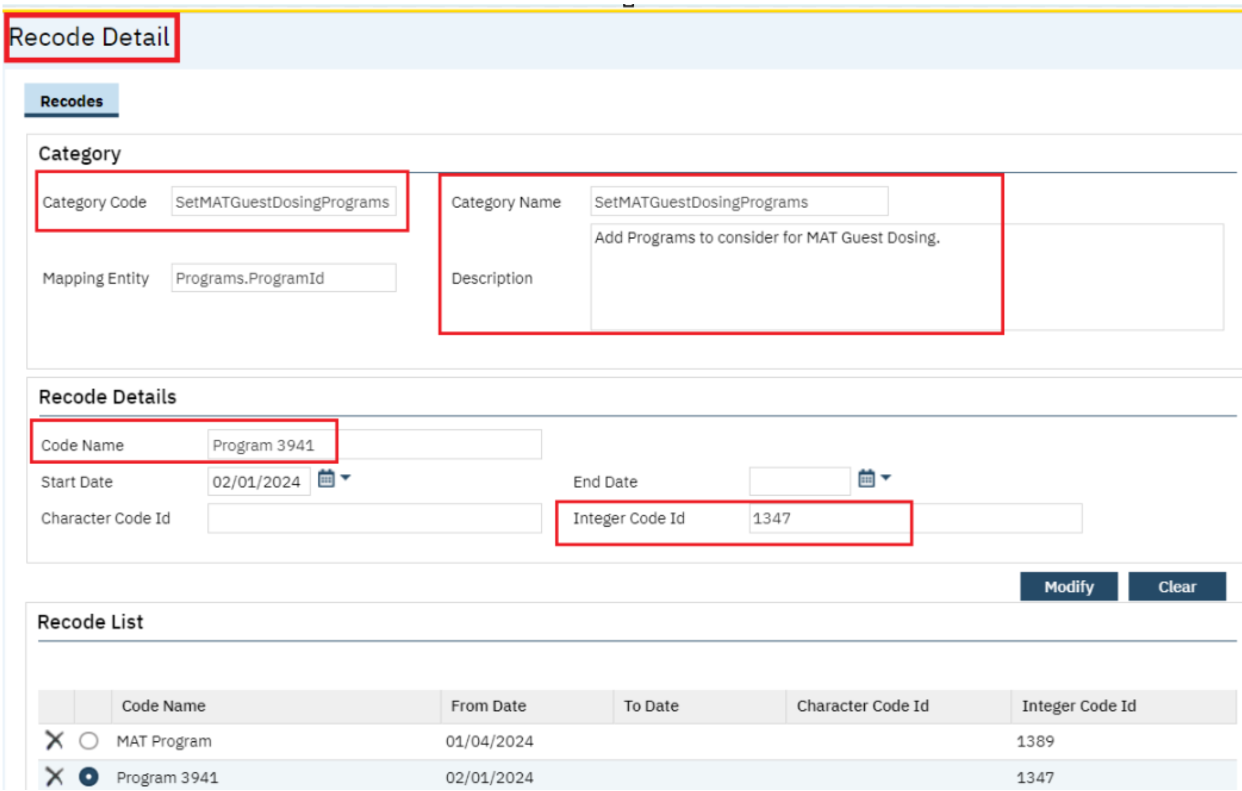
~~**Functionality 'Before' and 'After' release:**~~

~~**Purpose:** To generate recorded services based on the MAT Medication Dispense.~~

~~With this release, a new Recode Category 'SetMATGuestDosingPrograms' has been added and changes have been implemented in 'MAT Management Details' and 'Service Detail' screens.~~

~~**I. 'SetMATGuestDosingPrograms' Recode Category**~~

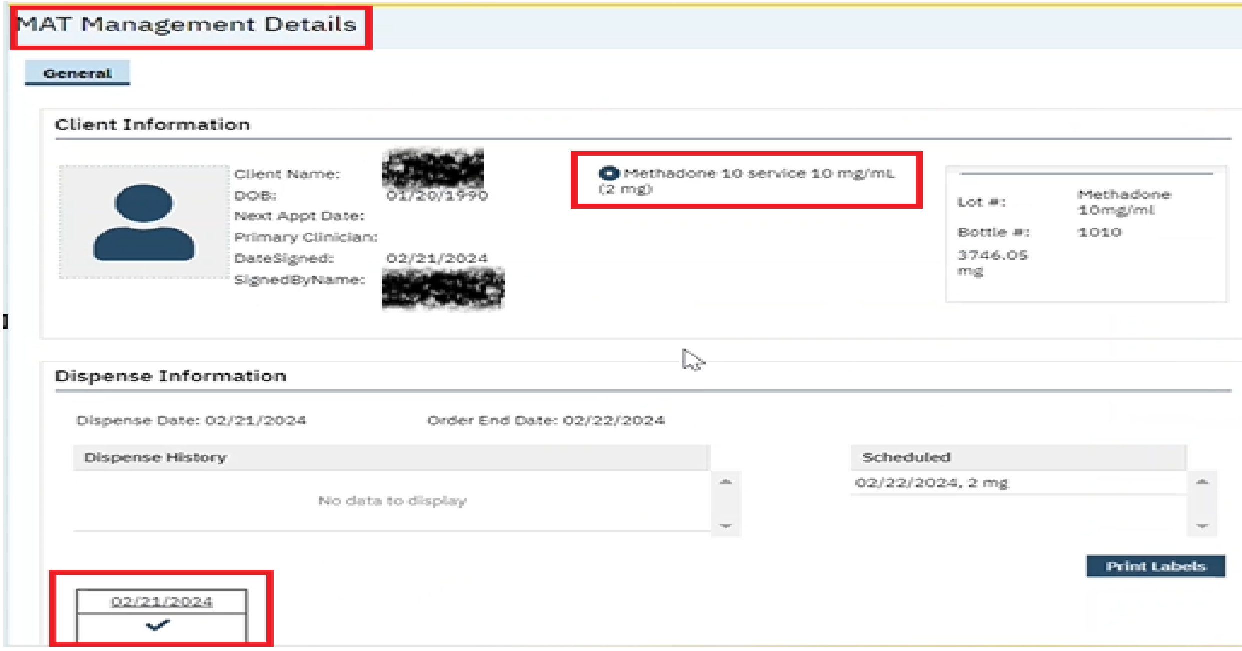
~~The Programs added into this to be considered as MAT Client enrolled for Guest Dosing.~~



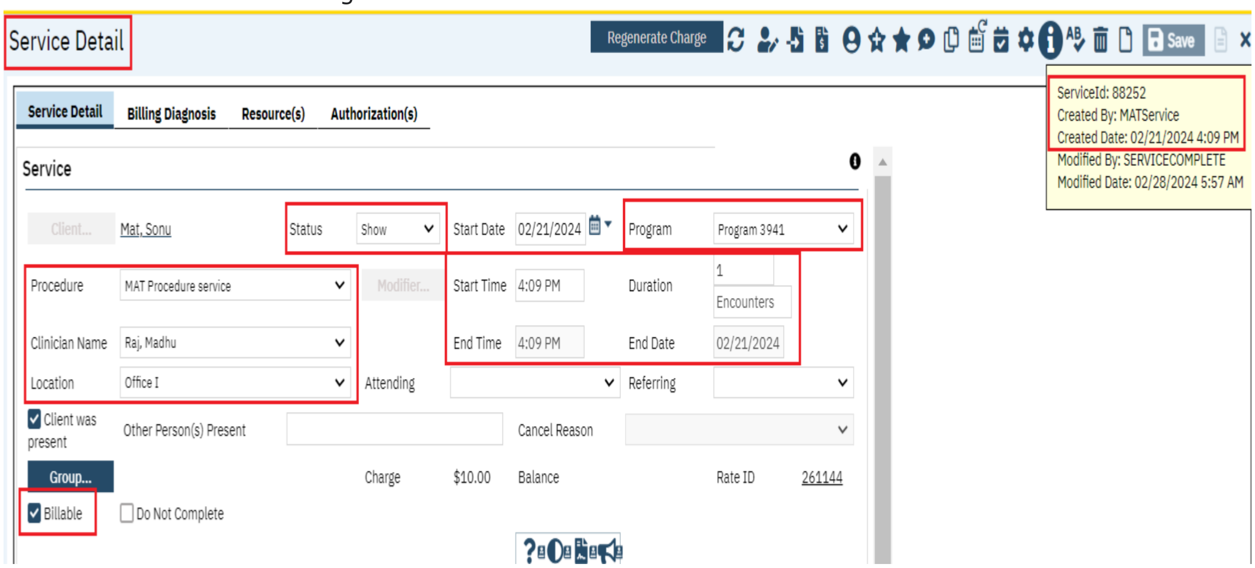
~~**Note:** If this Recode has been end dated by specifying the From Date and To Date, then it is considered as Inactive.~~

~~II. Below mentioned changes have been implemented in 'MAT Management Details' and 'Service Detail'.~~

- ~~When a Medication has been dispensed from the 'MAT Management Details' screen, a service will be created. For each dispense, a service entry will be created and if there is already a Service existing for that day, then another service will not be created.~~
- ~~Take Homes: When the user clicks on 'Take Home/Dispense' icon, a Take Home Medication will be Scheduled, and a service will be created.~~
- ~~Re- Dispense: If there is already a Service existing for that day then on Re- Dispense, then another service will not be created, but it will be mapped the same Service ID.~~
- ~~Splits: The Service will be created for the first split dispense and will map the same Service ID for the other Split.~~



~~The below mentioned fields values will be initialized in the 'Service Detail' screen, when the user dispenses the medication from 'MAT Management Details' screen.~~



1. ~~Client: Client Id for whom the Medication has Dispensed.~~
2. ~~Status: Displays the status as 'Show'.~~
   ~~Note: A nightly job runs every day and marks all those services in Show status to complete.~~
3. ~~Program: Displays the 'Program' based on below conditions:~~
   a. ~~Filters all the programs that are marked as MAT Program in the Program Details:~~
      i. ~~If there are no MAT Programs, service will not be created. Instead, an error will be logged in InpatientServiceErrorLog table.~~

   b. ~~If the client is enrolled in MAT program, then,~~
      i. ~~If the Client is enrolled in a single MAT Program, then the enrolled MAT Program to be selected by default.~~
      ii. ~~If the Client is enrolled in multiple MAT Programs:~~

- ~~If the Recode 'SetMATGuestDosingPrograms' is Inactive or does not contain any program then,~~
    - ~~If the Client is enrolled in the MAT Program is Primary, then the enrolled MAT Program to be selected by default.~~
    - ~~If the Client is enrolled in the MAT Program (none of them are Primary), then the enrolled MAT Program with the older enrolled date to be selected by default.~~

- ~~If The Client is enrolled in any of the MAT Programs mentioned in the Recode 'SetMATGuestDosingPrograms':~~
    - ~~If the Client is enrolled in the MAT Program which is added in the 'SetMATGuestDosingPrograms' Recode, then the enrolled MAT Program to be selected by default.~~
    - ~~If Client is enrolled in the multiple MAT Program which are added in the 'SetMATGuestDosingPrograms' Recode, then the enrolled MAT Program with the older enrolled date to be selected by default.~~

4. ~~Procedure: Displays the procedure code associated with the client order found on the order set up details.~~
5. ~~Clinician Name: Displays the name of the 'Ordering Physician' from "Client Orders".~~
6. ~~Location: Dispensed Location will be displayed.~~
7. ~~Start Date and End Date: Initialize with the 'Date of Dispense'.~~
    a. ~~For 'Face to Face' Dispense - it is set with the 'Date of Dispense'.~~
    b. ~~For 'Take Homes' - it is set with the 'Date of Dispense' the Take Homes scheduled for.~~
8. ~~Start Time and End Time: Initialize with the 'Time' of Dispense, this will be the first Time of dispense during that day.~~
9. ~~Duration: Auto Calculate based on Start and End Time.~~
10. ~~Billable: If the Procedure is marked as Billable, then mark the service as billable.~~
11. ~~Diagnosis: Initialize from the latest Diagnosis document.~~

~~**Note:** If 'EnableClinicalDataAccessGrouping' system configuration Key (CDAG) is marked as 'Yes', then the diagnosis from latest diagnosis document with matching program, will be initialized in Diagnosis tab. This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.~~

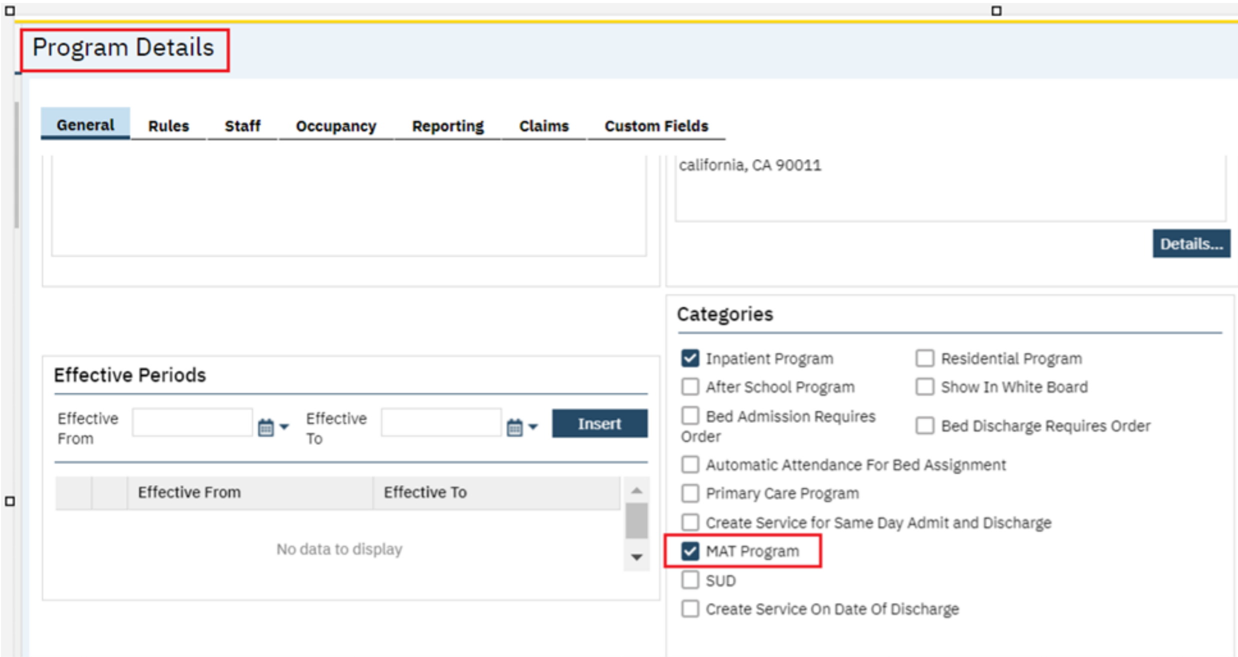
~~**Author:** Chaitali Patil~~

~~73.EII # 124361: MAT: Implementing a new 'MAT Lighthouse Report'.~~

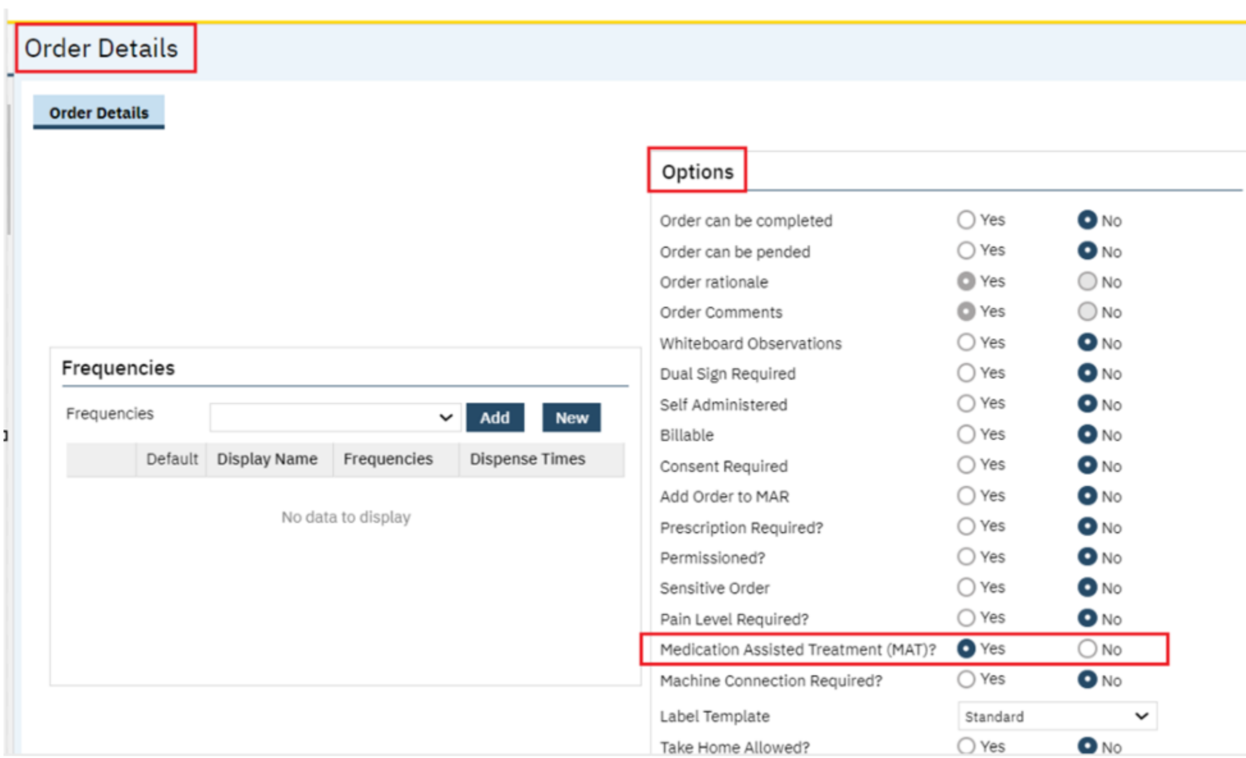
~~**Release Type:** New Functionality | **Priority:** Urgent~~

~~**Prerequisite:**~~

1. ~~In the Categories section of the 'Program Details' page, the MAT Program Checkbox to be checked for Medicated Assisted Treatment (MAT) Programs.~~



2. ~~Medication is signified as 'MAT' medication when the 'MAT' radio button is selected as 'Yes' in the 'Order Details' screen.~~



~~**Navigation Path:** Login into SmartCare - Go Search – 'Mat Lighthouse Report (My Office)' – Select 'Start Date', 'End Date' and 'Home Clinic' - Click on 'View Report'.~~

