RELEASE NOTES: 02/15/2024.
Monthly Service Pack – SC.CORE.6.0_1.18.000.2401.012

Executive Summary:

1. A new button 'Download PDSRF' is implemented in the Compliance Batch Details Page for Batch type 274. On click of this button, a report with Contacts and Submission details is generated which will be included in the 274 .dat file. (**EII #126792**)

2. A new tooltip has been added for External order entries in the RX application. (**EII # 126681**)

3. The Changes are done in the 'Pharmacy Orders' list page to identify Denied/Processed results & if 'Processed "result is chosen, then a 'Confirmation Message' popup is displayed. (**EII#126576**)

4. Implementation is done to hide and unhide Chosen name from Client Search Popup. (**EII #126092**)

5. A new system configuration key 'AllowFutureEffectiveDateInDocuments' is implemented, and the value of this key is used to allow or restrict the user to enter the future "Effective Date" in all the documents. (**EII #3370**)

6. ~~Implemented the 'Case Information(C)' section – 'Case Initiation Date' field under 'Client Information(C)' screen. For the Foster Care customers, this will help to enter and track specific data for their clients. (**EII #126291**)~~

7. A new 'Encounter Form' document with the required field with validations is implemented. This will capture a signature from the client after every service to certify that the service has been provided and/or received. (**EII #126431**).

8. A new field 'Show Encounter Form' has been added with 'Yes' and 'No' radio buttons in the 'Document code detail' screen to display Encounter Form tab in service note. (**EII #125928**).

9. A new standalone 'C-SSRS Risk Assessment (Lifeline) v3' document has been implemented and also "Risk and Protective Factors" tab is replaced to 'C-SSRS Risk Assessment (Lifeline) v3' tab. This screen is implemented to capture the mental health concerns of the client. (**EII #126731**).

10. When processing FQHC claims to Medicare, Commercial, or Medicaid plans, there is a need to configure (by plan) which services must be included on a claim before releasing it, which charges will be listed with $0.00 values versus standard charges, and how the services will be ordered on the claim. This is implemented in this enhancement. (**EII #126270**).

11. A new 'Rapid Opioid Dependence Screen' document is implemented to support the rapid assessment of individuals experiencing incarceration with HIV to allow buprenorphine induction on the day of release, if necessary. (**EII #125759**).

12. There are times where paper orders on the ICC need to be cosigned/signed by the doctor; psych testing materials also need to be cosigned by doctor etc. To take care of these scenarios, the application is allowing to add Co-Signers for scanned documents and allow those Co-Signers to Co-Sign it (**EII #126113**).

13. Implemented Medication line format in Client Order PDF and Client MAR to include full medication Strength and Formulation. (**EII #126696**).

14. A PCP letter report is implemented to capture the Date of Service that was completed previously for the client by the provider, the Primary Diagnosis that was used and the Medications that was prescribed. (**EII #125778**).

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Abbreviation: **EII - Engineering Improvement Initiatives**

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TASKS SUMMARY – 'CHANGE' RELATED (21)

Sl. No	Task No	Summary	Module Name
12	EII # 126076	Implementation of 2330B Loop for Other Payer Claim Control Number 837P.	Charges/Claims
13	EII # 126077	Implementation of 2330B Loop for Other Payer Claim Control Number 837I.	Charges/Claims
~~24~~	~~EII # 126291~~	~~Implemented the 'Case Information(C)' section – 'Case Initiation Date' field under 'Client Information(C)' screen.~~	~~Client Information C~~
26	EII # 126576	Changes in the 'Pharmacy Orders' list page to identify Denied/Processed results & 'Confirmation Message' popup.	Client Orders
33	EII # 126092	Implementation to hide and unhide Chosen name from Client Search Popup.	Client search
39	EII # 125928	Added 'Show Encounter Form' field in Document Codes Detail screen.	Document Codes Detail
40	EII # 3370	Implementation of Configuration key to Prevent future signing on document.	Documents
42	EII # 126304	Changes are implemented to the new version (edit) of the Goal Plan document to prevent duplicate client orders.	Documents
44	EII # 126731	Implemented a new standalone 'C-SSRS Risk Assessment (Lifeline) v3' document and "Risk and Protective Factors" tab is replaced to 'C-SSRS Risk Assessment (Lifeline) v3' tab with functionality.	Documents
~~45~~	~~EII # 126815~~	~~Custom hook has been added to the files to display a custom field tab in the 'Agency/Program Discharge' document.~~	~~Documents~~
70	EII # 124735	API Provider Directory.	Interface
90	EII # 125876	Implementation to add a new Order Type option 'Nutrition' and its other functionalities are implemented in the 'Order Details' screen.	Orders
91	EII # 126696	Implemented Medication line format in Client Order PDF and Client MAR.	Orders
~~95~~	~~EII # 125780~~	~~A new 'Medication' radio button is added in the 'Health Maintenance Template' screen.~~	~~Primary Care~~
104	EII # 125366	RX: Consent Real-Time Med History functionality with appointments.	Rx Application
105	EII # 126681	Rx: Implementation to add new tooltip for External order entries.	Rx Application
113	EII # 126113	Implementation to add a Cosigner to Scanned Documents.	Scanning
117	EII # 126075	Service note and group note PDF changes.	Services/Notes
118	EII # 126139	Implementing Sign button functionality for Client Signature to Verify Service(s) Received.	Services/Notes

124	EII # 126278	No action on clicking Reset button in the Forgot Password pop up for Active Directory login user.	SmartCare Improvements
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Sl. No	Task No	Summary	Module Name
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41	EII # 125759	Implementation of new 'Rapid Opioid Dependence Screen' document.	Documents
43	EII # 126431	Implementing a new 'Encounter Form' document with the required field with validations.	Documents
61	EII # 126805	Client Signature to Verify Service(s) Received - Service Note changes, Encounter Form.	Group Services
80	EII # 125778	Implementation of PCP Letter template.	Mange Letter Template

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3	Core Bugs #126595	The Activity Tracker Report sorting the flow sheet data elements alphabetically instead of template order.	Activity Tracker
4	Core Bugs #126828	Primary program and primary program ID missing from active clients	Adhoc Reporting
5	Core Bugs #126851	SendingFacilityIdentifier and Hospital name was inserted manually to process HL7 ADT inbound messages in the ADTHospitalMaster table.	ADT
6	Core Bugs #126032	Date Format is not correct for Discharge Date and Discharge Date/Time in ADT List and ADT Detail page respectively.	ADT
7	Core Bugs #126234	Authorizations List Page Filter Misspelling/Typos	Authorizations
8	Core Bugs #126821	Error is displayed when trying to save.	Authorizations
9	Core Bugs #126883	a new version of the document is created and the status of the document is changing to InProgress on declining to so-sign the document	Batch Signature
10	Core Bugs #126979	When the client was deleted from Residential (My office) board, unable to readmit client	Bedboard
11	Core Bugs #126791	In the 'Reassignment' list screen, remove the 'Discharged' client from Program Assignment, under 'Treatment Team Role' dropdownlist search.	Caseload Reassignment
14	Core Bugs # 7113	Charges/Claims: The Reallocation process is transferring the charges with Charge errors	Charges/Claims
15	Core Bugs #126660	Billing: Claims warning error while trying to bill for secondary charge ids.	Charges/Claims
16	Core Bugs #126798	The system is not fetching the values in the claim file under the 'CL1' segment, as per the rule added in the 'Claim Format Configuration' screen.	Charges/Claims
17	Core Bugs #126832	The ModifierId1, ModifierId2, ModifierId3, and ModifierId4 columns in the ProcedureRates table are not being updated for the ProcedureRateId's	Charges/Claims
18	Core Bugs #126833	Review/revise code modifications made to 837I as part of Feature 269174	Charges/Claims
19	Core Bugs #127021	CORE Claims framework changes for Bundle by Custom Field value	Charges/Claims
20	Core Bugs #126805	Incorrect warning message displayed even when multiple claims were selected for Pay.	Claims
21	Core Bugs #126983	Hourly Billing Codes not calculating properly	Claims
22	Core Bugs #126871	Client Fees List page columns are not aligned properly.	Client fees
23	Core Bugs #126830	The previously opened flags are displayed when the user opens a client with no flags.	Client Flag
25	Core Bugs #126568	Release of Information Log: Un-Locking Effective Releases displays the "Ineffective" entries but disappears	Client Information C
27	Core Bugs #126691	Client Order: "Select All" checkbox disappears in the 'Order Set' tab.	Client Orders

28	Core Bugs #126862	Client Orders: Order requisition cuts off NPI	Client Orders
29	Core Bugs #126868	Client Order: displaying duplicate diagnosis codes.	Client Orders
30	Core Bugs #126913	"Search Adhoc" Checkbox is always checked while inserting an order in the 'Client Order' screen.	Client Orders
31	Core Bugs #126918	The latest modified frequency is not displayed in the PDF.	Client Orders
32	Core Bugs #126812	PC: While navigating to the 'Add-On Codes' tab and navigating back to the 'E&M Code Evaluation' tab, the added dropdown value does not retain the previously selected value under the 'EM Sign Note' pop-up of the 'Medical Progress Note' document.	Client Progress Note
34	Core Bugs #126904	Organization Radio Button in Client Search not Functioning	Client search
35	Core Bugs #126990	CM Events: The provider selected in the Events tab is not reflected to the Notes tab for the next new authorization screen of the client	CM Events
36	Core Bugs #126802	The pop up name is renamed in the Coverage Screen.	Coverage
37	Core Bugs #126941	Coverage Screen: Error message was displayed when the user tried to enter the End date manually in the Set End Date Control field.	Coverage
38	Core bugs #126810	Disclosure/Request Details' screen : "Request From" And "Disclosed To" Fields are disabled	Disclosure/Request
46	Core Bugs #125855	Multiple issues observed in the Program Assignments	Documents
47	Core Bugs #126690	The checkboxes checked in the current medication section are not retained.	Documents
48	Core Bugs #126702	'Consent To Treat' PDF document: Custom document PDF format displayed instead of DFA format.	Documents
~~49~~	~~Core Bugs #126769~~	~~National Outcome Measures (NOMS) screen: The incorrect tab is enabled and an Invalid validation message is displayed.~~	~~Documents~~
~~50~~	~~Core Bugs #126784~~	~~The vitals from the Flowsheet is not showing in the NOMS (National Outcome Measure) document based on the date~~	~~Documents~~
51	Core Bugs #126801	'Family Meal Menu' document PDF: 'Meal Choice' field's value displayed as numbers.	Documents
52	Core Bugs #126870	Documents: All the entered details are not displayed in the 'DLA 20 Youth' document PDF	Documents
~~53~~	~~Core Bugs #126897~~	~~PC: Medical Progress Note: The user is unable to navigate back to the 'Medical Progress Note' screen from some other screen.~~	~~Documents~~
54	Core Bugs #126955	User was able to Sign the Documents without selecting any Program when the respective Document Codes had 'Exclude from CDAG rule' checkbox had null value.	Documents
55	Core Bugs #126970	Diagnosis Duplicating in Diagnosis List of Dx Document	Documents
56	Core Bugs #127023	Template(s): The tag names did not appear in the suggestions.	Documents
57	Core Bugs #126770	Adding New Flow Sheet was resulting in glitching and significant slowness	Flow Sheet
58	Core Bugs #126775	Flow Sheet: vital details not displaying in the Graphs tab for processed lab results	Flow Sheet