~~**Functionality 'Before' and 'After' release:**~~

~~**Purpose:** The MAT Lighthouse Report is a mechanism for reporting essential information about MAT clinics to an approved Central Registry, as mandated by federal requirements. This report aims to streamline the reporting process and ensure that information is consistently and automatically submitted to the appropriate authorities, including the Drug Enforcement Administration (DEA) and the state Department of Human Services (DHS). By creating this file, users are not required to manually enter emergency dosing information into the Central Registry application. The focus is on minimizing the manual effort required by on-site staff and ensuring that emergency dosing information is promptly available in the Central Registry application.~~

~~**Functionality 'Before' and 'After' release:**~~

~~With this release, a new 'MAT Lighthouse Report' has been implemented with the below-mentioned sections and fields:~~

~~This report will be utilized manually and also a nightly job has to run.~~

1. ~~**Manually:** The user has to run this report and then export it as 'CSV to Excel'. Customers may manually enter data into the Central Registry website from this generated Report.~~

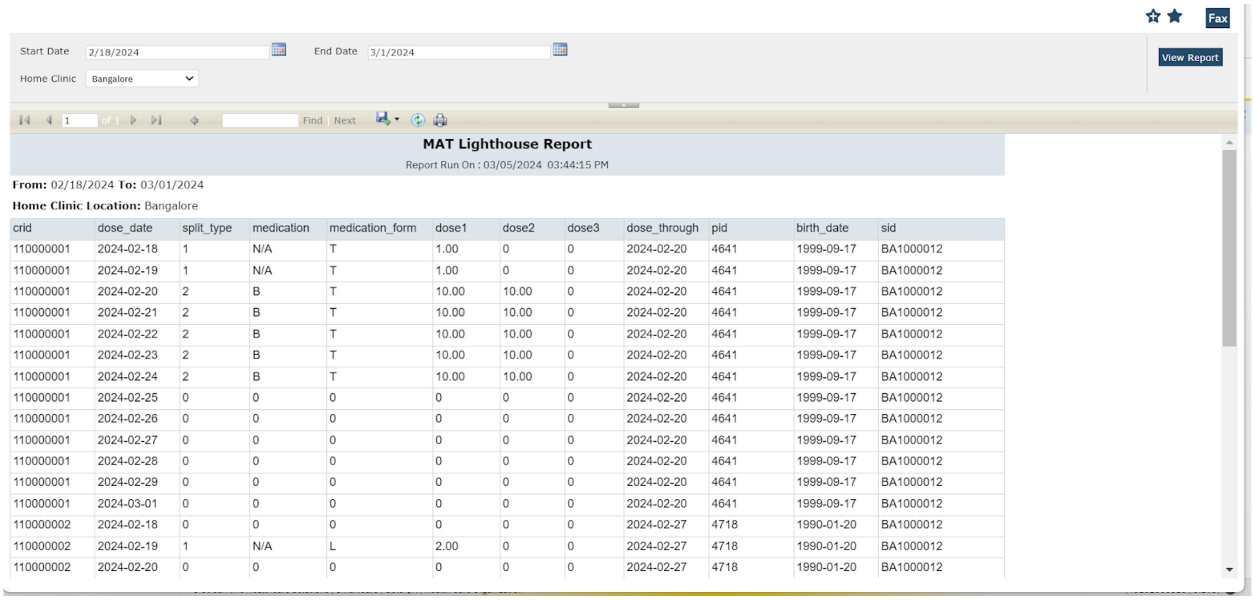
2. ~~**Nightly job:** Customer to have a nightly job set up to run the report at 11:59 pm for every 'Home Clinic', with the defaulted 'Start Date' of Today's Date and defaulted 'End Date' of Today's Date + 13 days, including all Clients enrolled in MAT Program, for each Home Clinic location.~~

   ~~**Note:** Client-assigned 'Home Clinic' values are pulled from the 'Locations' table (MAT Dispensing Locations). The 'Location' ('Home Clinic') is associated with a 'MAT Site/Clinic ID', which is also known as the 'Site ID'.~~

   ~~This nightly job is to export 'CSV' to 'Excel' and save it as a file with 'SiteID_YYYYMMDD' in File Name format.~~

~~**For the 'Manually' report, the below sections will be displayed:**~~

1. ~~Filter section~~
2. ~~Header~~
3. ~~Sub Header~~
4. ~~Grid~~



MAT Lighthouse Report

Report Run On : 03/05/2024 03:44:15 PM

From: 02/18/2024 **To:** 03/01/2024

Home Clinic Location: Bangalore

crid	dose_date	split_type	medication	medication_form	dose1	dose2	dose3	dose_through	pid	birth_date	sid
110000001	2024-02-18	1	N/A	T	1.00	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-19	1	N/A	T	1.00	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-20	2	B	T	10.00	10.00	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-21	2	B	T	10.00	10.00	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-22	2	B	T	10.00	10.00	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-23	2	B	T	10.00	10.00	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-24	2	B	T	10.00	10.00	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-25	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-26	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-27	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-28	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-02-29	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000001	2024-03-01	0	0	0	0	0	0	2024-02-20	4641	1999-09-17	BA1000012
110000002	2024-02-18	0	0	0	0	0	0	2024-02-27	4718	1990-01-20	BA1000012
110000002	2024-02-19	1	N/A	L	2.00	0	0	2024-02-27	4718	1990-01-20	BA1000012
110000002	2024-02-20	0	0	0	0	0	0	2024-02-27	4718	1990-01-20	BA1000012

~~**Filter Section:** This section consists of the below-mentioned fields:~~

- ~~**Start Date:** This is a date control field that is mandatory and is set to initialize with the current date (Today's Date). This date control is specifically designed for the "Start Date" of the MAT program. It pulls information about all clients who are currently enrolled in the 'Medication-Assisted Treatment (MAT) program' from that specified start date.~~

- ~~**End Date:** This is a date control and Mandatory (required field). This field is set to initialize with "Today's Date + 13 days." This field will Auto-generate 13 days from Today's Date whenever the report is opened.~~

- ~~Additionally, it seems that this date control field has an auto-generation feature. When the report is opened, the field will automatically update to reflect a date that is 13 days from the current date (Today's Date). This automated process ensures that the field consistently represents a date that is two weeks into the future every time the report is accessed.~~

  ~~After modifying the 'Start Date' it will not continue to Auto-calculate the End Date. It only calculates at the time when the report is opened.~~

- ~~**Home Clinic:** This is a dropdown field and Mandatory (required field), Defaulted as Null.~~

  ~~This field displays a list of values of the 'Home Clinic' field in the Client Information screen - MAT tab - General section (The Home Clinic field lists values from the Locations table).~~

  ~~This report is only to run one Home Clinic at a time.~~

~~**2. Header Section**: This section consists of the below-mentioned fields:~~

- ~~**Report Name:** The report name will appear as 'MAT Lighthouse Report' in this field.~~
- ~~**Report Run On:** This field will display the 'Date' and 'Time' in MM/DD/YYYY HH:MM:SS AM/PM format when the report is executed.~~

~~**3. Sub-header Section:** This section consists of the below-mentioned fields:~~

- ~~**From:** This field will display the start date that is selected from the filter.~~
- ~~**To:** This field will display the end date that is selected from the filter.~~
- ~~**Home Clinic Location:** This field will display the list of Home Clinic Location(s) that are selected in the filter.~~

~~**4. Grid Section:** This section consists of the below-mentioned fields:~~

- ~~**crid:** This column will pull the value from 'Client Information' - 'MAT' - General. The CRID (Central Registry ID Number) will be displayed in this column, allowing a maximum length of 9 characters.~~

- ~~**dose_date:** This column will pull all the dates when the MAT client is enrolled in the MAT program (status = Enrolled). One Date per row and the date format will be converted to YYYY-MM-DD.~~

~~**Note:** This field will display the scheduled date for dosing, not the dispense date, for MAT clients who have an active 'MAT medication order'. The field considers MAT clients based on their enrollment in a 'MAT Program', regardless of whether they have MAT medication orders or not.~~

- ~~**split_type:** This column will signify the split doses, and it will be pulled from the 'Client Order'.~~

  1) ~~If the regular order of one dose is daily and there is no value in the Split 1 field, then this field will be displayed as "1".~~

  2) ~~If there is a 2-way split (for example, a split of 75mg and 50mg), then this field will be displayed as "2".~~

  3) ~~If there is no MAT medication order for the client, then this field will be displayed as "0".~~

  4) ~~In all other scenarios where this data is not available, then this field will be displayed as "NA".~~

- ~~**medication:** This column will display the name of the 'MAT medication' that is scheduled for a client.~~
  1. ~~If the 'MAT medication' is scheduled for a client, then as per the (MDMedications) mapping table structure, the 'MAT medication' name will be displayed in this column.~~

     ~~**Examples:**~~

     ~~**i.** If the scheduled MAT Medication Name is **'buprenorphine TD',** then the medication name will be displayed as **'B'.**~~

     ~~**ii.** If the MAT Medication Name is **'Methadone Oral'**, then the medication name will be displayed as **'M'**.~~

  2. ~~For scenarios where MAT medication exists but data is not available (does not match the Mapping Table Structures), then this column will be displayed as "N/A".~~

  3. ~~If no MAT medication exists for the client in the 'Client Order', then this column will be displayed as "0".~~

     ~~**Note:** A medication is signified as a 'MAT' medication when the 'MAT' radio button is selected as 'Yes' in the 'Order Details' screen.~~

- ~~**medication_form:** This column will display the 'MAT medication Form' as per the (MDMedications) mapping table structure.~~

~~**Examples:**~~

1. ~~If the DosageFormCodeDescription is **'CONCENTRATE, ORAL'**, then the medication form will be displayed as **'L'**.~~
2. ~~If the DosageFormCodeDescription is **'TABLET'**, then the medication form will be displayed as **'T'**.~~

~~For some scenarios where MAT medication exists but data is not available (does not match the Mapping Table Structures), this column will be displayed as "N/A".~~

~~If no MAT medication exists for the client in Client Order, Then this column will be displayed as "0"~~

- ~~**dose1:** This column will display the numeric value of Split 1 from the 'Client Order-Order' section. If this field does not hold any value, then the 'Dose' value from the 'Client Order-Order' section will be displayed.~~

- ~~**dose2:** This column will display the numeric value of Split 2 from the 'Client Order-Order' section. If this field does not hold any value, then "0" will be displayed.~~

- ~~**dose3:** This column will display as "0".~~

  ~~**Note:** As SmartCare does not support 3-way splits, this field will always display as "0".~~

- ~~**dose_through:** This column will display the last 'dispensed date' on which the MAT client is dispensed MAT medication, regardless of the filtered date range. The date format will be displayed as YYYY-MM-DD.~~

- ~~**PID:** This column will display the 'ClientId' from the 'Client Information' screen.~~

- ~~**birth_date:** This column will display the 'DOB' from the 'Client Information' screen. The date format will be displayed as YYYY-MM-DD.~~

- ~~**Sid:** This column will display the value from the 'MAT Site/Clinic ID' field, which is a new textbox in 'Location Details- Additional Information'.~~

- ~~**th_ordered:** This column will display the number of 'Take Home Days' for MAT medication that is scheduled for a client. This field will only be visible in the 'CSV' file and not in the report.~~

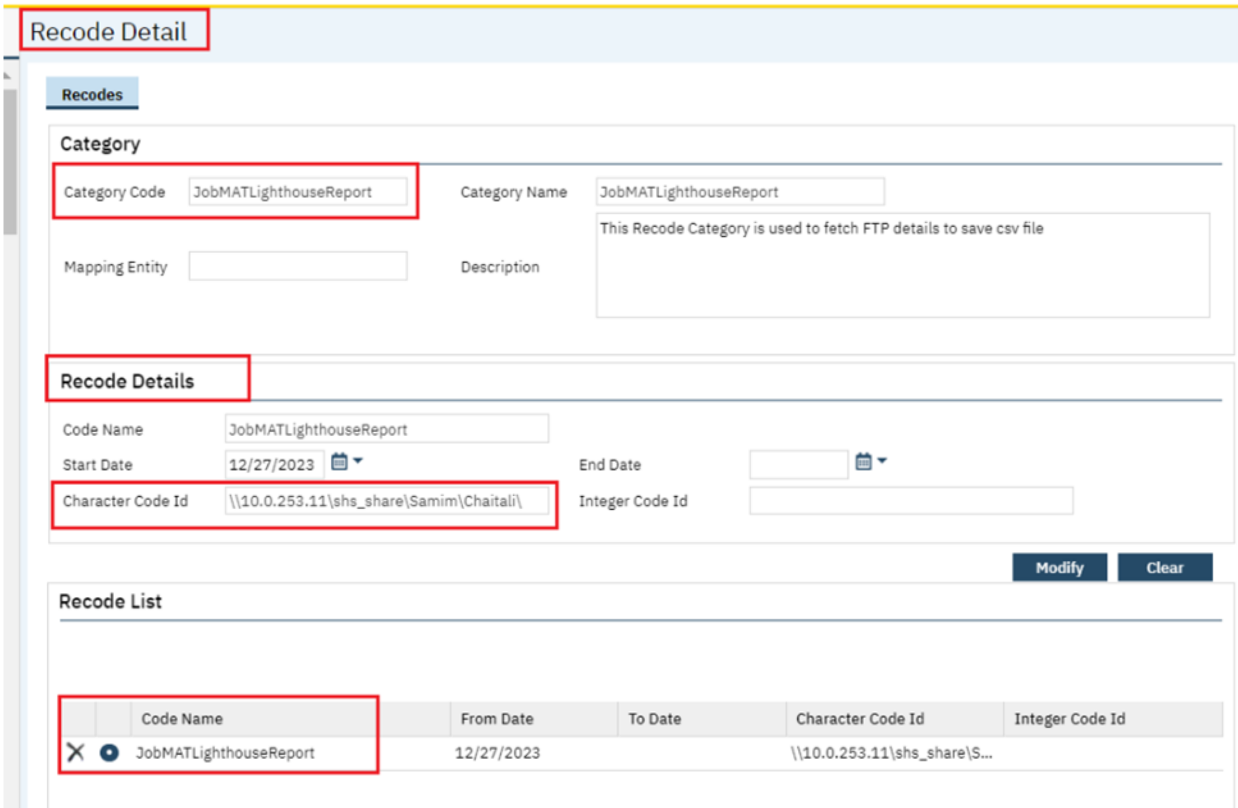
- ~~**clinic_days:** This column will display the days of the week when the client is available in the clinic for a 'Face to Face dose'. This field will only be visible in the 'CSV' file and not in the report.~~

~~**The second part of the MAT lighthouse Report is the Nightly job:**~~

~~To export all the data in the CSV file for the nightly job, set up a record as follows:~~

~~**Recode Name: 'JobMATLighthouseReport'**~~

~~**Navigation Path 1:** Go search – Recode (Admin) – search for the recode - "JobMATLighthouseReport" – insert one record in the 'Recode Details' screen Like Code name – 'JobMATLighthouseReport' - 'Start Date' - 'Character Code Id' – give the folder path like e.g. (\\10.0.253.11\shs_share\Sneha\) -- insert the record in the grid – click on 'Save'.~~



~~**Navigation Path 2**: Log in to the SQL Server – Run the SQL job - 'EXEC SSP_JobMATLighthouseReport' – click on the windows (r) – Enter the Folder path mentioned in (Navigation Path1) – click on Ok – CSV file generated in this folder.~~

~~**Regarding the Nightly Job and CSV File:**~~

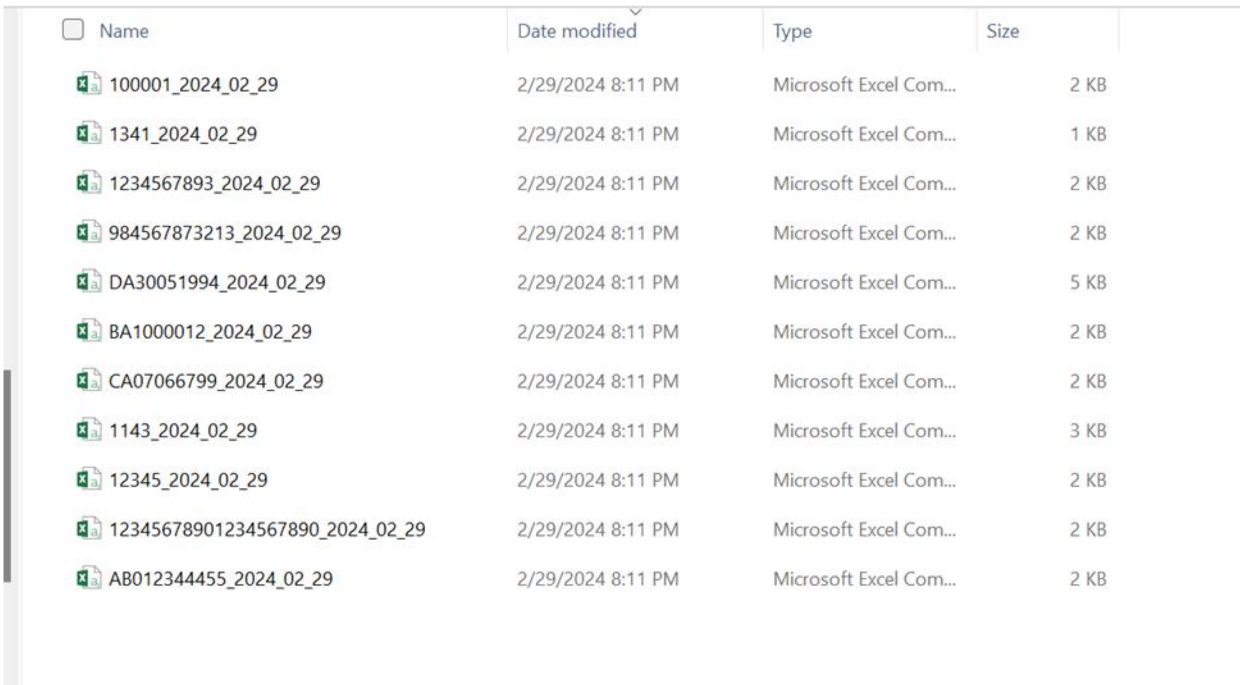
- ~~To run a MAT lighthouse Report every night at 11:59 pm for every 'Home Clinic', the job needs to set up with the default Start Date as Today's Date and the default End Date as Today's Date + 13 days. This will ensure the report runs nightly and shows the data for the next 13 days.~~
- ~~To clarify, the nightly job will include all clients enrolled in the MAT Program for each Home Clinic location, regardless of whether there is a MAT Medication listed for a client in the 'Client Order'. This will ensure that the report shows all clients enrolled in the program, regardless of whether they are currently taking medication or not.~~
- ~~Client-assigned 'Home Clinic' values are pulled from the Locations Table (MAT Dispensing Locations). The 'Location' ('Home Clinic') is associated with a 'MAT Site/Clinic ID', which is also known as the 'Site ID'.~~
- ~~To pull the client-assigned 'Home Clinic' values, the system will need to access the Locations Table, which contains the 'MAT Dispensing Locations'. The 'Location' or 'Home Clinic' value is associated with a 'MAT Site/Clinic ID', which is also known as the 'Site ID'. This 'Site ID' is used to identify the exact location of the client's Home Clinic and retrieve data related to that specific clinic.~~

- ~~The export file generated by the system will follow the standard CSV format as defined in the 'Records Standards' for the 'CSV Files document'. The field separator used in the file will be in the ISO Standard format of comma-separated values. This will ensure that the data in the file is easily readable.~~
- ~~The format for the file name will be SiteID_YYYY_MM_DD.csv, to pull in the 'SiteID' (based on the Home Clinic), where 'SiteID' is the ID of the Home Clinic associated with the report and YYYY_MM_DD is the date on which the report is run. This naming convention will ensure that the files are easily identifiable and organized based on the 'Home Clinic' and the 'date of the report'.~~

~~After Running the 'SQL Job' below CSV Files are created in the folder path: for every home clinic, one 'CSV' file has been created.~~

~~Once the 'SQL Job' has been run, CSV files will be created in the specified folder path. The CSV file will be created for every Home Clinic, based on the 'SiteID' associated with the Home Clinic. The name of each file will follow the naming convention of 'SiteID_YYYY_MM_DD.csv', where SiteID is the ID of the Home Clinic, and YYYY_MM_DD is the date on which the report is run.~~

~~CSV File System:~~



Name	Date modified	Type	Size
100001_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
1341_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	1 KB
1234567893_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
984567873213_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
DA30051994_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	5 KB
BA1000012_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
CA07066799_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
1143_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	3 KB
12345_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
12345678901234567890_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB
AB012344455_2024_02_29	2/29/2024 8:11 PM	Microsoft Excel Com...	2 KB

~~Example of CSV File ('Microsoft Excel' Format):~~

A	B	C	D	E	F	G	H	I	J	K	L	M	N
crid	dose_date	split_type	medication	medication_form	dose1	dose2	dose3	dose_through	pid	birth_date	sid	th_ordered	clinic_days
123456789	2/29/2024	2	N/A	L	5	5	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/1/2024	2	N/A	L	5	5	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/2/2024	2	N/A	L	5	5	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/3/2024	2	N/A	L	5	5	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/4/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/5/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/6/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/7/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/8/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/9/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/10/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/11/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/12/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat
123456789	3/13/2024	0	0	0	0	0	0	2/27/2024	1418	12/12/1979	AB0123444	0	Wed Fri Sat

~~**Example of Complete record for 1 Patient('Notepad' Format)**~~

new 1.txt | AB012344455_2024_02_29.csv

```
crid,dose_date,split_type,medication,medication_form,dose1,dose2,dose3,dose_through,pid,birth_date,sid,th_ordered,clinic_days
123456789,2024-02-29,2,N/A,L,5.00,5.00,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-01,2,N/A,L,5.00,5.00,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-02,2,N/A,L,5.00,5.00,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-03,2,N/A,L,5.00,5.00,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-04,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-05,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-06,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-07,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-08,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-09,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-10,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-11,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-12,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
123456789,2024-03-13,0,0,0,0,0,0,2024-02-27,1418,1979-12-12,AB012344455,0,Wed Fri Sat
```

~~**Data Model Change:**~~

~~For the **MAT Lighthouse Report,** two new tables have been added:~~

1. ~~MATLighthouseMedicationMappings.~~
2. ~~MATLighthouseDosageFormCodeMappings~~

~~**Author:** Madhu Basavaraju~~

~~74.EII # 1787: Methadone API integration in SmartCare.~~

~~**Release Type:** Change **|** **Priority:** Medium~~

~~**Navigation Path 1:** 'Administration' - 'Orders' - - 'Orders' list page - - New - - 'Order Details' screen – Select 'Medication' Order Type – Enter the required fields - Select 'Yes' radio button for options (Medication Assisted Treatment (MAT)?, Machine Connection Required?, Take Home Allowed?) -- click on Save.~~

~~**Navigation Path 2:** 'Client'– 'MAT Exception Document' – click on new icon -- 'MAT Exception Document' details screen -- Enter the required fields -- click on Save – Click on Sign.~~

~~**Navigation Path 3:** 'Client' -- 'Client Orders' - - 'Client Orders' list page - - New -- 'Client Order details' screen - - Select the Order created in Navigation Path 1 - - Enter the required fields – Insert – click on Save and Sign.~~

~~**Navigation Path 4:** 'My Office' – 'MAT Management' -- 'MAT Management' list page – Click on 'Connect User' icon – 'Connection Details' popup – Enter the Connection Details – Click on 'Connect' -- Click on 'Dispense' icon for the 'Client' Medication to be dispensed in the MAT Management list page – 'MAT Management Details' screen~~

~~– click on Sign in the Client Information section -- Click on 'Take Home/Dispense' Icon in the Dispense Information section.~~

~~**Purpose:** To communicate between SmartCare application and Medication Dispenser Machine.~~

~~**Functionality 'Before' and 'After' release:**~~
~~With this release, the Methadone API is designed to communicate between SmartCare application and Medication Dispenser Machine and the below-mentioned changes have been implemented in the 'MAT Management' list page and MAT Management Details screen.~~

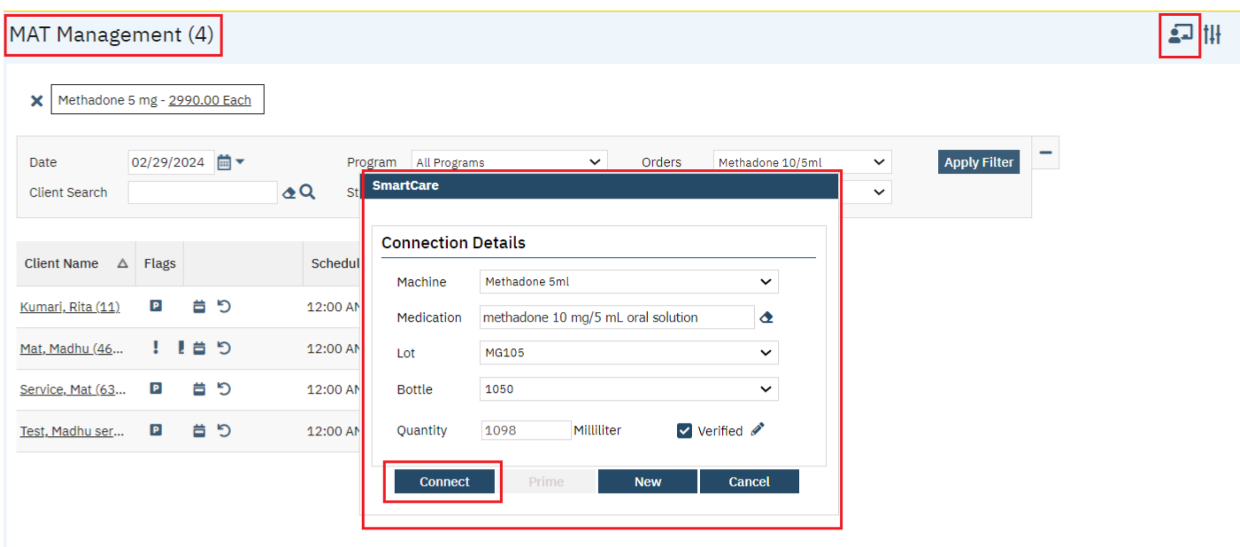
- ~~When the user clicks on 'Connect User' icon in the 'MAT Management' list page, the 'Connection Details' popup is displayed.~~
- ~~In the 'Connection Details' popup, the following functions will be displayed. By using these functions, the user can connect with the Dispenser Machine and dispense the medication.~~

~~Functions displayed in 'Connection Details' popup of MAT Management List page.~~
~~1. Connect~~
~~2. Prime~~
~~3. UnPrime~~
~~4. Abort (Disconnect)~~

~~Functions displayed in MAT Management Details page.~~

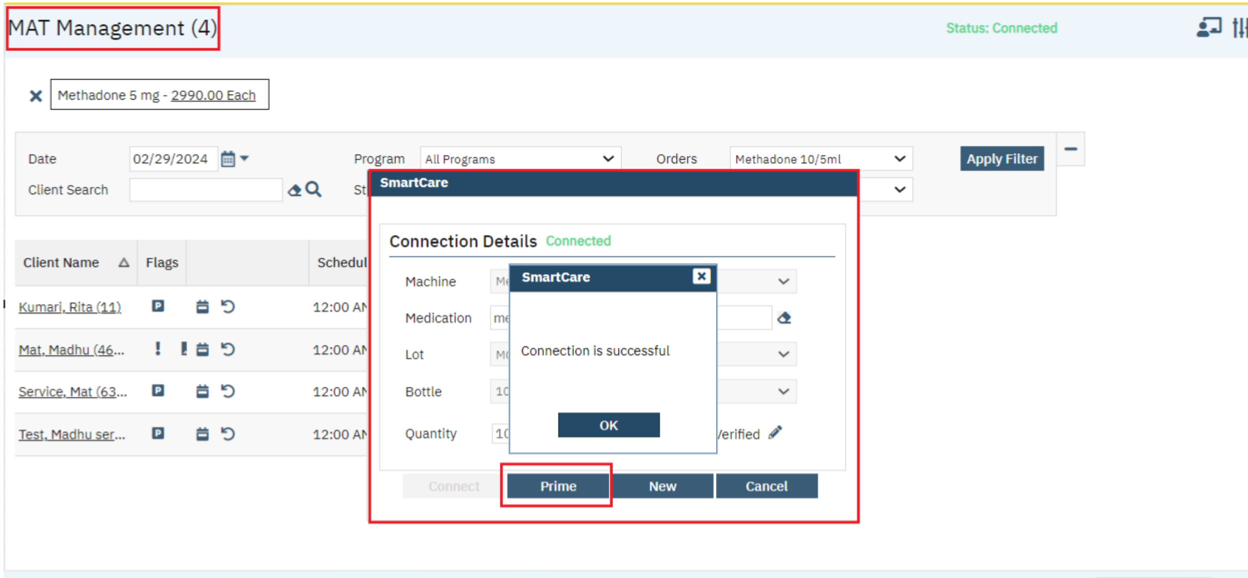
~~5. Dispense~~
~~6. Re-dispense~~

1. ~~**Connect:** This function is used to call API URL to connect with the Dispenser machine and to perform operations like Prime, UnPrime, Abort, Dispense and Re-dispense.~~



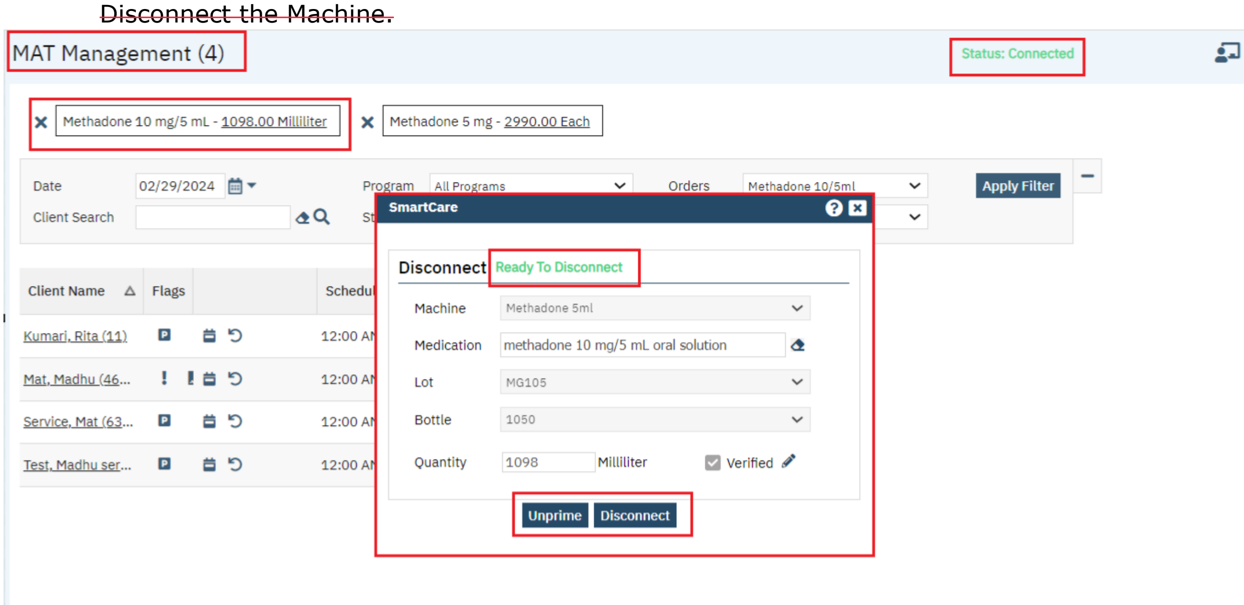
~~After clicking on connect, follow the 'Instruction Messages' in the popup for 'Prime' Operations.~~

2. ~~**Prime:** This function is used to send "P" command to the dispenser machine to do the Prime operation.~~

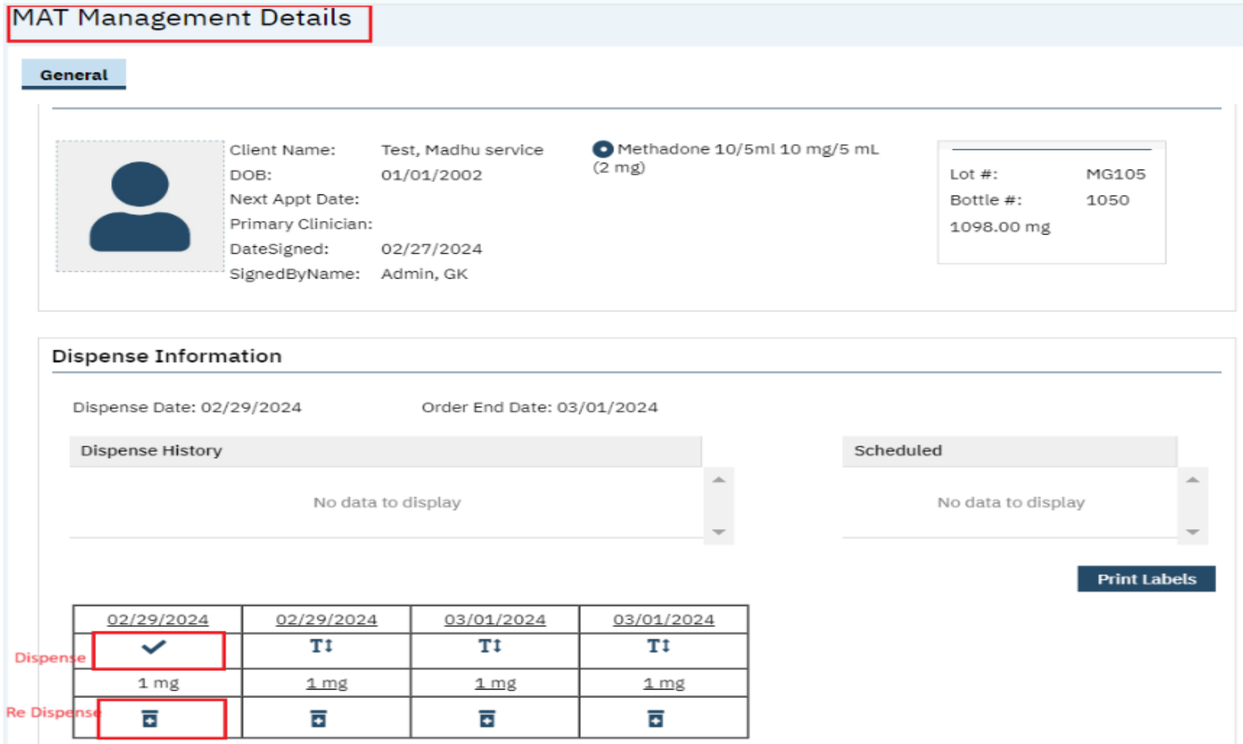


3. ~~**UnPrime:** This function is used to send "E" command to the dispenser machine to do the UnPrime (Empty) operation.~~

4. ~~**Abort (Disconnect):** This function is used to send "A" command to the dispenser machine to Disconnect the Machine.~~



~~**5. Dispense/Re Dispense:** In Dispense/Re-Dispense, we are sending "V10" command. In this, the "V" is Command, "10" is Dispense value (Dispense Quantity) to do the dispense operation.~~



Non-staff users

Reference No	Task No	Description
75	Core Bugs # 127052	Patient Portal User role permissions are getting overwritten.
76	Core Bugs # 127143	Patient Portal: My Dashboard Layout not aligned and sorted properly.

Author: Abhishek Naik

75.Core Bugs # 127052: Patient Portal User role permissions are getting overwritten.

Release Type: Fix | **Priority:** Medium

Navigation Path 1: Login to SmartCare with Patient Portal Credentials – Check the left navigation Menu.

Navigation Path 2: Client -- Client information – 'Contacts' tab -- Create 'Client Contact' – Click 'Create' button to generate a Patient Portal ID – Login to Patient Portal.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. The 'Patient Poral User' role permissions were getting overwritten when the Client Contact patient portal account was created. This was causing the mismatch in the Quicklinks when logs in through the Client and Client contact Patient Portal accounts.

With this release, the above-mentioned issue has been resolved. Now, the 'Patient Poral User' role permissions is not getting overwritten when the Client Contact patient portal account is created. Also, the Quicklinks are similar when the user logs in through the Client and Client contact Patient portal accounts.

Author: Kiran Tigarimath

76.Core Bugs # 127143: Patient Portal: My Dashboard Layout not aligned and sorted properly.