~~59~~	~~Core Bugs #126900~~	~~Error is displayed during the execution of the FC discharge support plan validation script.~~	~~Foster Care~~
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62	Core Bugs #126854	In the Group Services DFA the Goals and Objectives are not saving correctly.	Group Services
63	Core Bugs #126881	Group Note: validation message for the Attending field is not displaying when Attending set up was done in the procedure code details page	Group Services
64	Core Bugs #126893	Error message is displayed when creating a new Group service.	Group Services
65	Core Bugs #126896	The Group Recurring Services end date is not adjusted after changing.	Group Services
66	Core Bugs #126915	An Error message is displayed when the user changes the service time and once the nightly job runs.	Group Services
67	Core Bugs #126817	Inquiry Details: Error log in the 'Error log Viewer' screen when click on 'Save' button in 'Inquiry Details' screen	Inquiry Details
68	Core Bugs #126845	Inquiry Details: Disposition Section: Inactive Work Group was displaying	Inquiry Details
69	Core Bugs #126866	Inquiry Details - Tabbing through the Client Information (Potential) Section was from left to right	Inquiry Details
71	Core Bugs #126601	Client Orders: Order Status not updated as Result Obtained when received the Lab Result	Interface
72	Core Bugs #126648	Error is displaying when sending the message to Quest lab	Interface
73	Core Bugs #126674	The 'LOINC code' details for 'Lab orders' are not inserting in the 'HealthDataTemplates' table, when the 'Compendium' is processed through 'SQL job'.	Interface
74	Core Bugs #126861	Continuity of Care Document/Record Details: Comma is displayed in front of Author Name	Interface
75	Core Bugs #126942	Courtesy Copy information is not pulling correctly and displaying deleted Courtesy Copy information in eRequistion and HL7 Message	Interface
76	Core Bugs #126957	Lab Results: 'Performing Lab information' is not displaying under Lab Results tab in the 'Client Order' screen.	Interface
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78	Core Bugs #126789	The horizontal Scroll Bar is not displaying on DFA List pages after Apply Filter.	List Page Framework
79	Core Bugs #126906	Auto Pay Claims failed - (intermittent issue) Claim manual approval created duplicate entries in ClaimLineCoveragePlans	Manage Claims
81	Core Bugs #126762	The font size and font style set in the Letter Template screen was not copied to the PDF.	Mange Letter Template
82	Core Bugs #126816	Activation of the 'Allowed to add/modify/delete codes' checkbox in the 'LETTERTEMPLATE' Global Code Category.	Mange Letter Template
83	Core Bugs #126857	Services are not being created on the Medical progress Note sign.	Medical Progress Note
84	Core Bugs #126886	Getting an error when tried to 'Save/Sign' the 'Medical Progress Note'.	Medical Progress Note

85	Core Bugs #126931	Message Detail' screen: Clients associated to other staffs are displayed	Messages
86	Core Bugs #126747	My Caseload: Inactive Staff caseload is displayed when 'Organizational Hierarchy' is selected.	My Caseload
87	Core Bugs #126781	My Caseload list Page Shows Incorrect "Last Seen by Me" Date	My Caseload
88	Core Bugs #126824	My Caseload screen resizing when using filters	My Caseload
89	Core Bugs #126891	Time out error is displayed on My Caseload screen.	My Caseload
92	Core Bug # 126932	Issues in Orders list page and Pending Lab Specimen Collection widget	Orders
93	Core Bugs #126799	User unable to Acknowledge multiple orders at a time	Orders/Rounding
94	Core Bugs #126859	The total payment amount in the downloaded 'Excel sheet' did not match the applied amount in the 'Payment/Adjustment Posting' pop-up screen.	Payments/Adjustments
~~96~~	~~Core Bugs #126863~~	~~The screen set in the client Page Preference is not displayed on click of Client ID in Primary Care Appointments pop-up.~~	~~Primary Care~~
~~97~~	~~Core Bugs #126867~~	~~Medical Progress Note: The System Tags have weird behavior where text color changes to the wrong color.~~	~~Primary Care~~
~~98~~	~~Core Bugs #126880~~	~~PC: Not all problems showing in the Problems widget on Client Summary Primary Care~~	~~Primary Care~~
~~99~~	~~Core Bugs #126910~~	~~The Prenatal Care tag details were not displayed correctly in the Medical Progress Note.~~	~~Primary Care Progress Note~~
100	Core Bugs #126820	Getting an error when staff attempt to open a program for an inactive client	Programs
101	Core Bugs #126989	No value is displayed in the '% Cap used' field under the 'Contract Details' tab of the 'Contract Details' screen.	Provider Contract
102	Core Bugs #126997	Copy Contracts action copied the associated clients from one Provider contract to another provider contract.	Provider Contract
103	Core Bugs #126419	Reception screen: Unable to type any amount in the CoPay Amt field	Reception
106	Core Bugs #126136	Client MAR: "Monday Through Friday" Medication Showing on Weekends as Well	Rx Application
107	Core Bugs #126268	Issues occurred in the 'Patient Summary' page when the user navigating to the 'Patient Summary' page.	Rx Application
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110	Core Bugs #126837	Medication records were not saving in database properly for existing non ordered medication.	Rx Application
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114	Core Bugs #127032	An Error message while saving the Service Details Page	Services
115	Core Bugs #126879	Recurring Services: The user is not able to edit the 'Recurrence service' when the appointment created	Services

		for that service is deleted even if the respective service exists.	
116	Core Bugs #126999	The appointment is no longer on Schedule.	Services
119	Core Bugs #126711	Error message indicating something is duplicating the document when staff is trying to save the note.	Services/Notes
120	Core Bugs #126848	Regenerate Charge Dropdown Option on "Services - My Office" Screen Not Functioning	Services/Notes
121	Core Bugs #126986	Adding the custom hook for the Core SSP.	Services/Notes
122	Core Bugs #127018	Staff and proxy user not able to edit the signed Service Notes	Services/Notes
123	Core Bug # 126928	Signature pad not signing after unplugged	Signature Popup
126	Core Bugs # 126819	Document Codes: 'Editable After Signature' radio button issue.	SmartCare Improvements
127	Core Bugs # 126860	Performance issue while logging in to the Smartcare.	SmartCare Improvements
128	Core Bugs # 126838	The Smartlinks are not visible in the Dark Navigation Theme mode.	SmartLiks
~~129~~	~~Core Bugs # 126815~~	~~Primary Care Type dropdown was not displaying values based on sorting order specified in Global Code category 'PCAPPOINTMENTTYPE'~~	~~Staff Calendar~~
130	Core Bugs # 126952	On signing the 'Admission and Discharge' documents, but in the 'Teds Episode', the Service End Date is not getting updated.	Teds Tracking List
131	Core Bugs # 126887	Time Service Entry Slowness.	Time Service entry
132	Core Bugs # 126733	Where only two of the three signed 'PHQ A/PHQ 9' documents are showing in the custom widget after making edits to any one of the documents.	Widgets
133	Core Bugs # 126840	Summary Widget is not displayed properly when zoomed in the Patient Portal	Widgets
134	Core Bugs # 127013	Performance issue :Tracking Widget Time Out	Widgets

Functionality-wise Task Details:

274 PDSRF

Reference No	Task No	Description
1	EII # 126792	Compliance Batch Details Page: Implementation of Download PDSRF button

Author: Santhosh Krishnegowda

1. EII # 126792: Compliance Batch Details Page: Implementation of Download PDSRF button.

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

Navigation Path: 'My Office' – 'Compliance Batch List Page' – 'Batch Type-274' – 'Compliance Batch Details Page'- 'Download PDSRF' button.