Release Type: Fix **|** **Priority:** Medium

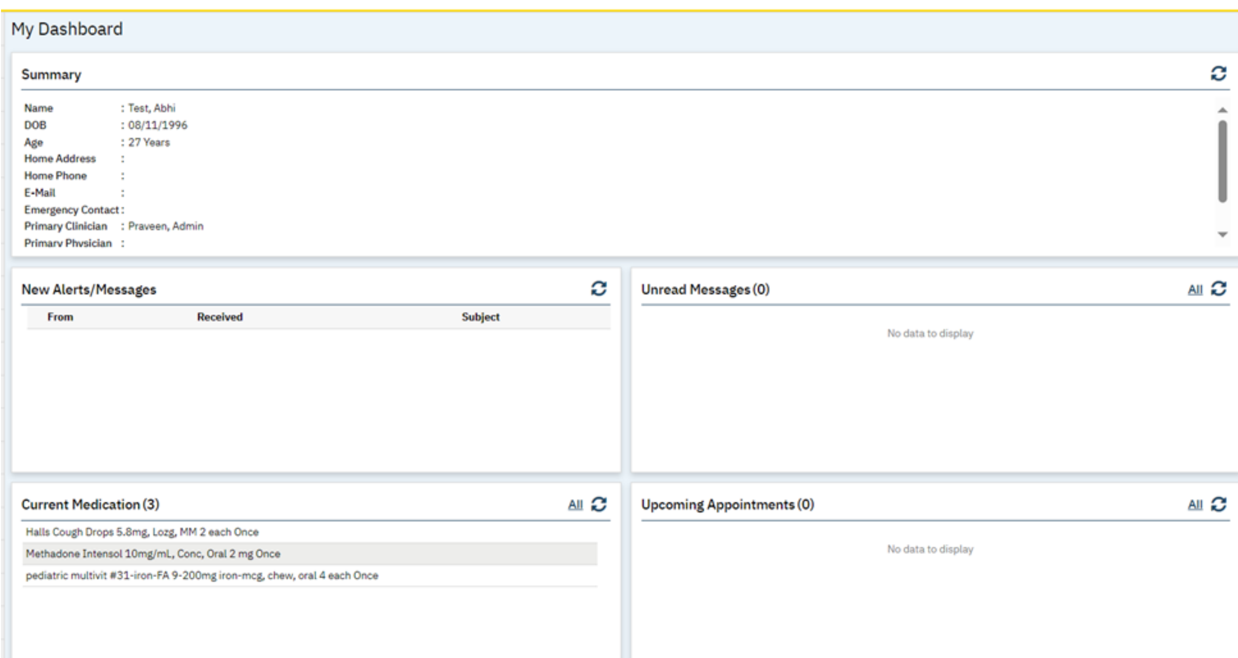
Navigation Path: 'Patient Portal Login' - 'Dashboard'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The patient portal user's dashboard widgets were not aligned and not sorted properly.

With this release, the above-mentioned issue has been resolved. Now, the admin user is able to sort and align the widgets from the admin account and the same will be reflected in all the patient portal users 'Dashboard' screens.

Screen shot:



Orders

Reference No	Task No	Description
77	Core Bugs # 127137	Order Details: 'Sensitive Order' not displaying.
78	Core Bugs # 126993	Export button not working in the Orders list page for filtered data.

Author: Chaitali Patil

77.Core Bugs # 127137: Order Details: 'Sensitive Order' not displaying.

Release Type: Fix **| Priority:** Medium

Navigation Path: Go Search - Orders (Administration) - Order Details Screen - Options section.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior, In the Order Details screen, on selecting any order type, 'sensitive order' disappeared under the option section.

With this release, the above-mentioned issue has been resolved. Now in the Order Details screen, 'Sensitive Order' is displaying under the option section for all the order types (except for Activity Order type).

Note: Sensitive order will not display for Activity order type.

Author: Madhu Basavaraju

78.Core Bugs # 126993: Export button not working in the Orders list page for filtered data.

Release Type: Fix **| Priority:** Medium

Navigation Path: Go Search - 'My Office'– 'Orders'. - Orders screen - Filter the data - Apply Filter- click on Export Icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to Export the filtered data by clicking the 'Export' icon, the 'Export' function was not working in the Orders list page.

With this release, the above-mentioned issue has been resolved. Now, in the Orders list page, the users can Export filtered data on clicking the 'Export' icon.

Payments/Adjustments

Reference No	Task No	Description
79	Core Bugs # 126884	Client Payment Auto Post will Post payment to the Oldest Open Accounting Period.

Author: Sahana Gururaja

79. Core Bugs # 126884: Client Payment Auto Post will Post payment to the Oldest Open Accounting Period.

Release Type: Fix **| Priority:** Medium

Prerequisites: Select a client that has a 'Self-Pay' balance, and again go to the 'Payments/Adjustments' screen and apply a 'Client Payment' for the same client.

Navigation Path: 'My Office' – go to the 'Payments/Adjustments' -- click on the 'New EOB/Payment/Adjustment' button – In the 'Activity' tab –set the "Date" field to the current date – select the 'Type' as 'Client Payment' -- enter the amount in 'Amount' field and Choose "Oldest Balance First" option in the "Auto Post" field – and then select the 'Accounting Period' and enter all the required details in the 'Payment/Adjustment Posting' banner – click on the 'Update' button – the system will display the record in the 'Activity' tab — click on the 'ID' hyperlink in the 'Services' tab to view the details.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user created a 'Client Payment' with an "Oldest Balance First" in the "Auto Post" field, and then clicked on the 'ID' hyperlink in the 'Services' tab, the accounting period defaulted to the 'Oldest Accounting Period' in the 'Previous Entry' section of the 'Correction' pop-up screen, even if a different period was selected in the 'Acct. Period' field.

With this release, the above-mentioned issue has been resolved. When the user creates a 'Client Payment' with an "Oldest Balance First" in the "Auto Post" field, and then clicks on the 'ID' hyperlink in the 'Services' tab, in the 'Previous Entry' section of the 'Correction' pop-up screen, the accounting period now matches the selected period in the 'Acct. Period' field.

Plans

Reference No	Task No	Description
80	EII # 126570	Custom Crossover Claims logic for 'Do Not Bill during transfer to Secondary'.
81	Core Bugs # 127070	Plans: The copied 'Billing Codes' from the primary plan to the secondary plan appeared blank under the "Billing Codes" tab.

Author: Yashas Kydalappa

80. EII # 126570: Custom Crossover Claims logic for 'Do Not Bill during transfer to Secondary'.

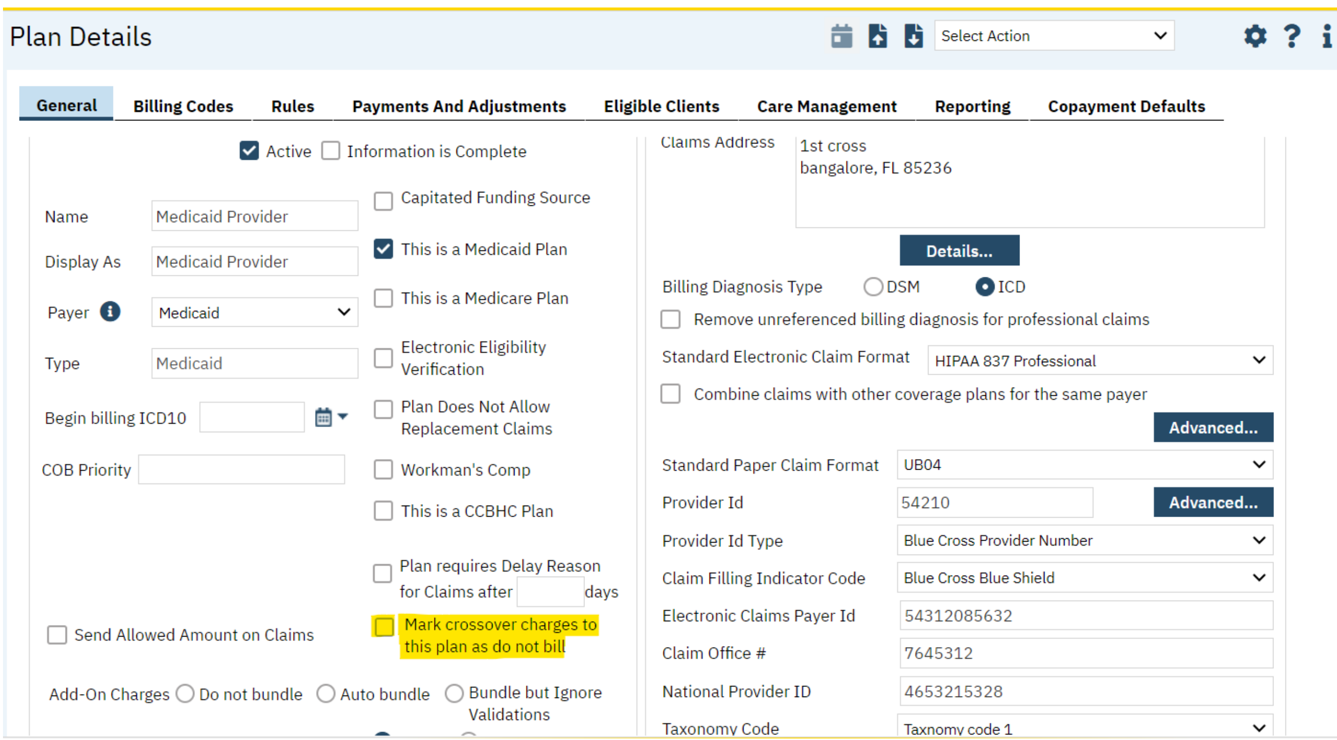
Release Type: Change | **Priority:** On Fire

Navigation Path (Plans): 'Administration' -- 'Billing Setup' -- 'Plans' -- 'Plans' list Page – click on plan name hyperlink or new button 'Plans Details' screen -- 'General' tab -- 'General Information' section.

Functionality 'Before' and 'After' release:

Purpose: The customer wants to use SmartCare's crossover claims process for billing, but also needs the secondary charges to be set to a "Do Not Bill" status.

With the release, a new check box called 'Mark crossover charges to this plan as do not bill' is implemented in the general information section of general tab under plan details screen. When this checkbox is checked under secondary coverage plans, during the Cross Over Billing job process, the system will not allow any cross-over charges to be billed to the secondary coverage plan.



Data Model Changes:

- The column '**MarkCrossoverChargesDoNotBill'** is added in **coverageplans** Table.

Author: Yashas kydalappa

81.Core Bugs # 127070: Plans: The copied 'Billing Codes' from the primary plan to the secondary plan appeared blank under the "Billing Codes" tab.

Release Type: Fix **|** **Priority:** Medium

Pre-requisite:

1. Create a primary Plan and add the new billing codes in the 'Billing Codes' tab under the 'Billing Codes' section of the Plan Detail screen.
2. Create a Secondary Plan and Copy the billing codes from the Primary plan in the 'Billing Codes' tab under 'Template Section' from 'Specified Plan' dropdown under the 'Plan Billing Code Template' pop-up from 'Use This Plan as Template' check box.

Navigation Path: 'Administration' -- 'Billing Set up' -- 'Plans' -- 'Plans' list page – click on the hyperlink of Plan name – 'Plan Detail' screen -- 'Billing Codes' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The copied 'Billing Codes' from the primary plan to the secondary plan appeared blank when the user viewed from the secondary coverage plan.

With this release, the above-mentioned issue has been fixed. Now, the copied Billing Codes from the primary coverage plans are retained when the user tries to view them from the secondary coverage plan.

Primary Care

Reference No	Task No	Description
~~82~~	~~Core Bugs # 127009~~	~~Primary Care note skipping E&M billing pop-up.~~
~~83~~	~~Core Bugs # 127080~~	~~My Calendar Page: Inactive staff is reflected in the 'Provider Dropdown' under the 'New Primary Care Entry' popup.~~

~~**Author:** Sithara Ponnath~~

~~82. Core Bugs # 127009: Primary Care note skipping E&M billing pop-up.~~

~~**Release Type:** Fix **|** **Priority:** High~~

~~**Navigation Path:** 'Client'--Select a client from 'Client Search' pop-up --Go Search --'Medical Progress Note' --Select any 'Template' from the pop-up --click on 'Ok'--Click on the tag 'Order Medications'– Prescribe medications for the client from the launched Rx application – Go back to 'Medical Progress Note' --- Click on 'Save/Sign' button.~~

~~**Functionality 'Before' and 'After' release:**~~

~~Before this release, here was the behavior. The user clicked on the tag 'Order Medications' and launched RX application. Post that, went back to 'Medical Progress Note" and signed. At this point, the EM Code Pop-up failed to load.~~

~~With this release, the above-mentioned issue has been resolved and now, the EM Code Pop-up will be displaying on click of sign button.~~

~~**Author:** Chaitali Patil~~

~~83. Core Bugs # 127080: My Calendar Page: Inactive staff is reflected in the 'Provider Dropdown' under the 'New Primary Care Entry' popup.~~

~~**Release Type:** Fix | **Priority:** Medium~~

~~**Prerequisite:** Enroll to the 'Primary Care Program' through the **path:**~~

~~Go search - 'Administration' – 'Programs' – 'Programs' list page – select a program – 'Program Details' screen – 'General' tab – 'Categories' sub-tab – check the 'Primary Care Program' checkbox.~~

~~**Navigation Path 1:** Go search - 'Administration' – 'Staff/Users'– Filter for the Inactive Staff.~~

~~**Navigation Path 2:** 'Client' Search – Go search – 'My calendar (My Office) – Click to create 'New Primary Care Entry' Icon – 'New Primary Care Entry' Pop up will display – click on 'Provider Name' dropdown Field – Check the 'Active' staff.~~

~~**Functionality 'Before' and 'After' release:**~~

~~Before this release, here was the behavior. Inactive staff was displayed in the 'Provider Name' dropdown under the 'New Primary Care Entry' popup, even though the dropdown for Primary Care appointments was intended to show only active staff with 'Primary Care Program' set to 'Y'.~~

~~With this release, the above-mentioned issue has been fixed. Now, inactive staff are no longer displayed and only active staff with 'Primary Care Program' set to 'Y' are displayed in the 'Provider Name' dropdown under the 'New Primary Care Entry' popup.~~

Procedures/Rates

Reference No	Task No	Description
84	EII # 126599	Changes in the 'Procedure Code details' screen for the Mapping 'Mode of Delivery'.

Author: Roopa Hemanna

84. EII # 126599: Changes in the 'Procedure Code details' screen for the Mapping 'Mode of Delivery'.

Release Type: Change | **Priority:** On Fire

Navigation Path: 'Administration' – 'Procedure/Rates' screen – click on 'New' button -- 'Procedure Code Details' screen – enter mandatory information in General and Rates/Billing codes tab – click on 'Programs/Credentials' tab– go to new section 'Mode of Delivery'.

Functionality 'Before' and 'After' release:

Purpose: To prevent documenting Services with Mode Of Delivery and Procedure choices that are invalid for the Service Procedure, being recorded.

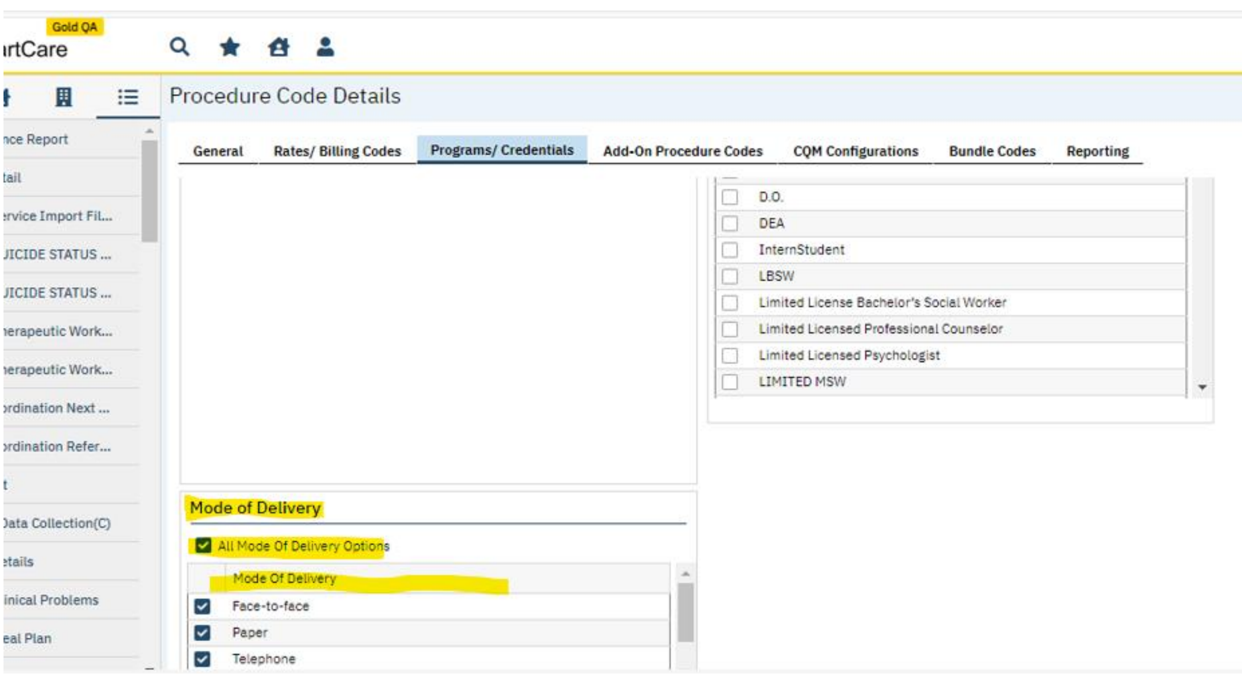
With this release, the below-mentioned changes are implemented in the 'Procedure Code Details' screen.

1. A new 'Mode of Delivery' section and mapping options have been added in the 'Programs/Credentials' tab of the 'Procedure Code Details' screen.

2. A new section 'Mode of Delivery' with Response Type Checkboxes 'All Mode of Delivery Options', ('Face to Face', 'Paper' and Telephone', etc have been added. By default, the "All Mode of Delivery Options" checkbox is checked.

   This section will display all the values from the existing MODEOFDELIVERY" Global Code Category, allowing users to map the 'Mode of Delivery' options that are valid for a particular procedure.

Procedure Code Details' screen:



Data Model Changes:

1. A new **'ProcedureCodeModeOfDeliveries'** table included.

2. The '**AllowAllModeOfDeliveries**' column is added to '**ProcedureCodes**' table.

Programs

Reference No	Task No	Description
85	EII # 126173	A new checkbox 'Create Service on Date of Discharge' has been implemented in the categories section of the general tab under the program details screen.
86	Core Bugs # 127094	Programs: An Error message is displaying when trying to discharge a program.

Author: Yashas Kydalappa

85. EII # 126173: A new checkbox 'Create Service on Date of Discharge' has been implemented in the categories section of the general tab under the program details screen.

Release Type: Change | **Priority:** Medium

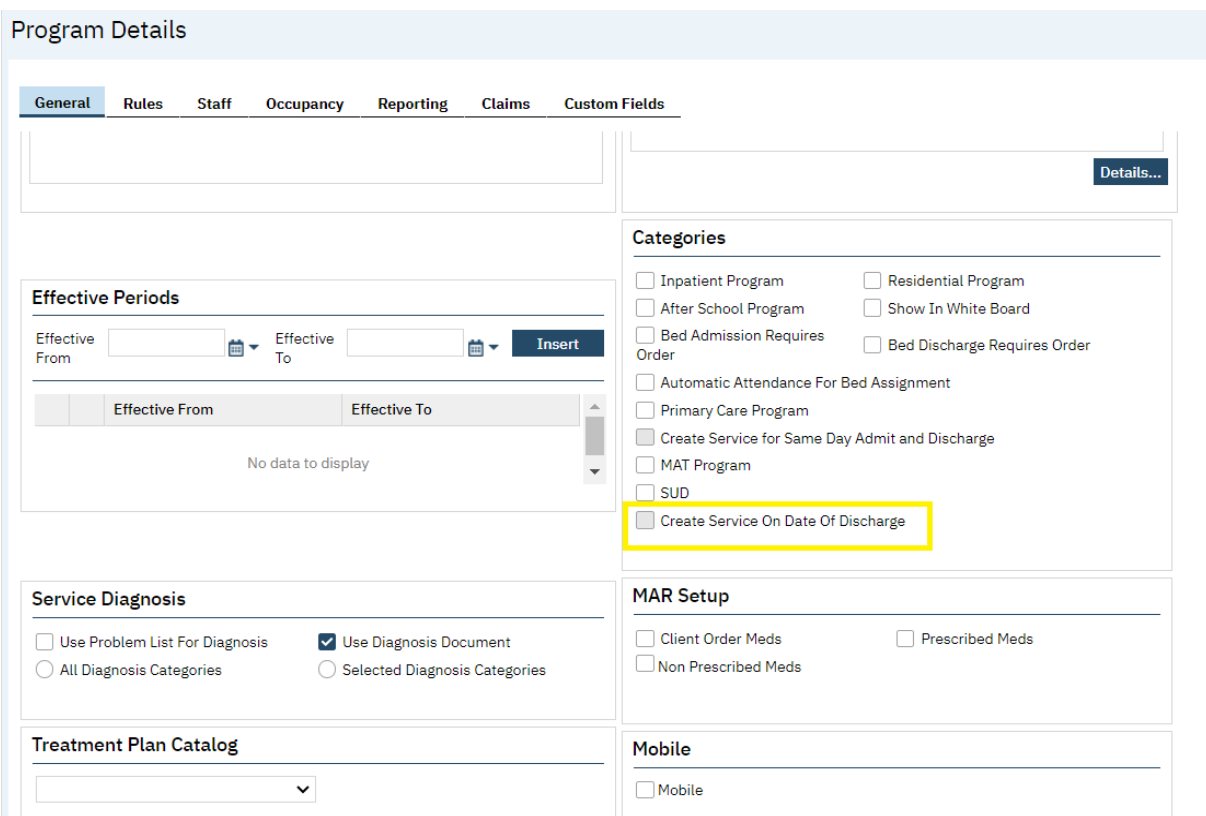
Navigation Path: Go search **-**Programs (Administration)-Programs list Page – Click on the new button- 'Programs Details' screen - 'General' tab - 'Categories' section-'Create Service on Date of Discharge' checkbox.

Functionality 'Before' and 'After' release:

Purpose: There are specific use case scenarios where customers will need to record bed services on the day of discharge.

With the release, a new checkbox 'Create Service on Date of Discharge' has been implemented in the categories section of the general tab under the program details screen.

- By default, the checkbox will be disabled.
- It will be enabled only when the 'Inpatient Program' or 'Residential Program' checkbox is checked in the categories section of the general tab under the program details screen.



Data Model Changes:

The Column 'CreateServiceOnDateOfDischarge' is included in Programs table.

Author: Shivakanth Moger

86. Core Bugs # 127094: Programs: An Error message is displaying when trying to discharge a program.

Release Type: Fix | **Priority:** Medium

Prerequisite: Discharge any program (ex: testProgram) with current date.

Navigation Path: 'Client' search – 'Program Assignment Details' screen - enroll the same program (ex: testprogram) with current date.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user tried to discharge the same enrolled program (ex: testprogram) with a future date, the below-mentioned error message was displayed.

Error Message: "Enrolled Date is overlapping with the existing Discharged Date Range."

With this release, the above-mentioned issue has been resolved. The user can now successfully discharge the program without encountering the above error message with a future date, when that program is enrolled for the current date.

Provider Contract

Reference No	Task No	Description
87	Core Bugs # 127151	Unable to modify the existing contracted rates when more than one exists with same billing code/modifier
88	Core Bugs # 127063	Getting error when entering more than 100 characters in 'Liability Information' Text Box.

Author: Renuka Gunasekaran

87. Core Bugs # 127151: Unable to modify the existing contracted rates when more than one exists with same billing code/modifier.

Release Type: Fix | **Priority:** Medium

Prerequisite: Add same billing code with different License in Provider contract by following the below **Path:**

'My Office' ---'Provider Contracts' -- 'Provider' -- 'Provider Contract' -- 'Contract Details' screen --'Contract rates' tab' -- 'Billing code' field to add contract rate and Map License using 'Specify Associated License Type' field -- Insert -- Add the same billing code and Map different License using 'Specify Associated License Type' field.

Navigation Path: 'My Office' -- 'Provider Contracts' -- 'Provider' -- 'Provider Contract' -- 'Contract Details' screen -- 'Contract rates' tab' -- Select Existing Contract Rate -- Modify the License using 'Specify Associated License Type' field -- 'Modify'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. After insert /modify the contract rates license for the same billing code/modifier combo into a single contract, the user was unable to modify those contract rates.

After this release, the user can modify the contract rates license for the same billing code/modifier combo which has different licenses.

Author: Renuka Gunasekaran

88. Core Bugs # 127063: Getting error when entering more than 100 characters in 'Liability Information' Text Box.

Release Type: Fix | **Priority:** Medium

Navigation Path 1: 'My Office' -- 'Provider Contract' -- select 'Provider'.

Navigation Path 2: Provider -- 'CM credentialing' -- Click on 'New' – 'Credentialing Details' screen -- 'Liability Information' Text Box -- Enter more than 100 characters – save.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Credentialing Details screen, when the user entered more than 100 characters in the 'Liability Information' Text Box and saved it, the following error message was displayed.

Error Message: *String or binary data would be truncated. The statement has been terminated.*

With this release, the above-mentioned issue has been resolved. Now, the 'Liability Information' Text Box is restricted to allowing only 100 characters in the Credentialing Details screen.

QuickLinks

Reference No	Task No	Description
89	Core Bugs # 127246	Client Abbreviated Notes Report' not displaying client data when made as QuickLinks.
90	Core Bugs # 127233	Client Search Quicklinks display issue.

Author: Rakesh Naganagoda

89. Core Bugs # 127246: 'Client Abbreviated Notes Report' not displaying client data when made as QuickLinks.

Release Type: Fix | **Priority**: Medium

Navigation Path 1: Login to SmartCare – Go Search - Client Abbreviated Notes Report (Client) Quicklinks.

Navigation Path 2: Login to SmartCare -Go Search- Client Abbreviated Notes Report (Client).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user made 'Client Abbreviated Notes Report' as a QuickLink, and opened Client Abbreviated Notes Report, then no client data was populated in the report. Also, when the user tried to create favorite with Null date values, the below mentioned error message was displayed.

Error Message: Please enter a value for the parameter 'StartDate'. The parameter cannot be blank.

With this release, the above-mentioned issue has been resolved. Now the user can open the report as a QuickLink and the client data populated properly without any error message. Also, the user is able to create favorite with Null date values without any error message.

Author: Kiran Tigarimath

90. Core Bugs # 127233: Client Search Quicklinks display issue.

Release Type: Fix | **Priority:** Medium

Prerequisite:

1. 'Grant/Deny' the permission for staff through the **Path:**

   'Administration' – 'Staff/Users' list page -- click on a staff name hyperlink -- 'Staff/Users' Detail page -- 'Roles/Permissions' tab – select the Permission Type as 'Quicklinks' – Apply filter – Grant/Deny By Role -- Save.

2. 'Grant/Deny' the permission through the 'Role Definition' screen:

   'Administration' - 'Role Definition' - Role Definition' detail screen – Select a Role – 'Quicklinks' – Grant/Deny By Role.

Navigation Path: 'Search for a client' - 'Hover on Client' - 'Quicklinks'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The granted quicklinks were not displayed for a client as client search quicklink even though the quicklink was granted under 'Roles/Permissions' tab of 'Staff Details' screen and the same quicklink denied under 'Role Definition' screen for a role and vice versa.

With this release, the above-mentioned issue has been resolved. Now, the granted quicklinks under 'Staff Details' screen and the same quicklinks denied under 'Role Definition' screen are displayed as client search quicklink, and the denied quicklinks under 'Staff Details' screen and granted quicklink under 'Role Definition' screen will not display as Client search quicklink.

Reception

Reference No	Task No	Description
91	Core Bugs # 127002	Alignment Issue in the Client Information box in the Reception screen.
92	Core Bugs # 127142	Performance issue in the Reception screen.
93	Core Bugs # 127149	'Reception': The screen automatically scrolls to the bottom after an Auto-Refresh.

Author: Niroop Hassan

91. Core Bugs # 127002: Alignment Issue in the Client Information box in the Reception screen

Release Type: Fix | **Priority:** Medium

Navigation Path: Go Search - Reception / FrontDesk (My Office) - Reception/Front Desk - click on 'i' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked on "i" icon on the Reception screen, the information in the Client Information box was misaligned.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on "i" icon on the Reception screen, the information in the Client Information box in the Reception screen, aligns properly.

Author: Niroop Hassan

92. Core Bugs # 127142: Performance issue in the Reception screen.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: Go Search – Reception/Front Desk (My Office).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to open Reception screen, it was taking more time to load.

With this release, the above-mentioned issue has been resolved. Now, the Reception screen is loading without any performance issue.

Author: Niroop Hassan

93. Core Bugs # 127149: 'Reception': The screen automatically scrolls to the bottom after an Auto-Refresh.

Release Type: Fix | **Priority:** Medium

Navigation Path: 'My Office' – 'Reception' – 'Reception' list page.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. Whenever the 'Reception' list page underwent an 'Auto-Refresh', the screen was automatically scroll down to the bottom of the list page.

With this release, the above issue has been resolved. Now, the screen remains in the same position even after an 'Auto-Refresh' has occurred.

Reports

Reference No	Task No	Description
~~94~~	~~EII # 124358~~	~~DFA Report: Implementation of new 'MAT Destroyed Inventory by Bottle' report for destroyed medication.~~

~~**Author:** Sithara Ponnath~~

~~94. EII # 124358: DFA Report: Implementation of new 'MAT Destroyed Inventory by Bottle' report for destroyed medication.~~

~~**Release Type:** New Functionality **|** **Priority:** Urgent~~

~~**Navigation Path 1:** 'My Office' menu --- 'Medication Inventory Transaction' screen - Click on 'Quantity' hyperlink for respective Medication/Lot #/Bottle/Box # - Select 'New' icon - Search and select 'Medication/Strength' (Observe Quantity and Location that are listed match the correct bottle) – Select 'Transaction Type' as 'Adjustment' - Select 'Lot # from dropdown - Select Bottle/Box # from dropdown – Select 'Reason' as 'Destroy' – Observe 'Quantity' - Type optional Comment --- Click on 'Save' button.~~

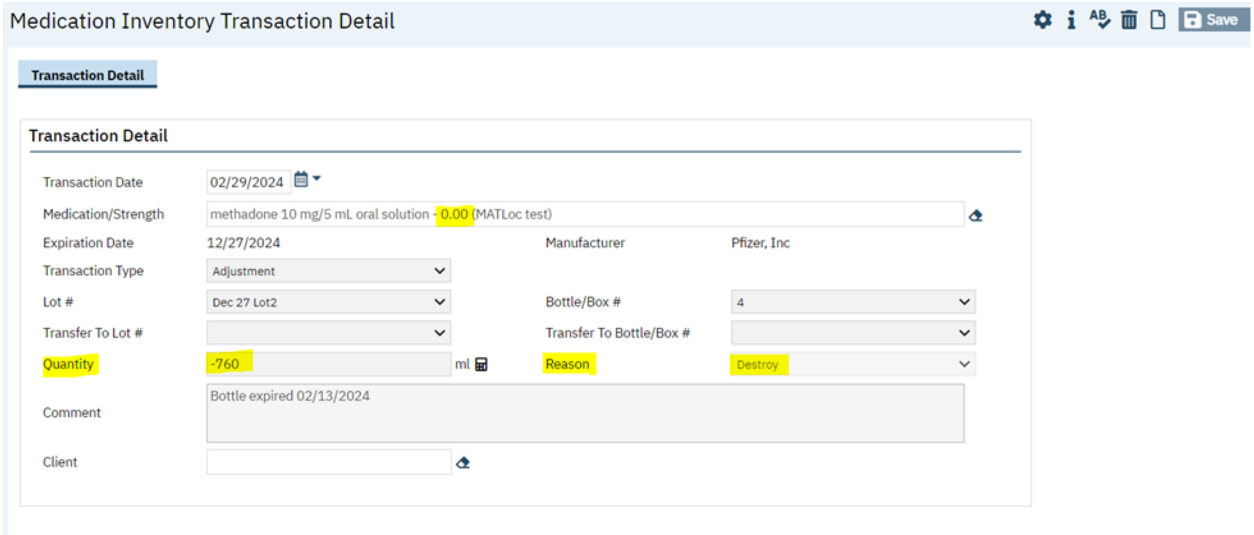
~~**Navigation Path 2:** 'Reports'--- 'MAT Destroyed Inventory by Bottle' report --- Enter 'Start Date' and 'End Date' --- Select a 'Location' --- Click on the 'View Report' button.~~

~~**Functionality 'Before' and 'After' release:**~~

~~**Purpose:** This report is to display the destroyed medications that are captured from the Medication Inventory Transaction Detail screen.~~

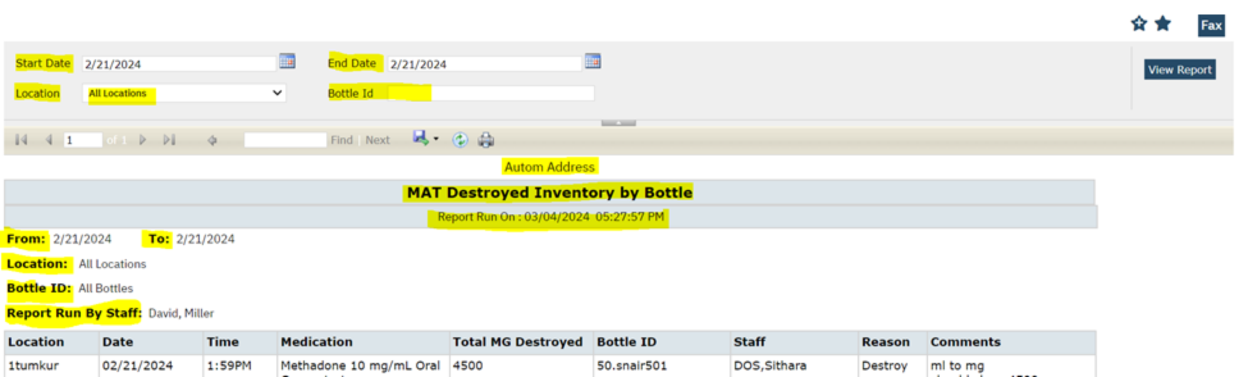
~~With this release, a new report 'MAT Destroyed Inventory by Bottle' has been implemented which will display the destroyed medications from the 'Medication Inventory Transaction' screen, where its transaction type is 'Adjustment' and the reason is 'Destroy'. **Refer to the below screenshots.**~~

~~**Screenshot 1: 'Medication Inventory Transaction' screen of a destroyed medication.**~~



~~For the 'MAT Destroyed Inventory by Bottle' report, the below sections will be displayed:~~

1. ~~Filter section~~
2. ~~Header~~
3. ~~Sub Header~~
4. ~~Grid~~



~~**1. Filter section:** This section consists of the below-mentioned fields:~~

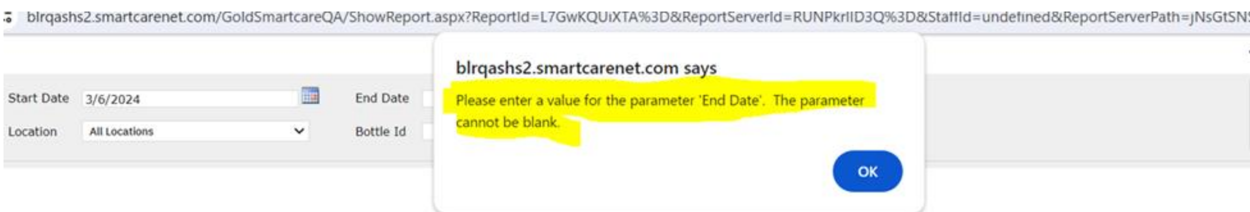
- ~~Start Date~~
- ~~End Date~~
- ~~Location~~
- ~~Bottle Id~~

~~**Start Date:** This will pull the transaction data for all MAT medication transactions where 'TRANSACTIONTYPE' = 'Adjustment' with 'MEDTRANSACTIONREASON' = 'Destroy' from this date and it's a required field. The field will be defaulted to 'Today's Date'. The below validation message will be displayed when the start date is blank.~~

~~**Validation Message:** 'Please enter a value for the parameter 'Start Date'. The parameter cannot be blank.'~~

~~**End Date:** This will pull the transaction data for all MAT medication transactions that are TRANSACTIONTYPE = "Adjustment" with MEDTRANSACTIONREASON = "Destroy" to this date and it's a required field. The field will be defaulted to 'Today's Date'. The below validation message will be displayed when the End date is blank.~~

~~**Validation Message:** 'Please enter a value for the parameter 'End Date'. The parameter cannot be blank.'.~~



~~**Location:** This drop-down will pull all the locations of the MAT medication bottle and it's a required field. The field will be defaulted to 'All Locations'.~~