Functionality 'Before' and 'After' release:

Purpose: This report summarizes some of the data elements included in the 274 .dat file. The data in the PDSRF is used by the state to validate the 274.

Note: This implementation is done for California state customers and dependent on state fix build - SC.CA.6.0_0.34.000.2402.001 to work entirely. Planned Release date for the build – 02/25/2024.

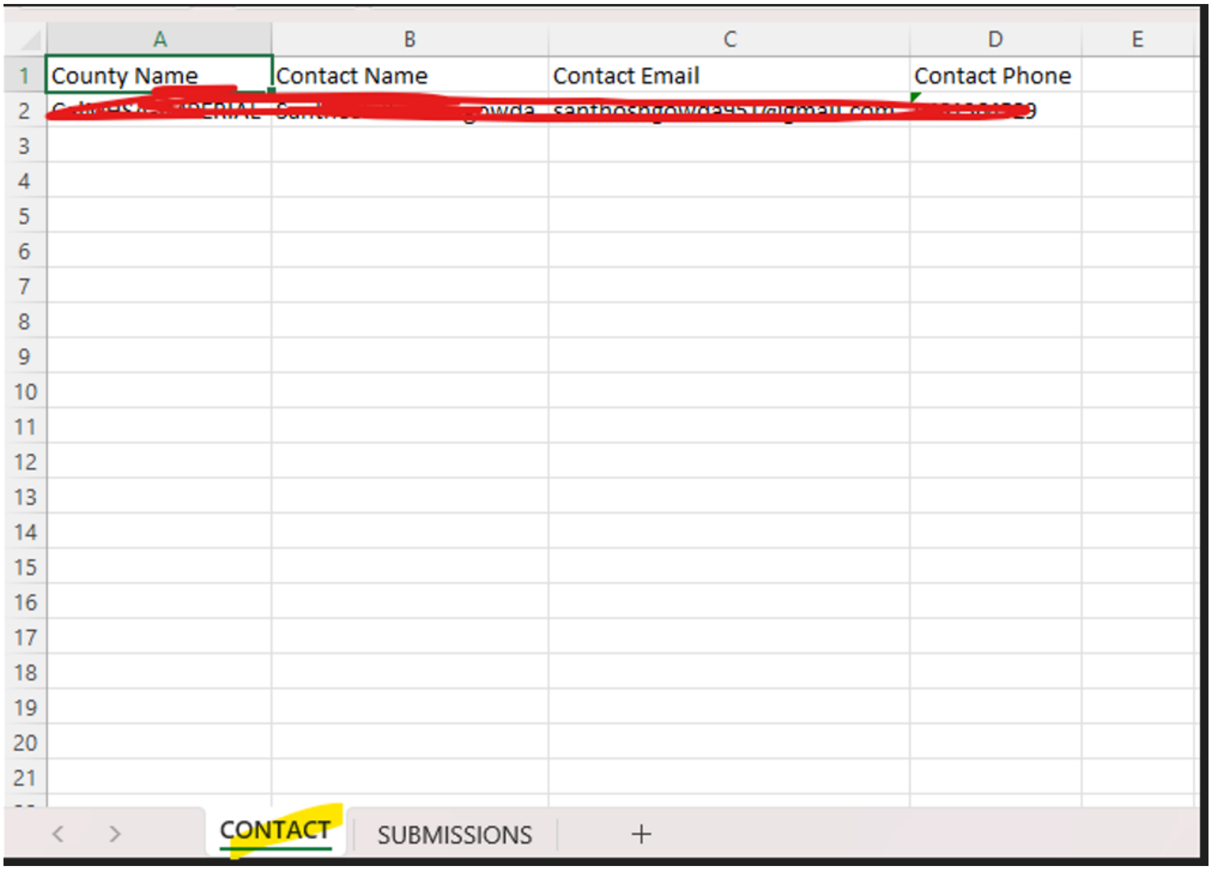
With this release, a new button 'Download PDSRF' is implemented in the Compliance Batch Details Page for Batch type 274.

On clicking the 'Download PDSRF' button, the report will be exported which contains Contacts and Submission details which are included in the 274 .dat file.

The exported report will have 2 tabs:

1) **Contact:** This tab will have the contact information from 274 data file.

2) **Submissions:** This tab will have Provider groups, sites and Providers count with submission/extraction details.



The below mentioned details/tabs will be displayed in Contact tab.

- **Contact:** This tab will have the contact information from 274 data file as below:
- **County Name:** This column will display the name of the County.
- **Contact Name:** This column will display the name of the Contact.
- **Contact Email:** This column will display the email id of the Contact.
- **Contact Phone:** This column will display the Phone Number of the Contact.

2) **Submissions:** This tab will have the Provider groups, sites and the Providers count with submission/extraction details.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	County Name	HCP Code	274 File Submission Date (YYYY-MM-DD)	274 Reporting Month (YYYY-MM)	Full Submitted File Name	Submitted Transaction (ST/SE) Count	Submitted Distinct Group Count	Submitted Distinct Site Count	Submitted Distinct Provider Detail NPI Count	274 File Resubmission (Y/N)	Reason for resubmission		
2													
3													
4													
5													
6													
7													
8													
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CONTACT | SUBMISSIONS | +

- **XXX County Name:** This column will display the XXX County Name.
- **HCP Code:** This column will display the three-digit county HCP Code.
- **274 File Submission Date (YYYY-MM-DD):** This column will display the SUBMISSION DATE of the monthly 274 file in YYYY-MM-DD format and the month and day MUST both include the leading zero. This is the date of the 274 file that was submitted to DHCS.

Example: Correct format: 2022-06-10

Wrong format: 2022-6-10, 6/10/22, 06-10-22, 22-06-10, etc.

- **274 Reporting Month (YYYY-MM):** This column will display the REPORTING MONTH in YYYY-MM format, and the month MUST include the leading zero.

Example: Correct format: 2022-05

Wrong format: 2022-5, 5/22, 05-22, 19-22, etc

- **Full Submitted File Name:** This column will display the name of the SUBMITTED 274 FILE. This must match exactly the full submitted filename, including the ".dat" extension.
- **Submitted Transaction (ST/SE) Count:** This column will display the 'Submitted Transaction (ST/SE) Count'. Total Number of ST/SE segments in your file. Most counties will have one '1' ST/SE segment. Counties with delegated subnetworks may have additional ST/SE segments.
- **Submitted Distinct Group NPI Count:** This column will display the total 'Submitted Distinct Group NPI Count'
- **Submitted Distinct Site NPI Count:** This column will display the total 'Submitted Distinct Site NPI Count'
- **Submitted Distinct Provider Detail NPI Count:** This column will display the total 'Submitted Distinct Provider NPI Count'
- **274 File Resubmission (Y/N):** This column will be updated as 'Y' if this 274 file was previously accepted for the reporting period but is being resubmitted with corrections. Will display 'N' if the file is not a resubmitted file.
- **Reason for resubmission:** If Column 274 File Resubmission = 'Y', the reason for resubmitting the file will be displayed. Example: 'The previously submitted file did not contain all providers in the network for the reporting month'.

Activity Tracker

Reference No	Task No	Description
2	Core Bugs # 126826	My Client Activities : Activity records were displayed in both the units when moved from one Unit to another instead of the latest unit.
3	Core Bugs # 126595	The Activity Tracker Report sorting the flow sheet data elements alphabetically instead of template order.

Author: Abhishek Naik

2. Core Bugs # 126826: My Client Activities: Activity records were displayed in both the units when moved from one Unit to another instead of the latest unit.

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

Prerequisites:

1. Client order is signed with type 'Activity'.

2. Client is moved from one unit to another unit.

Navigation Path: Go search- My Client Activities- Apply filter by selecting the units.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the clients were moved from one unit to another, the activity records were displayed in both units instead of the latest unit under the My Client Activities screen.

With this release, the above-mentioned issue has been resolved. Now, when the clients are moved from one Unit to another, the latest Unit Activity records are displayed in the My Client Activities screen.

Author: Abhishek Naik

3. Core Bugs # 126595: The Activity Tracker Report sorting the flow sheet data elements alphabetically instead of template order.

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

Prerequisites: Activity order with flowsheet entry is to be present.

Navigation Path: Search 'Activity Tracker Report' – Check the flowsheet data sorting.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The Activity Tracker Report was sorting the flowsheet data elements alphabetically instead of template order.

With this release, the above-mentioned issue has been resolved. Now, the flowsheet data elements are sorted based on template order in the Activity Tracker Report page.

Adhoc Reporting

Reference No	Task No	Description
4	Core Bugs # 126828	Primary program and primary program ID missing from active clients.

Author: Harika Rajendran

4. Core Bugs # 126828: Primary program and primary program ID missing from active clients.

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

Navigation Path: 'My Office' – 'Adhoc Reporting' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In Adhoc Reporting screen, the Primary Program and Primary Program ID details were not displaying for the active clients, even when the clients were enrolled in the Program and it was set to Primary.

With this release, the above mentioned issue has been resolved and the Primary Program and the Primary Program ID details are displaying for active clients in the Adhoc Reporting Screen.

ADT

Reference No	Task No	Description
5	Core Bugs # 126851	SendingFacilityIdentifier and Hospital name was inserted manually to process HL7 ADT inbound messages in the ADTHospitalMaster table.
6	Core Bugs # 126032	Date Format is not correct for Discharge Date and Discharge Date/Time in ADT List and ADT Detail page respectively.

Author: Jagadeesh Raju

5. Core Bugs # 126851: SendingFacilityIdentifier and Hospital name was inserted manually to process HL7 ADT inbound messages in the ADTHospitalMaster table.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The SendingFacilityIdentifier and Hospital name was inserted manually to process HL7 ADT inbound messages in the ADTHospitalMaster table. The inbound HL7 ADT messages were not processed if the SendingFacilityIdentifier and the Hospital name details did not exist in the ADTHospitalMaster table.

With this release, the above mentioned issue has been fixed. Now, SendingFacilityIdentifier details is being taken from the HL7 ADT inbound message to dynamically create new Hospital name details, if the details did not exist in the ADTHospitalMaster table.

Author: Jagadeesh Raju

6. Core Bugs # 126032: Date Format is not correct for Discharge Date and Discharge Date/Time in ADT List and ADT Detail page respectively.

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

Navigation Path1: Go Search – ADT (My Office) – ADT list page.

Navigation Path2: Go Search – ADT (My Office) – ADT list page – click on Admission Date hyperlink – ADT Details screen – click on + icon in the Discharge section.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the ADT list page, the Discharge Date was displayed in M/D/YYYY format. Also, in the ADT Detail screen, the Discharge Date/Time was displayed in M/D/YYYY H:MM:SS format.

With this release, the above mentioned issue has been fixed. Now, the Discharge Date is displaying in MM/DD/YYYY format in the ADT list page and the Discharge Date/Time is displaying in MM/DD/YYYY HH:MM:SS in the ADT Detail screen.

Authorizations

Reference No	Task No	Description
7	Core Bugs # 126234	Authorizations List Page Filter Misspelling/Typos.
8	Core Bugs # 126821	Error is displayed when trying to save.

Author: Shivkanth Moger

7. Core Bugs # 126234: Authorizations List Page Filter Misspelling/Typos.

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

Navigation Path: Go search – 'Authorizations' – 'Authorizations' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below-mentioned issues were observed in the 'Authorizations' list page filters:

Issue 1: The Spelling 'All Requesters' was displayed as 'All Requestor'.