~~**Bottle Id:** This is a textbox, and the user can specify a 'Bottle Id' here and only that Bottle ID record will display on the report. The field will be defaulted to 'Blank', and it will pull all the bottle IDs.~~

~~**2. Header Section**: This section consists of the below-mentioned fields:~~

~~**Address:** This will display the agency 'Address'.~~

~~**Report Name:** This will display the report name 'MAT Destroyed Inventory by Bottle'.~~

~~**Report Run On:** This displays the Date and Time when the report was run. This should be in DD/MM/YYYY HH:MM: SS format.~~

~~**3. Sub-header Section:** This section consists of the below-mentioned fields:~~

~~**From:** This field will display the start date that is selected from the filter which is in the format 'MM/DD/YYYY'.~~

~~**To:** This field will display the end date that is selected from the filter which is in the format 'MM/DD/YYYY', will be displayed on the same row.~~

~~**Location:** This field will display the 'Location' selected from the filter.~~

~~**Bottle ID:** This field will display the 'Bottle ID' selected from the filter. The defaulted value is 'All Bottles'.~~

~~**Report Run by:** This field will display the name of the Staff who is logged into 'SmartCare' application and generates the report.~~

~~**Fields of 'MAT Destroyed Inventory by Bottle' report on the 'Grid' section with default values for Location and Bottle Id filter fields.**~~

Start Date 2/21/2024 End Date 2/21/2024 View Report

Location All Locations Bottle Id

Find Next

Autom Address

MAT Destroyed Inventory by Bottle

Report Run On : 03/04/2024 05:27:57 PM

From: 2/21/2024 **To:** 2/21/2024

Location: All Locations

Bottle ID: All Bottles

Report Run By Staff: David, Miller

Location	Date	Time	Medication	Total MG Destroyed	Bottle ID	Staff	Reason	Comments
1tumkur	02/21/2024	1:59PM	Methadone 10 mg/mL Oral Concentrate	4500	50.snair501	DOS,Sithara	Destroy	ml to mg should show 4500 mg on report.
1tumkur	02/21/2024	4:13PM	methadone 10 mg/5 mL oral solution	1000	52.snair502	DOS,Sithara	Destroy	expired medication
Totals:				5500				

Page 1 of 1

~~**4. Grid Section:** This section consists of the below-mentioned fields:~~

~~**Location:** This field will display the 'Location' of Bottle for the corresponding adjustment transaction where the 'MEDTRANSACTIONREASON' is set to 'Destroy'.~~

~~**Date:** This will display the 'Date' for the corresponding adjustment transaction where the 'MEDTRANSACTIONREASON' is set to 'Destroy'. This date corresponds to the 'Date' when the staff saved the 'MEDTRANSACTIONREASON' as 'Destroy' in the 'Transaction Detail' of the 'Medication Inventory Transaction Detail' Screen.~~

~~**Time:** This will display the 'Time' of the destroyed transaction. The time saved in this entry is the time of the destroyed transaction when the 'MEDTRANSACTIONREASON' = "Destroy" in the 'Transaction Detail' of the 'Medication Inventory Transaction Detail' screen.~~

~~**Medication:** This will display the 'Medication Description' (Medication/Strength of transaction).~~

~~**Total MG Destroyed:** This will display the 'QUANTITY' of medication that is removed from Inventory to zero out bottle. This is the Quantity of TRANSACTIONTYPE = "Adjustment" with MEDTRANSACTIONREASON = "Destroy". If the 'Quantity' given is in 'ML' amount, it will be converted to 'MG' and displayed on the report.~~

~~**Total MG Destroyed** is calculated by the formula as below:~~

~~**Example:**~~

~~**Medication:** Methadone Liquid~~

~~**Strength:** 10mg/mL, Conc, Oral~~

~~**Amount Destroyed:** 5mL~~

~~**Convert to MG:** 50mg~~

~~(10mg/mL x 5mL = 50mg~~

~~Medication Strength x Quantity ML Destroyed = Quantity MG Destroyed~~

~~(10mg/mL x 5mL = 50mg)~~

~~**Additional Format examples:**~~

~~10mg/5mL: (10mg = 5mL); (20mg = 10mL)~~

~~5mg/5mL: (5mg = 5mL); (10mg = 10mL)~~

~~10mg/mL: (10mg = 1mL); (20mg = 2mL)~~

~~**Bottle ID:** This will display the Bottle ID (Format: Bottle/Box #.Lot #) of the bottle that is destroyed (where MEDTRANSACTIONREASON= "Destroy" in the Medication Inventory Transaction detail screen).~~

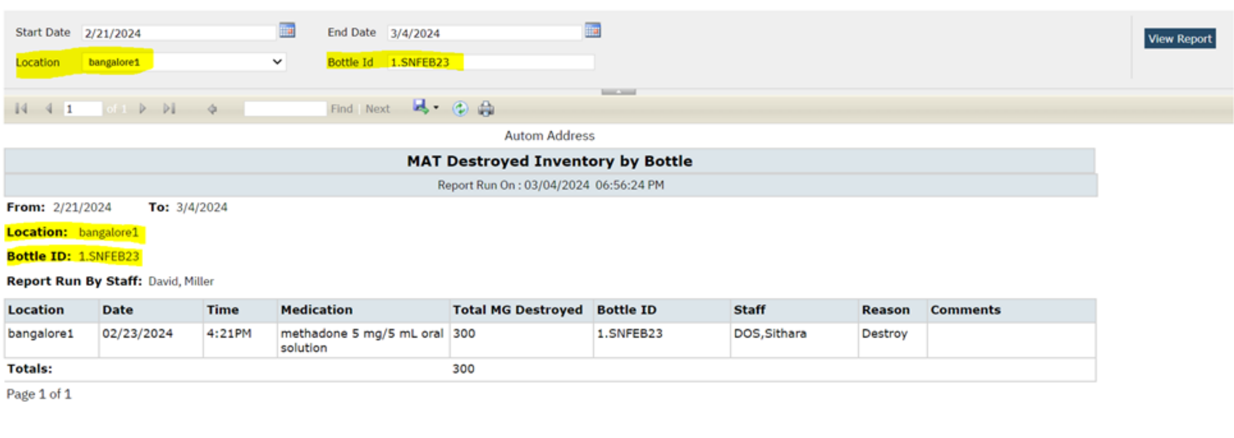
~~**Staff:** This will display the 'Staff Name' who submitted the MEDTRANSACTIONREASON = "Destroy" in the 'Medication Inventory Transaction Detail' screen.~~

~~**Reason:** This will display the 'Reason' as 'Destroy' in the column of the grid.~~

~~**Comments:** This will display the 'Comment' entered from the corresponding 'MEDTRANSACTIONREASON' = Destroy' in the \'Medication Inventory Transaction Detail' screen.~~

~~**Totals:** This is the total of all values in the 'Total MG Destroyed' column. This will be displayed as the last row on the last page of the report.~~

~~**Fields of 'MAT Destroyed Inventory by Bottle' report on the 'Grid' section with selected filters.**~~


Start Date 2/21/2024 End Date 3/4/2024

Location bangalore1 Bottle Id 1.SNFEB23

View Report

Find | Next

Autom Address

MAT Destroyed Inventory by Bottle

Report Run On : 03/04/2024 06:56:24 PM

From: 2/21/2024 **To:** 3/4/2024

Location: bangalore1

Bottle ID: 1.SNFEB23

Report Run By Staff: David, Miller

Location	Date	Time	Medication	Total MG Destroyed	Bottle ID	Staff	Reason	Comments
bangalore1	02/23/2024	4:21PM	methadone 5 mg/5 mL oral solution	300	1.SNFEB23	DOS,Sithara	Destroy	
Totals:				300				

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Rx Application

Reference No	Task No	Description
95	EII # 126837	RX: Changes in the 'Save As Template' feature to include 'Instruction Text'.
96	Core Bugs # 126968	Rx Application - Prescribers having issues with weekly/monthly medication directions.
97	Core Bugs # 127113	Rx: validation is displaying when trying to reorder medication.
98	Core Bugs # 127154	Rx not showing Outbound Prescriptions even when prescriber proxy.

Author: Rajgopal Yajurvedi

95. EII # 126837: RX: Changes in the 'Save As Template' feature to include 'Instruction Text'.

Release Type: Change | **Priority**: Urgent

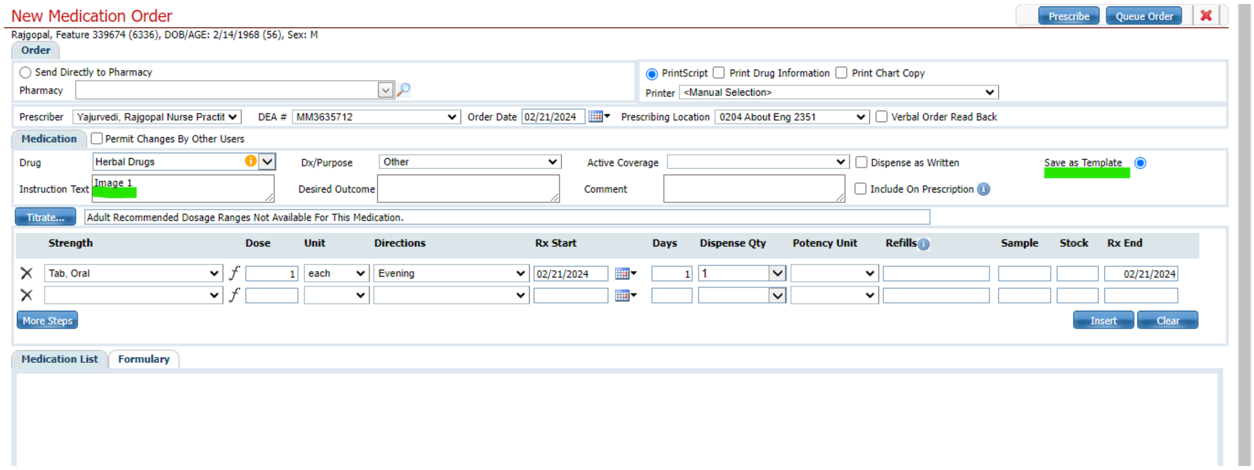
Navigation Path: Login to the 'SmartCare' application - 'Client' search – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Search and Select the drug with starting three letters – Fill all required fields - Fill the 'Instruction Text' text box - Select 'Save as Template' radio button – click on 'Insert' button – click on 'Prescribe' button– 'Prescribe' page - 'Prescribe' button – 'Patient Summary' page - Click 'New Order' button – New Medication Order Page - Search and Select the same above drug with starting three letters - Above added instruction text is displayed in 'Instruction Text' text box.

Functionality 'Before' and 'After' release:

Before this release, here was behavior. In 'Rx' Application, in the 'New Medication Order' page, when the prescriber inserted the medication by selecting the 'Save as Template' radio button, the 'Instruction Text' was not saved as part of the template. This has resulted in the 'Instruction Text' text not being auto-filled when the same medication was selected later.

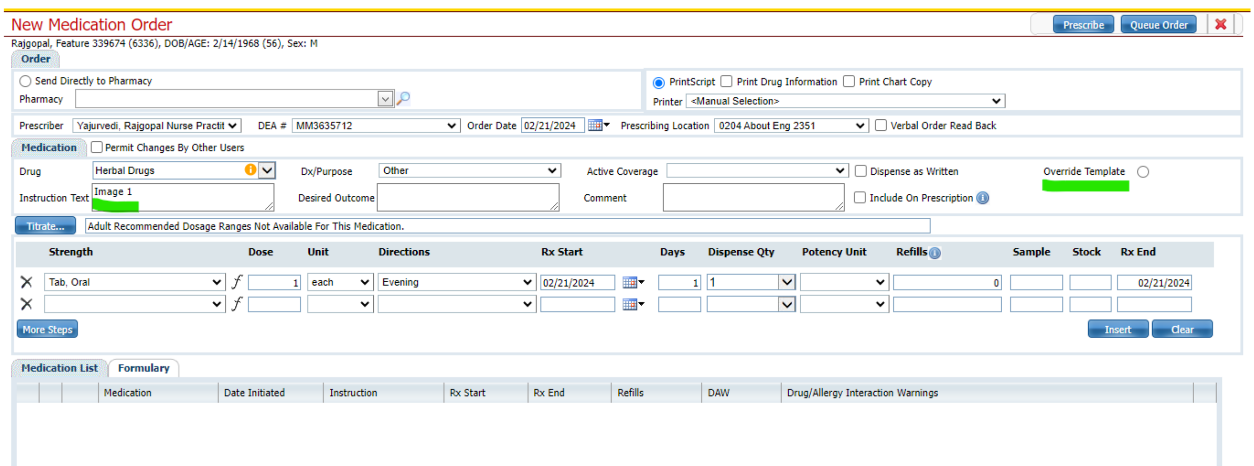
With this release, when the prescriber enters text in the 'Instruction Text' textbox and selects the 'Save as Template' radio button, the entered text is saved as part of the template. This ensures that the 'Instruction Text' is associated with the template and is auto-filled the next time when the prescriber selects the same medication. Refer to the below screenshot:

On selecting the 'Save as Template' radio button:



Additionally, the text in the 'Instruction Text' textbox will be saved in the **'SpecialInstructions' column** under the **'DrugOrderTemplates' table** and updated when the prescriber chooses the 'Override Template' radio button. Refer to the below screenshot:

On selecting the 'Override Template' radio button:



Data Model Changes:

The 'SpecialInstructions' column added In 'DrugOrderTemplates' table.

Author: Rajgopal Yajurvedi

96. Core Bugs # 126968: Rx Application - Prescribers having issues with weekly/monthly medication directions.

Release Type: Fix | **Priority:** Medium

Prerequisite:

- The Client is enrolled in a Program by following the below **Path:**

Login to SmartCare Application -- 'Client' -- Search and Select the Client -- Programs -- 'Program Assignment' -- Click 'New' -- Program Assignment Details -- Select the Program -- Enroll the program for a client.

- Staff has verbal order, approve requests for the client where the client's enrolled program has 'MAR setup' and 'Prescribed Meds' check box is not selected. Please follow the below **Path for this setup**:

  Login to SmartCare Application -- 'Client' -- Search and Select the Client -- 'Administration' -- Programs -- Search Program -- Apply Filter -- Select the Program hyper link -- Program Details -- 'MAR Setup' section -- Unselect 'Prescribed Meds' check box -- 'Medication Management Rx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Fill all required fields -- Select the other prescriber -- Prescribe.

Navigation Path 1: Login to SmartCare Application -- 'Administration' -- Programs -- Search Program -- Apply Filter -- Select the Program hyper link -- Program Details -- 'MAR Setup' section -- Select 'Prescribed Meds' check box.

Navigation Path 2: Login to SmartCare Application -- 'Client' -- Search and Select the Client -- 'Medication Management Rx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page - Select the Drug with starting three letters -- Fill all required fields -- Select Direction as 'Weekly/Monthly' -- 'Select Days of Week' popup.

Navigation Path 3: Login to SmartCare Application -- 'Administration' -- Programs -- Search Program --Apply Filter -- Select the Program hyper link -- Program Details -- 'MAR Setup' section -- Select 'Prescribed Meds' check box -- My Office -- Medication Management -- Rx Application -- Start Page -- Click 'Verbal order' button -- Verbal Order approval page -- Select the Medication radio button -- Click Approve button -- Enter the password -- Click Sign button.

Functionality 'Before' and 'After' release:

Before this release, here was behavior.

1. In the SmartCare application, when a Client is enrolled in a program with the 'MAR Setup' section and if the Verbal order was placed when the 'Prescribed Meds' check box was unselected and the check box is selected before the approving the verbal order.

   Then in the Rx application, while approving the verbal order, the below validation message was displayed and this was restricting the users to approve the verbal orders.

Validation Message: "Dispense days are required for week and month based orders."

2. In the SmartCare application, when a Client is enrolled in a Program with a 'MAR Setup' section where the 'Prescribed Meds' check box is selected. In the Rx Application, when the user was prescribing the medication with the direction 'Weekly/Monthly', then the "Select days for a week" popup was showing for all the clients.

With this release, the above mentioned issues are resolved as below:

1. The validation "Dispense days are required for week and month-based orders." is removed for the above verbal order scenario.
2. In the New Medication Order screen, when the user selects the direction as 'Weekly/Monthly', then a "Select days for a week" popup will be displayed for the client, whose enrolled program has a 'MAR Setup' section and the 'Prescribed Meds' check box is selected.

Note: This fix applies to specific customers, who are mapped with MAR Setup.

Author: Rajgopal Yajurvedi

97. Core Bugs # 127113: Rx: validation is displaying when trying to reorder medication

Release Type: Fix **|** **Priority:** High

Prerequisite:

1. System configuration key 'SWITCHRXMEDICATIONCONSENTOFF' is set as 'Yes'.
2. The Medication is prescribed and listed in Medication list in Patient Summary Page through the below **Path:**

Login to SmartCare Application - 'Client' – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Search and Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button – Select the Pharmacy/Print – click on 'Prescribe' button – Prescribe page – 'Prescribe' button – 'Patient Summary' page.

Navigation Path: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Select the Medication in Medication List – Click Re-order button – Re-Order Medication Order Page

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When system configuration key 'SWITCHRXMEDICATIONCONSENTOFF ' was set to Yes and when the user tried to Re-Order Medication, the below mentioned validation message was displayed:

Validation Message: 'One or more medications does not have a current consent'

Note: When system configuration key 'SWITCHRXMEDICATIONCONSENTOFF ' was set to Yes/No Value, then configuration key behavior was not working as expected.

With the release, the above-mentioned issues have been resolved. Now, the SWITCHRXMEDICATIONCONSENTOFF values are updated to Y and N. And the previous Yes/No values are not considered.

When the system configuration key 'SWITCHRXMEDICATIONCONSENTOFF ' value is set to Y and when the user tries to Re-Order Medication, the validation message is not displaying in 'Re-Order Medication Order' page.

When the system configuration key 'SWITCHRXMEDICATIONCONSENTOFF ' value is set to N and when the user tries to Re-Order the Medication, the validation message will be displayed.

Author: Rajgopal Yajurvedi

98. Core Bugs # 127154: Rx not showing Outbound Prescriptions even when prescriber proxy.

Release Type: Fix **|** **Priority:** Medium

Prerequisite:

- Staff name is added in the Prescriber Proxy section in the 'Proc/Prog/Loc/Proxy/Supervisor' tab of 'Staff Details' screen.
- Staff who got added as Prescriber Proxy, he/she is the one who logs in and checks the prescription of the staff (who added him/her).