Issue 2: The Spelling 'All Authorization Codes' was displayed as 'All Authorization Code'.

With this release, the above-mentioned issue has been resolved. Now, in the 'Authorizations' list page filters, the above-mentioned issues are resolved.

Issue 1: The Spelling 'All Requesters' is displaying correctly.

Issue 2: The Spelling 'All Authorization Codes' is displaying correctly.

Author: Shivkanth Moger

8. Core Bugs # 126821: Authorizations: Error is displayed when trying to save.

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

Navigation Path: Client-Authorizations -Authorizations List page-Click on Id (Hyperlink)-Select any Approved Auth code from the Authorization grid- Change the status from Approved to Deleted/Inactive-Click on modify-click on Save.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. While saving the Authorizations in the Authorization details page, the error message was displayed due to ' 'Deleted/Inactive' auth code records were listed in the Authorization grid.

Error Message: Cannot insert the value NULL into column 'AuthorizationCodeId', table 'CBHSmartCarePrd.dbo.Authorizations', column does not allow nulls. UPDATE fails. The statement has been terminated.

With this release, the above-mentioned issue is resolved. Now, the 'Deleted/ Inactive' auth codes are not displayed in the Authorization Details and Authorization list page. Hence the error message is not displayed while saving.

Batch Signature

Reference No	Task No	Description
9	Core Bugs # 126883	A new version of the document is created and the status of the document is changing to InProgress on declining to so-sign the document.

Author: Aishwarya Bommaklar

9. Core Bugs # 126883: A new version of the document is created and the status of the document is changing to InProgress on declining to so-sign the document.

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

Navigation Path 1: My Office – Batch Signature – Select Co-Sign option – Click on Apply Filter – Select the check box next to Client Name in Document List grid – Click on Decline button.

Navigation Path 2: Client – Documents list page – Select the above Declined document – Click on the Document name hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the Co-Signer declined to Co-Sign the document, a new version of the document was created and the status of the document changed to InProgress.

With this release, the above-mentioned issue is resolved. Now, a new version of the document is not created when the Co-Signer declines to sign and the status of the document remains as Signed.

Bedboard

Reference No	Task No	Description
10	Core Bugs # 126979	When the client was deleted from Residential (My office) board, unable to readmit client.

Author: Aishwarya Bommaklar

10. Core Bugs # 126979: When the client was deleted from Residential (My office) board, unable to readmit client.

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

Prerequisite: Admit a Client to the bed.

Navigation Path 1: My Office – Bedboard screen – Select Occupied bed – Click on the status hyperlink – Click on Delete icon – Select Yes in the Confirmation pop up.

Navigation Path 2: My Office – Bedboard screen – Select Open Bed – Select Admit option from the status for the same above client.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user deleted the inpatient visit for a client and then tried to admit to a new bed, the system was displaying the overlapping validation message and was not allowing the client to admit to the new bed. This was happening because the inpatient visit was updated as Record deleted = Null in the ClientInpatientvisits table.

With this release, the above-mentioned issue is resolved. Now, when the Client Inpatient Visit is deleted from the UI, then the inpatient visit is updated as Record deleted = Y in the ClientInpatientvisits table. This allows the client to be admitted to the new bed.

Caseload Reassignment

Reference No	Task No	Description
11	Core Bugs # 126791	In the 'Reassignment' list screen, remove the 'Discharged' client from Program Assignment, under 'Treatment Team Role' dropdown list search.

Author: Veena Santosh

11. Core Bugs # 126791: In the 'Reassignment' list screen, remove the 'Discharged' client from Program Assignment, under 'Treatment Team Role' dropdown list search.

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

Navigation Path: Go Search – Reassignment – select Treatment Team Roles in Assignment Type dropdown – select other filter options – Apply Filter.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Reassignment screen, when the Treatment Team Roles was selected in the Assignment Type dropdown, the discharged clients were displayed in the grid.

With this release, the above mentioned issue has been resolved. Now, in the Reassignment screen, when Treatment Team Roles is selected in the Assignment Type dropdown, the discharged clients will not be displayed in the grid.

Charges/Claims

Reference No	Task No	Description
12	EII # 126076	Implementation of 2330B Loop for Other Payer Claim Control Number 837P.
13	EII # 126077	Implementation of 2330B Loop for Other Payer Claim Control Number 837I.
14	Core Bugs # 7113	Charges/Claims: The Reallocation process is transferring the charges with Charge errors.
15	Core Bugs # 126660	Billing: Claims warning error while trying to bill for secondary charge ids.
16	Core Bugs # 126798	The system is not fetching the values in the claim file under the 'CL1' segment, as per the rule added in the 'Claim Format Configuration' screen.
17	Core Bugs # 126832	The ModifierId1, ModifierId2, ModifierId3, and ModifierId4 columns in the ProcedureRates table are not being updated for the ProcedureRateId's.
18	Core Bugs # 126833	Review/revise code modifications made to 837I as part of Feature 269174.
19	Core Bugs # 127021	CORE Claims framework changes for Bundle by Custom Field value.

Author: Roopa Hemanna

12. EII # 126076: Implementation of 2330B Loop for Other Payer Claim Control Number 837P.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

This change is for the specific customers.

With this release, the 2330B Loop segment is implemented into 837 professional claims as a "custom only" segment.

Note:

- This change is specific to the customers, who are having the logic to submit the primary payers claim control number during secondary claims submission, when the secondary payer is Medicaid.

Author: Roopa Hemanna

13. EII # 126077: Implementation of 2330B Loop for Other Payer Claim Control Number 837I.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

This change is for the specific customers.

With this release, the 2330B Loop segment is implemented into 837 institutional claims as a "Custom only" segment.

Note:

- This change is specific to the customer, who is having the logic to submit the primary payers claim control number during secondary claims submission, when the secondary payer is Medicaid.

Author: Rinki Kumari

14. Core Bugs # 7113 Description: Charges/Claims: The Reallocation process is transferring the charges with Charge errors.

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

Prerequisites:

1. The client has more than 2 Plans.
2. The errors type are mapped to the Recodes category name 'CascadePayerChargeErrors' and 'CascadeChargeToLowestPriorityPayer'.