Navigation Path: 'My Office' -- 'Medication Management' -- Rx Application -- Start Page -- Click on 'Outbound Prescriptions' tab.

Functionality 'Before' and 'After' release:

Before this release, here was Behavior. When the 'Prescriber Proxy'(staff) was logged in to Rx Application and selected 'All' or Prescriber (staff who added the Prescriber Proxy staff) in the 'Prescriber' dropdown under the 'Outbound Prescriptions' tab, the records were not displayed on the start Page.

With this release, the above-mentioned issue has been resolved. Now, when the 'Prescriber Proxy'(staff) selects the Prescriber (staff who added the Prescriber Proxy staff) or 'All' in the 'Prescriber' dropdown, the relevant records are displayed on the start Page.

SAML (Single Sign On)

Reference No	Task No	Description
99	Core Bugs # 127147	SmartKey inputs inconsistent in number of characters they accept for SAML user in the document signature pop up.

Author: Kiran Tigarimath

99. Core Bugs # 127147: SmartKey inputs inconsistent in number of characters they accept for SAML user in the document signature pop up.

Release Type: Fix **|** **Priority:** Medium

Navigation Path: 'SSO Login' - 'Select any document' - 'Sign'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a SAML user tried to sign the document using Smartkey in document signature popup, it was accepting more than 6 characters when compared to Smartkey field in Staff Details screen.

With this release, the above-mentioned issue is resolved. Now, the SAML user can enter only 6 characters in the document signature popup in the Smartkey field.

Scanning

Reference No	Task No	Description
100	Core Bugs # 127145	Unable to upload EOB in Payment/Adjustments for non admin staff.
101	Core Bugs # 127104	Staff able to see batch scanned documents for the denied Clients. Staff able to see batch scanned documents for the denied Clients.

Author: Lavanya Gowdru

100. Core Bugs # 127145: Unable to upload EOB in Payment/Adjustments for non admin staff.

Release Type: Fix **|** **Priority:** Medium

Prerequisite: Login as non admin staff without Foster Referrals permission through the **Path:**

Go Search – Staff/Users (Administration– select a non admin staff – Staff Details – Roles/Permissions tab – select Image Associations in Select Permission Type… dropdown – Apply Filter – Deny permission for 'Foster Referrals' Permission Item.

Navigation Path: Go Search – Payment/Adjustments (My Office) – click on Add EOB… button – Payment EOB pop up – click on Upload button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a non-admin user without Foster Referrals permission, tried to upload EOB files in Payment/Adjustments, there was a performance issue and continuous processing was displayed.

With this release, the above-mentioned issue has been resolved. Now, a non-admin user without Foster Referrals permission is able to upload EOB files in Payment/Adjustments without any performance issue.

Author: Lavanya Gowdru

101. Core Bugs # 127104: Staff able to see batch scanned documents for the denied Clients.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Fix **|** **Priority:** High

Prerequisite:

The user needs to perform the Batch Scan and Batch Upload by enabling the CDAG.

- The System configuration key "DisplayCDAGSectionInStaffDetails" value is set to 'Yes'.
- The System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
  1. Log into the application with Staff 1, who is associated with one CDAG.

2. Open **Client1** and create Batch Scan and Upload the records, through the **Path:** 'My Office/Client1 -- Scanning -- Start Batch Upload/Start Batch Scan -- Upload/scan the records -- Enter the required values -- 'Save'.
3. Open **Client2** and create Batch Scan and Uploaded records, through the **Path: '**My Office/Client2 --- Scanning --- Start Batch Upload/Start Batch Scan --- Upload/scan the records --- Enter the required values --- Save'.
4. Sign the 'Internal Consent Management (MH)' for **Client1**.
5. Log out from **Staff 1** and log into the application with **Staff 2** who is associated with another CDAG.
6. Deny the **Client 2** under 'Staff/Users -- Staff Details -- Client Access Overrides -- the Add client 2 in the Denied Clients'.

Navigation Path 1: My Office -- Scanning – 'Scanned Medical Records' screen -- Click on the records created through Batch Scan/Batch Upload for **Client1** – Observe the denied client records.

Navigation Path 2: Client -- Scanning -- Click on the records created through Batch Scan/Batch Upload for **Client1** – Observe the denied client records.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Staff was able to see batch scanned documents for Clients who were denied access from Staff Details > Denied Clients.

With this release, the above-mentioned issue has been resolved. Now, the staff cannot see any batch scanned documents for the Denied Client.

Services

Reference No	Task No	Description
102	EII # 125450	Service and Service/Notes screen: Implementation for Mapping Mode of Delivery to Location and Procedure code details which has been set up through the 'ServiceDropdownConfigurations' table.
103	EII # 126172	Add the ability to record bed services.
104	Core Bugs # 126943	Multiple services were getting created when nightly job runs.
105	Core Bugs # 127115	Staff can select Programs of Type 'No Episode' even though they don't have it in Staff Details.

Author: Suganya Sivakumar

102. EII # 125450: Service and Service/Notes screen: Implementation for Mapping Mode of Delivery to Location and Procedure code details which has been set up through the 'ServiceDropdownConfigurations' table.

Release Type: New Functionality | **Priority:** On Fire

Prerequisite: The System Configuration Key "ShowCoreModeOfDeliveryField" value is set to "Yes".

Navigation Path 1: 'Administration' --- 'Procedure/Rates'--- Click on 'New' Icon --- 'Procedure Detail' Screen --- Navigate to 'program/Credentials' tab --- In the 'Mode of Delivery' Section --- 'Verify All Mode of Delivery options' checkbox selected --- Enter all the required Fields --- Click on 'Save'.

Navigation Path 2: 'Administration' --- 'Locations' --- Click on 'New' Icon --- 'Location Detail' screen --- Navigate to 'Mode of Delivery' tab --- In the 'Mode of Delivery' Section --- Verify All 'Mode of Delivery options' checkbox selected --- Enter all the required Fields --- Click on Save.

Navigation Path 3: 'Client' Search --- Select a Client --- Navigate to 'Services' --- 'Client' Menu --- Click on 'New' Icon --- 'Service Detail' Page --- Enter all the required fields --- Select the 'Procedure and Location' --- According to the mapping of "MODEOFDELIVERY' in the 'ServiceDropdownConfigurations' **table ---** Click on 'Save' Icon.

Navigation Path 4: 'Client' Search --- Select a Client --- Navigate to 'Services/Notes' --- 'Client' Menu --- Click on 'New' Icon --- 'Service/Note Detail' Page --- Enter all the required fields --- Select the 'Procedure and Location' --- According to the mapping for 'MODEOFDELIVERY' in the ServiceDropdownConfigurations **table ---** Click on 'Save' Icon.

Functionality 'Before' and 'After' release:

Purpose: To map the 'Mode of Delivery' options for the selected 'ProcedureCodeId' and/or 'LocationId' based on the 'Service' dropdown configuration.

With this release, the following implementation has been done for the 'Mode of Delivery' options that mapped to the selected 'ProcedureCodeId' and/or 'LocationId' based on the 'Service' dropdown configuration.

There are a few scenarios where the Mode of Delivery field will display the values in the Service and Service/Notes screen.

1. If the ModeOfDeliveryFilteredby column is blank in the 'ServiceDropdownConfigurations' table, all Mode of Delivery options will be displayed from the GlobalCode Category "MODEOFDELIVERY".

2. If the ModeOfDeliveryFilteredby column is set to "ProcedureCodeId", then the Mode of Delivery options mapped to the selected Procedure Code will be displayed.

3. If the ModeOfDeliveryFilteredby column is set to "LocationId", then the Mode of Delivery options mapped to the selected Location will be displayed.

4. If the ModeOfDeliveryFilteredby column is set to 'ProcedureCodeId' and 'LocationId', then the 'Mode of Delivery' options that are common to both will be displayed.

Data Model Change: Added the following columns to the existing table 'ServiceDropdownConfigurations'.

1. ModeOfDeliveryFilteredby

2. ModeOfDeliveryUsesSharedTable

3. ModeOfDeliverySharedTableStoredProcedure

4. ModeOfDeliveryStoredProcedure

Note: This is a backend implementation for EII #126598 and EII #126599.

Author: Yashas Kydalappa

103. EII # 126172: Add the ability to record bed services.

Release Type: Change | **Priority:** Medium

Prerequisite:
1. The following checkboxes are checked in the categories section of the general tab under the program details screen.

- Either 'Inpatient Program' or 'Residential Program'
- 'Automatic Attendance For Bed Assignment'
- 'Create Service on Date of Discharge'

2.The Client is enrolled with the program.

3.The Client is admitted to the bed board.

Note: Execute ssp_SCCreateServicesBedAssignments Job.

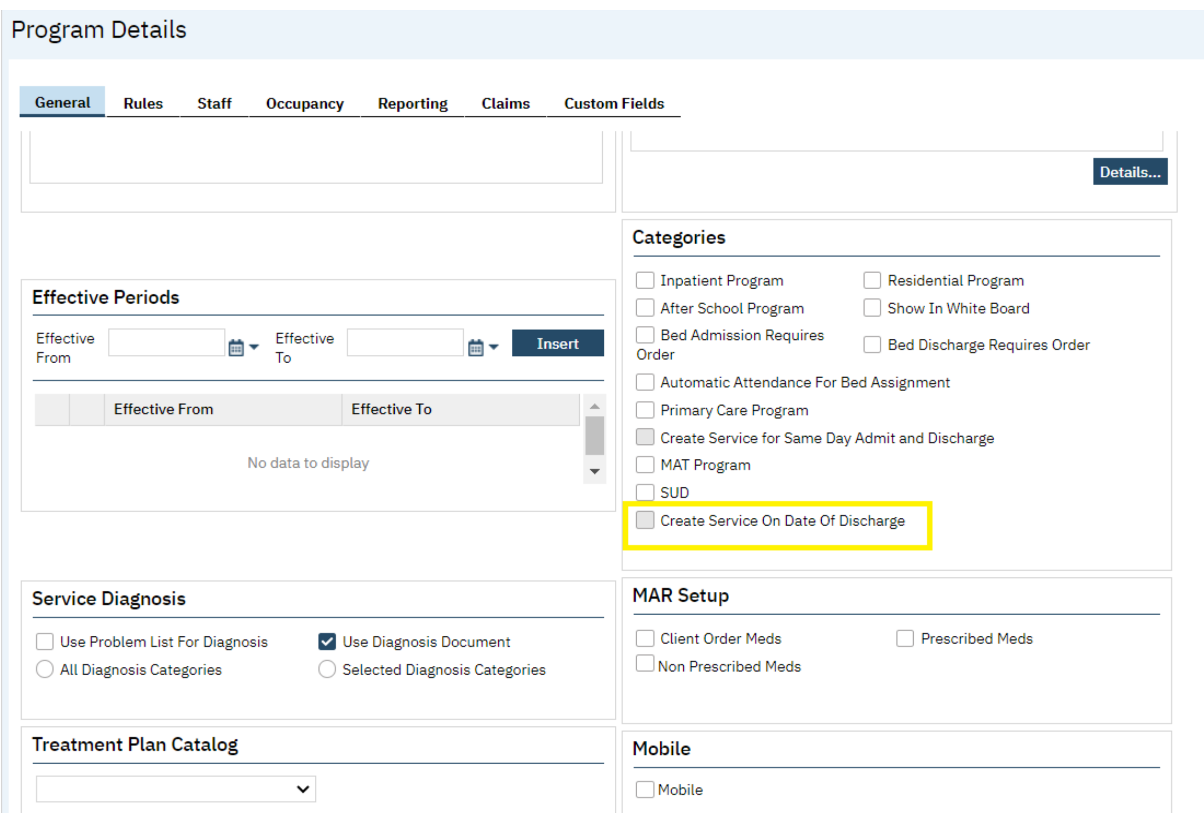
Navigation Path: Select a client -Services (Client-)Services' list page.

Functionality 'Before' and 'After' release:

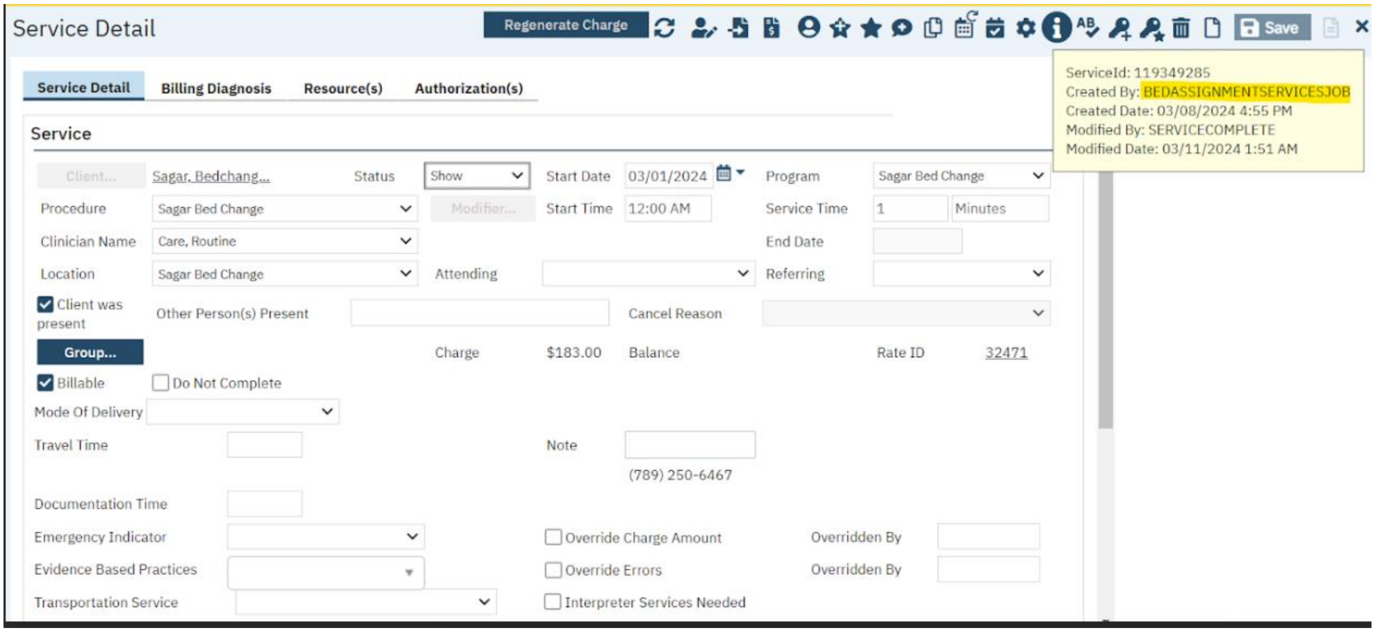
With the release, the 'ssp_SCCreateServicesBedAssignments' Job has been updated to create bed services for both 'Same Day Admit/Discharge' and 'Create Service for Date of Discharge' scenarios.

1.The ssp_SCCreateServicesBedAssignments job will create a 'Bed Service' when the 'Create Service on Date of Discharge' checkbox has been checked in the program details screen.

Program Details Screen:



Service Details Screen:



2. The Bed services will be created for the ‘Discharge, Transfer and Bed Change’ statuses in the Bedboard.

3. If the client is moving from one bed to another bed, then the job only creates the Bed Service where the client is leaving from the bed and will not create a service for the bed, if the client is moving to on the same day.

Author: Namratha Nagaraj

104. Core Bugs # 126943: multiple services were getting created when nightly job runs.

Release Type: Fix | **Priority:** Medium

Navigation Path 1: ‘Administration’ -‘Procedure/Rates’- click on 'Procedure'--click on 'Bundled codes' hyperlink--Select 'Weekly' from 'Frequency' dropdown--Click on 'Save- button.

Navigation Path 2: ‘My Office’ -‘Services’- click on new icon-‘Services Details’ page—Enter required fields-- click on ‘Save’ icon.

Functionality ‘Before’ and ‘After’ release:

Before this release, here was the behavior. When the user ran the nightly job (ssp_SCJobToCreateBundledServices) and if the procedure was having multiple rates added, then the multiple bundled services were getting created.

With this release, the above-mentioned issue is resolved. Now, when the nightly job runs and if the procedure is having multiple rates added, only one bundled service is created.

Author: Aishwarya Bommaklar

105. Core Bugs # 127115: Staff can select Programs of Type 'No Episode' even though they don't have it in Staff Details.

Release Type: Fix **| Priority:** Medium

Prerequisites: The Program exists with a 'No Episode' type and for the same program Client and Staff is not having access.

Navigation Path: Services (Client)-'Services' List page-Click on New-Service Detail - Select the Program.

Functionality 'Before' and 'After' release:

Note: This will work for the customer environments who are using custom logic.

Before this release, here was the behavior. When creating a Service/Service Note, the staff was able to select the Program which had 'No Episode' type, even though the program was not associated with the logged in Staff and the Client was not enrolled to that Program.

With this release, the above-mentioned issue has been resolved. Now, when creating a service/Service Note, the staff will not be able to select the program which had 'No Episode' type, when the same program is not associated with the logged in staff and the Client is not enrolled to the same Program.

Services/Notes

Reference No	Task No	Description
106	Core Bugs # 127022	IP Psychiatric Note: Unable to check/uncheck the checkboxes by clicking checkbox names.
107	Core Bugs # 127263	IP Psychiatric Note: Validation not displaying for Emergency Indicator.
108	Core Bugs # 126998	Lab comments were initialized/displayed at the top of the Data Reviewed Section and the latest Lab comments were initialized at the last in the Data Reviewed Section.
109	Core Bugs # 127171	Psychiatric Note:'SSP_RDLDynamicColorVitalsFromXML' SP optimization.
110	Core Bugs # 127190	Psychiatric (E&M) Note: The system kept on 'processing' indefinitely whenever the user attempts to add data in the 'Medical Decision Making' tab and clicks on the 'Save' button.
111	Core Bugs # 127220	Facing Slowness in the Psychiatric Note and not able to save.
112	Core Bugs # 126708	IP Psychiatric Note: Unable to check/uncheck the checkboxes by clicking checkbox names.
113	Core Bugs # 127010	Unable to save Service Notes with goals and objectives due to performance issue.

Author: Praveen Gangadhara

106. Core Bugs # 127022: IP Psychiatric Note: Unable to check/uncheck the checkboxes by clicking checkbox names.

Release Type: Fix **| Priority:** High

Navigation Path 1: Client – Services/Notes -- 'IP Psychiatric Note' – click on 'Note' tab – 'General' subtab -- 'Protective Factors' section.