Navigation Path : 'Client' – 'Services' – 'Services' list page – Click on 'New' icon – Enter all the details – Complete the service – Click on charge hyperlink – Ledger entries – Click on Make payment-Payment Adjustment screen – Add the required details – Transfer the amount to second or third payer.

Functionality 'Before' and 'After' release:

Before this release here was the behavior. The system was transferring the charge amount through Reallocation process even though the Charges had an error.

With this release, the above-mentioned issue has been resolved. Through the Reallocation Process, the system will not transfer the charges that has an error, that are mentioned in the Recodes.

Author: Roopa Hemanna

15. Core Bugs # 126660: Billing: Claims warning error while trying to bill for secondary charge ids.

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

Prerequisites:

1. Client is associated with two Coverage Plans. i.e., Primary plan with COB Priority = 1 and Secondary plan with COB Priority =2.
2. Create two charges from the same service, the secondary charge (priority = 2) is from a secondary coverage plan.
3. The Payments and Adjustments are applied, and a secondary charge is created and billed.
4. Secondary charge ids are deleted from the service record.
5. The charge is regenerated for the secondary charge.

Navigation Path 1: 'My Office'- 'Billing' -select 'Charges/Claims' – 'Charges/Claims' list page – set "All Priorities" dropdown field to "Priorities Greater than 1" – select 'secondary plan' from Plans dropdown field – click on Apply Filter – select a secondary Charge Id – click on 'Eclaim' button -select the batch record – click on 'Process now' button – Click on 'Create Claim File' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was encountering a claims warning error while trying to bill for secondary charge ids in the system, even though the COB information was correctly balanced.

Error Message: Secondary Billing: COB information for MEDICARE FACILITY (9XC0EV9GU15) Does not balance at claim line level.

With this release, the above-mentioned issue has been resolved. Now, the logic has been modified that the system removes these deleted charges from consideration when sending the COB, stopping this error from occurring. By doing so, the user is able to eliminate the claims warning error and proceed with billing for secondary charge ids without any issues.

Author: Sahana Gururaj

16. Core Bugs# 126798 : The system is not fetching the values in the claim file under the 'CL1' segment, as per the rule added in the 'Claim Format Configuration' screen.

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

Prerequisites:

1. In the 'Plan Detail' screen, select 'HIPAA 837 Institutional' claim format from the 'Standard E Claim Format' drop-down.
2. Go to the 'Claims Format Configuration(s)' list page and click on the '837 Institutional Claim Format Id" hyperlink.

3. In the "Claim Format Configuration Details" screen, go to the 'Rules' tab and add a rule with 'Data Source' as required and the 'Data Values' as required and select the 'Format Field' as loop "2300 – CL1 – 03 – Patient status Code" in the "Claim Format Configuration Details".

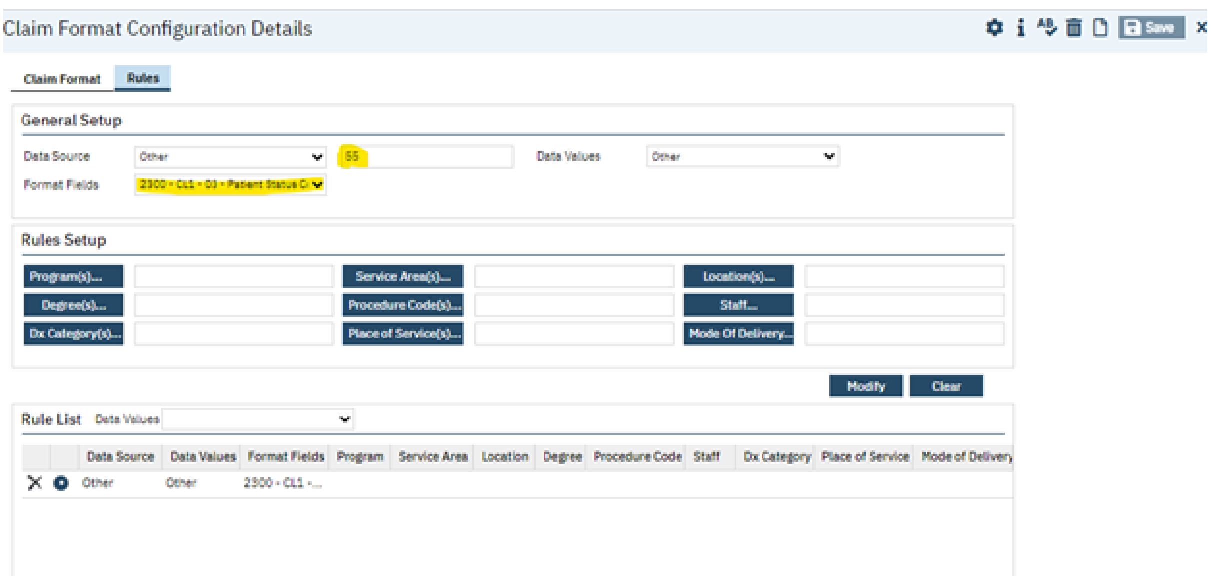
Navigation Path: 'My Office' – 'Charges/Claims' – select the required Charge ID and click on the 'E-Claim' button – click on the 'Process Now' button in the 'Claim Processing' pop-up – click on 'Create Claim File' button – click on 'Save As' button in the 'Claim File Creation' pop-up screen.