Navigation Path 2: Client – Services/Notes -- 'IP Psychiatric Note' – click on 'Note' tab – 'Exam' subtab -- 'Thought Content and Process: Cognition' section.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'Note' tab of 'IP Psychiatric Note', when the user tried to check/uncheck the checkboxes by clicking checkbox names, it was not checking/unchecking for section 'Protective Factors' in 'General' subtab and 'Thought Content and Process: Cognition' section in 'Exam' subtab.

With this release, the above-mentioned issue has been resolved. Now, in the 'Note' tab of 'IP Psychiatric Note', the user can check/uncheck the checkboxes by clicking checkbox names for the section 'Protective Factors' in 'General' subtab and 'Thought Content and Process: Cognition' section in 'Exam' subtab.

Author: Niroop Hassan

107. Core Bugs # 127263: IP Psychiatric Note: Validation not displaying for Emergency Indicator.

Note: This functionality is implemented for a specific customer. If you have Primary and County type of setup and would like to use these functionalities, please get in touch with Streamline Support.

Release Type: Fix **| Priority:** High

Prerequisite:

1. System configuration key "DisplayCDAGSectionInStaffDetails" value is set to 'Yes'.
2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Navigation Path: 'Client' – 'Services/Notes' - 'Services/Notes' list page – Click on 'New' icon – Select the required data – Click on 'Note' tab – Click on 'Save' icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user navigated to 'Note' tab without selecting 'Emergency Indicator' value and clicked on 'Save' icon, the screen was saved without getting any validation message.

With this release, the above - mentioned issue has been resolved. Now, the 'Emergency Indicator' value needs to be selected before saving the Service Note screen.

Author: Manjunath Mallipatil

108. Core Bugs: 126998: Lab comments were initialized/displayed at the top of the Data Reviewed Section and the latest Lab comments were initialized at the last in the Data Reviewed Section.

Release Type: Fix **|** **Priority:** High

Prerequisites: Psychiatric Note is signed, and Lab Comments is added.

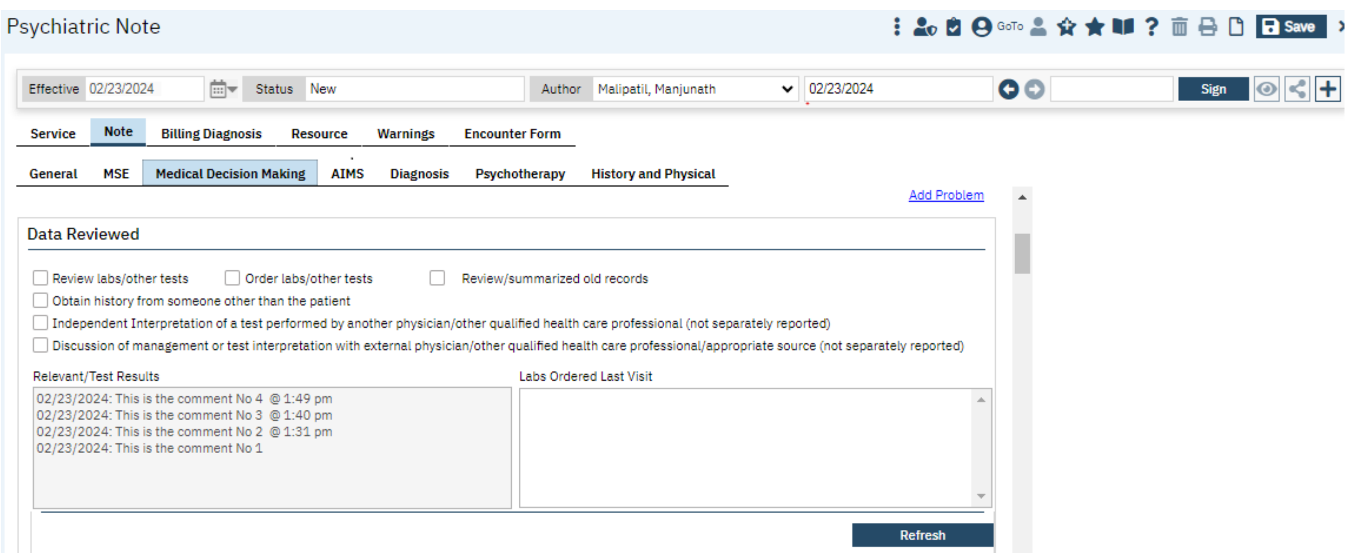
Path to add Lab Comments: Login to SmartCare Application - 'Client' search – Services/Notes (Client)– In Services/Notes Screen Click on New Button – In Service Note Screen enter all the required details –select a procedure which is associated with 'Psychiatric Note' – Click on Note tab – Enter all the details in all the sub-tabs in the Note (Enter the data in the Lab Comments Text field in the Medical Decision Making Sub Tab) -- Sign the Note.

Navigation Path: Login to SmartCare Application - 'Client' search – Services/Notes (Client) – In Services/Notes Screen Click on New Button – In Service Note Screen enter all the required details –select a procedure which is associated with 'Psychiatric Note' – Click on Note tab – Click on Medical Decision-Making Tab –navigate to the Data Reviewed Section – Check the Order of Lab comments in the Relevant/Test Results field.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In Psychiatric Note, in the Relevant/ Test Results field under the Data Reviewed Section, the previous Lab comments were initialized/displayed at the top of the Data Reviewed Section and the latest Lab comments were initialized at the last in the Data Reviewed Section.

With this release, the above-mentioned issue has been fixed. Now, the Latest Lab comments will be initialized at the top in the Relevant/ Test Results field under the Data Reviewed Section in the Psychiatric Note.



Author: Manjunath Mallipatil

109. Core Bugs # 127171: Psychiatric Note:'SSP_RDLDynamicColorVitalsFromXML' SP optimization.

Release Type: Fix **|** **Priority:** Medium

Navigation Path 1: Log in to SmartCare Application -- Select a client -- Services/Notes -- Click on New -- In Service Note Screen Enter all the required fields in the Service tab -- Select a procedure Associated with Psychiatric Note -- Click on the Note tab -- Click On MSE Sub Tab -- Review Vitals section data - - Enter all the details in the Note tab -- Click on Sign Button -- Signature Pop Up -- Sign the Note -- Check the loading time for PDF.

Navigation Path 2: Login to SmartCare Application -- Batch Signature (My Office) -- Document List Section -- – Select 'To Cosign' from the dropdown and click Apply Filter - -Select Psychiatric Note from the list by selecting the radio button –Check the PDF loading time.

Functionality 'Before' and 'After' release:

Before this release, The PDF was taking more time to load in the following scenarios:

1. When a user signed the Psychiatric note, the PDF took more time to load.
2. In the Batch Signature Screen, when a user selected the Psychiatric Note document by selecting the radio button, the PDF was taking more time to load.

With this release, the above-mentioned issue has been resolved by optimizing the SSP 'SSP_RDLDynamicColorVitalsFromXML'. Now, when a user signs a Psychiatric Note, the PDF loads faster. Also, when the user selects the Psychiatric Note in Batch Signature Screen, the PDF loads faster.

Author: Kiran Yogendra

110. Core Bugs # 127190: Psychiatric (E&M) Note: The system kept on 'processing' indefinitely whenever the user attempts to add data in the 'Medical Decision Making' tab and clicks on the 'Save' button.

Release Type: Fix | **Priority:** Urgent

Navigation Path: Open a Client - Go to the 'Clinical Documents' – Go to the 'Services/Notes' – Create New - Select the Procedure related to the 'Psychiatric Note' – Enter the required values in the 'Service' tab – Click on the 'Medical Decision Making' (MDM) tab – Enter some data into Problem section – Click on the 'Save' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The system kept on 'processing' indefinitely whenever the user attempted to add data in the 'Medical Decision Making' tab and clicked on the 'Save' button in the 'Psychiatric (E&M) Note'.

With this release, the issue mentioned above has been resolved. Now, the system's performance has been improved and the users can make necessary changes in the 'Medical Decision-Making' tab and save the 'Psychiatric (E&M) Note' without encountering any issues.

Author: Suganya Sivakumar

111. Core Bugs # 127220: Facing Slowness in the Psychiatric Note and not able to save.

Release Type: Fix | **Priority:** Medium

Navigation Path: Client Search -Select Client - Select 'Services/Notes' - Service/Note List Page - Click on new icon - Service Note detail page-Select Psychiatric Procedure from the procedure drop down- Enter all the required information -Click on Save -Click on Note tab-Click on Medical Decision Making sub-tab-enter the required details -Click on save.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user entered the details in the 'Medical Decision Making' sub-tab under the Psychiatric Note and clicked on Save, the system became very slow and not able to save the services/Note and then the below mentioned error log entry has been recorded in the Errorlog table.

Error Log: "Cannot read properties of undefined (reading 'toLowerCase'), Additional Information: Failed in Method -SetMainScreenSpecificValues"

With this release, the above-mentioned issue has been resolved. Now, the user can save the entered details in the 'Medical Decision-Making' sub-tab under the 'Psychiatric Note' without the slowness of the system and no error log entry has been recorded in the Errorlog table.

Author: Debanjit Das

112. Core Bugs # 126708: Duplicate charges were created when they have add-on services.

Release Type: Fix | **Priority:** Medium

Navigation Path: Go search – Services (Client)- Enter all the fields - Complete the service.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the service was completed, the duplicate charges were created for add-on services. If the original service did not have a charge associated with it, then it creates charges for add-on services.

With this release, the above issue has been resolved. Now, the script ssp_PMCreateInitialCharge has been corrected to avoid creating the duplicate charges when add-on services are present.

Author: Kiran Yogendra

113. Core Bugs # 127010: Unable to save Service Notes with goals and objectives due to performance issue.

Release Type: Fix **|** **Priority:** High

Navigation Path: Open a client - Go to Services/Notes - New – Enter the required values – Save/Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the users tried to save/sign the Services/Notes with goals and objectives in it, it was taking time to save/sign the note.

With this release, the above mentioned issue has been resolved. The users are able to save/sign the Services/Notes with goals and objectives, without any performance issue now.

SmartCare Improvements

Reference No	Task No	Description
114	Core Bugs # 127258	Execution timeout error' and 'Page Unresponsive' issue occurred while user performing action in 'Inquiry' screen.
115	Core Bugs # 127326	Month-End AR Rollover Report is working slowly.

Author: Savitha Siddaraju

114. Core Bugs # 127258: 'Execution timeout error' and 'Page Unresponsive' issue occurred while user performing action in 'Inquiry' screen.

Release Type: Fix **| Priority:** Medium

Navigation Path 1: Client search popup - Enter client details and perform 3 way search - click on 'Inquiry (Selected client)' button - 'Inquiry Details' screen - 'Disposition' section - 'Select Disposition' dropdown value.

Navigation Path 2: 'My office' - 'Inquiries' list page

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below two issues were observed while user performing action in 'Inquiry' screen:

1. Whenever user attempted to open the 'Inquiries' list page, the screen was processing for long time and then the below red error was displayed.

Error message: "Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding."

2. In an 'Inquiry Details' screen, when the user attempted to select the disposition dropdown value in 'Disposition' section, then the below error message popped up through browser.

Error message: "This page isn't responding" or "Page Unresponsive".

With this release, the above-mentioned issue has been resolved. Now,

1. The user is able to open the 'Inquiries' list page without any performance issue and with no error.

2. In an 'Inquiry Details' screen, the user is able to select the disposition dropdown value in 'Disposition' section without any error.

Author: Namratha Nagraj

115. Core Bugs:127326: Month-End AR Rollover Report is working slowly.

Release Type: Fix | **Priority:** Medium

Navigation Path: 'My Office' -- 'Month-End AR Rollover Summary' -- 'Month-End AR Rollover Summary' report -- Enter the required details- - Click on 'View Report' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'Month-End AR Rollover Summary' report, when the user clicked on 'View Report' after entering the required details, the report was loading very slow.

With this release, the above-mentioned issue has been resolved. Now, the 'Month-End AR Rollover Summary' report is loaded without any slowness issue when the user clicks on 'View Report'.

Staff/Users

Reference No	Task No	Description
116	Core Bugs # 126954	The Display As name under a Staff Details does not refresh to the correct name.

Author: Niroop Hassan

116. Core Bugs # 126954: The Display As name under a Staff Details does not refresh to the correct name.

Release Type: Fix | **Priority:** Medium

Navigation Path: Go Search – Staff – New – Staff Details – Enter the details (First Name, Last Name and other fields) – edit the First Name and Last Name field values.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Staff Details screen, when the user had entered the First Name and the Last Name fields, the Display As field value was not updated when the first and last name changed, every time.

With this release, the above-mentioned issue has been resolved. In the Staff Details screen, the Display As field value is updating when every time the first and last name changes.

Table Editor

Reference No	Task No	Description
117	Core Bugs # 127096	Table Editor: Getting Red error when user tried to modify the data in the 'ActionDefaultFilters' column of 'ScreenActions' table.

Author: Veena Santosh

117. Core Bugs # 127096: Table Editor: Getting Red error when user tried to modify the data in the 'ActionDefaultFilters' column of 'ScreenActions' table.

Release Type: Fix **|** **Priority:** Medium

Prerequisite:

- Create 'Health Data Templates', through **Path:** Administration -- 'Health Data Templates' – search for Vital and click on Apply Filter – open the vital by clicking the link under "Template Name" – 'Create a Flow Sheet Template' page will open – Click on 'i' icon – 'HealthDatatemplateId' value(ex:110) will display.
- Make a note of the "HealthDatatemplateId" value from the information "i" icon.
- Update the system configuration key "FLOWSHEETDEFAULTTEMPLATE" value with the "HealthDatatemplateId" value (Ex:110).

Navigation Path: Administration -- Table Editor – enter query in SQL Query text box – click on Execute -- 'ScreenActions' table will display – In 'ScreenActions' table - 'ActionDefaultFilters' column -- Modify the 'HealthDatatemplateId' value.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'ScreenActions' table, when the user tried to modify value for 'HealthDatatemplateId' in 'ActionDefaultFilters' column, the below mentioned error was displayed:

Error Message: *Invalid Query*

With this release, the above-mentioned issue is resolved. Now, the user can modify the value for 'HealthDatatemplateId' in the 'ActionDefaultFilters' column of 'ScreenActions' table without any error.

Whiteboard

Reference No	Task No	Description
118	Core Bugs # 127001	Completed order still showing on whiteboard.

Author: Chaitali Patil

118. Core Bugs # 127001: Completed order still showing on whiteboard.

Release Type: Fix **|** **Priority:** High.

Navigation Path 1: Perform 'Client search' -- Go search -- Bed board (My Office) -- Admit the client into Bed Board.

Navigation Path 2: Go search -- Whiteboard (My Office) -- verify (Navigation Path 1) -- admitted Client displays in 'Whiteboard'.

Navigation Path 3: Go to search -- Orders (Admin) -- Click on 'New' -- Create one Order (Like Medication. Lab, Radiology….)

Navigation Path 4: Perform 'Client search' -- Go search -- 'Client Orders' Client -- Click on 'New' -- Search for above order (Navigation Path 3) -- fill the require field -- Click on 'Insert' -- Click on 'save' -- signed the Order -- Navigate to -- Whiteboard screen -- and check under the 'Observation' column signed 'Order Name' displays -- again navigate back to the 'Client Order' list Page -- Select respective order and change the 'Order Status' Form 'Active' to 'Complete' -- Navigate back to the Whiteboard -- 'complete' order--This should not display in 'Whiteboard' under the 'Observation' column.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When an Order status was changed to 'complete', it was still displaying in the 'Whiteboard'.

With this release, the above-mentioned issue has been fixed. Now, the orders having a 'Status' as 'Complete' and 'Discontinue' will not display in the whiteboard.

Widgets

Reference No	Task No	Description
119	Core Bugs # 127152	Getting an error while loading the Supervisee Primary Caseload widget.
120	Core Bugs # 127061	Referral Coordinator Widget: Consult orders are duplicating.

Author: Niroop Hassan

119. Core Bugs # 127152: Getting an error while loading the Supervisee Primary Caseload widget.

Release Type: Fix | **Priority:** High

Navigation Path: 'My Office' – 'Dashboard' – 'Supervisee Primary Caseload' Widget.

Functionality 'Before' and 'After' Release:
Before this release, here was the behaviour. When the user tried to load the data of the 'Supervisee Primary Caseload' widget, the widget was getting Timed out and the following Red Error was displayed.

Error message: 'Error while loading widget.'
With this release, the above-mentioned issue has been resolved. Now, the 'Supervisee Primary Caseload' widget loads the data without any error.

Author: Chaitali Patil

120. Core Bugs # 127061: Referral Coordinator Widget: Consult orders are duplicating.

Release Type: Fix **| Priority:** Medium

Navigation Path 1: Administrator -- Orders -- Click on 'New' -- Create a 'Consult' Order.

Navigation Path 2: Perform 'Client search' -- Go search -- 'Client Orders' Client -- Click on 'New' -- Search for above order (created in Navigation Path 1) -- fill the require field -- Click on 'Insert' -- Click on 'save' -- sign the Order.

Navigation Path 3: My Office -- Dashboard -- navigate to the Referral Coordinator (widget) and verify if duplicate orders are displayed on the widget.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. The duplicate 'Consult' orders were displayed on the 'Referral Coordinator' (widget).

With this release, the above-mentioned issue has been fixed. Now, on the 'Referral Coordinator' widget, the duplicate 'Consult' orders are not displaying.

Glossary of System Configuration Keys, Global Codes, Recodes

System Configuration Keys

Global Codes

Recodes

Data Model Changes:

68. LocationModeOfDeliveries table is added.

68. 'AllModeofDelivery' column is added to Locations table.

70. 'InitialQuantity', 'QuantityOnHandML', 'Units', 'Liquid' columns are added to MedicationInventories table.

70. 'QuantityML' column is added to MedicationTransactions table.

73. Created two new tables ('MATLighthouseMedicationMappings', 'MATLighthouseDosageFormCodeMappings') For MAT Lighthouse Report.

80. 'MarkCrossoverChargesDoNotBill' column is added in Coverageplans Table.

84. A new table 'ProcedureCodeModeOfDeliveries' is created.

84. 'AllowAllModeOfDeliveries' column is included in 'ProcedureCodes' table.

85. 'CreateServiceOnDateOfDischarge' column is included in Programs table.

95. 'SpecialInstructions' column is included in 'DrugOrderTemplates' table.

102.'ModeOfDeliveryFilteredby','ModeOfDeliveryUsesSharedTable', 'ModeOfDeliverySharedTableStoredProcedure', 'ModeOfDeliveryStoredProcedure' columns are included to the ServiceDropdownConfigurations table.