Functionality 'Before' and 'After' release:

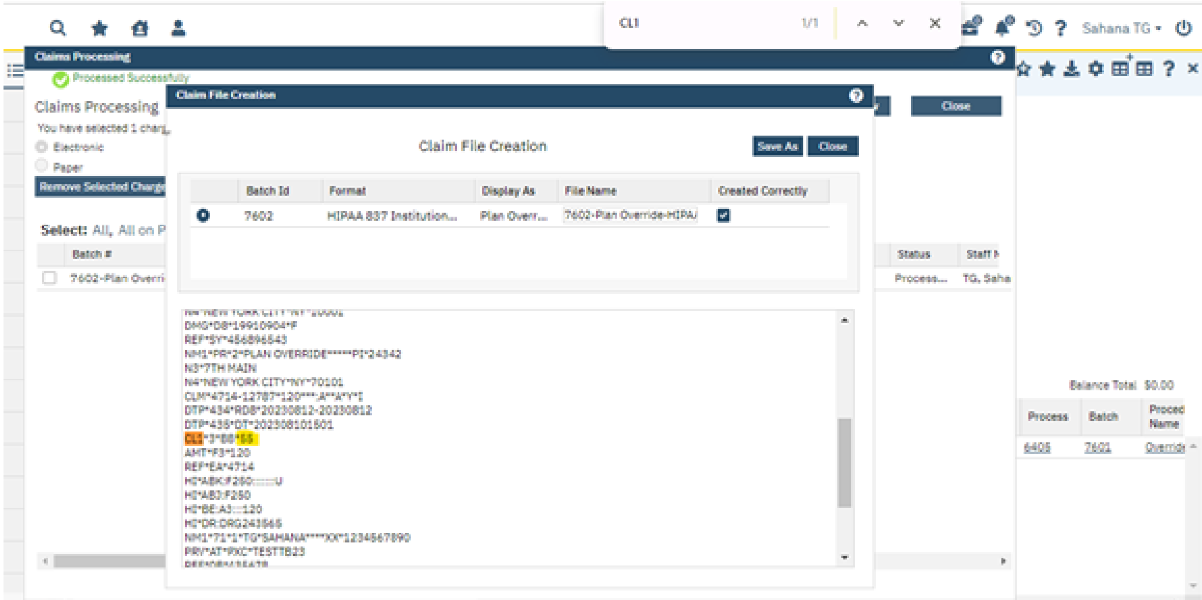
Before this release, here was the behavior. When the user added a rule with required values in the 'Data Source' and 'Data Values' as required for the loop "2300 – CL1 – 03 – Patient status Code" under the Rules tab of the 'Claim Format Configuration Details' screen, the system was not fetching the values in the claim file under 'CL1' segment, as per the rule added in the 'Claim Format Configuration' screen.

With this release, the above-mentioned issue has been resolved. Now, the system will display the correct value on the claim file under the 'CL1 – 03(Patient Status Code)' segment as per the rule added in the 'Claim Format Configuration' screen.

Screenshot of the rule in the 'Claim Format Configuration' screen.



Output on 837 Inst claim file.



Author: Debanjit Das

17. Core Bugs # 126832: The ModifierId1, ModifierId2, ModifierId3, and ModifierId4 columns in the ProcedureRates table are not being updated for the ProcedureRateId's.

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

Navigation Path: Go Search – Procedure/Rates – Procedure/Rates screen – Click on 'Import' button and select a File to upload a new Procedure Rate.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. The ModifierId1, ModifierId2, ModifierId3, and ModifierId4 columns in the ProcedureRates table are not being updated for the ProcedureRateId's during the Procedure Rate Import process. This was causing this issue to pick the rates for the Particular Modifier, specifically when the Modifier Group Name is available for the old procedure ID.

With this release, the above-mentioned issue has been resolved. Now, the ModifierId1, ModifierId2, ModifierId3, and ModifierId4 columns in the ProcedureRates table is updated correctly for the ProcedureRateId's during the Procedure Rate Import process.

Author: Rinki Kumari

18. Core Bugs # 126833: Review/revise code modifications made to 837I as part of Feature 269174.

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

Prerequisite: Program is flagged as either Inpatient or Residence by following the **Path:** 'Administration' – 'Program' list page- Click on hyperlink – Program details- 'Categories' section – select 'Residence'/'Inpatient' checkbox.

Navigation Path: 'My Office' – 'Billing' – 'Charges/Claims' – 'Charges/Claims' list page –select the required charge Id click on '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. In 837I claim file of charges/claim screen, the DTP*435 segment (InpatientAdmitDate) was generated for both outpatient and Inpatient even though the Residence/Inpatient Program checkbox was selected or unselected.

With this release, the above mentioned issue has been resolved. Now, DTP *435 segment (InpatientAdmitDate) is generated in 837I claim file of charges/claim screen for the Inpatient, if the Residence/Inpatient checkbox is selected for the Program in program details screen.

Author: Debanjit Das

19. Core Bugs # 127021: CORE Claims framework changes for Bundle by Custom Field value.

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

Navigation Path: 'Charges/Claims' list page – Select few Charge Id's and click on 'Electronic Claims' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The claims bundling was not occurring when it involved a custom field value.

With this release, the logic has been corrected to bundle the claims successfully when any custom field values are involved during bundling.

Claims

Reference No	Task No	Description
20	Core Bugs # 126805	Incorrect warning message displayed even when multiple claims were selected for Pay.
21	Core Bugs # 126983	Hourly Billing Codes not calculating properly.

Author: Renuka Gunasekaran

20. Core Bugs # 126805: Incorrect warning message displayed even when multiple claims were selected for Pay.

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

Navigation Path: 'Client' – 'Claims' – Select 'Status as approved' ,' Select Insurer and bank accounts' –Select multiple Approved claim lines – 'Select Action' – 'Pay' – 'Close' pop up – 'Select Action' – 'Pay'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user selected multiple claims and clicked on Pay in the Select Action dropdown, closed the popup and repeated the same action, an incorrect warning message 'Please select a Claim Line record to perform the action' was displayed despite having the claims selected.

After this release, the above-mentioned issue is resolved and the 'Pay' popup is displayed without any warning message when multiple claims are selected.

Author: Renuka Gunasekaran

21. Core Bugs # 126983: Hourly Billing Codes not calculating properly.

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

Prerequisite: Create a new hourly billing code by following the **path:** Administration – Care Management – Billing Codes – New – Enter 'Name','Code' – Enter Unit and Select 'Hours'.

Navigation path: Claims (My Office) – Select Claim type – select any Claim type – Select Provider, Insurer, Enter Diagnosis – Enter From with time and select 'to Date'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The units were not calculated properly for Hourly billing code in Claim Entry Screen.

With this release, the above mentioned issue has been resolved. Now, the units are calculating properly when 'Hourly Billing Code' is selected in the Claim Entry screen.

Client fees

Reference No	Task No	Description
22	Core Bugs # 126871	Client Fees List page columns are not aligned properly.

Author: Sunil Belagali

22. Core Bugs # 126871: Client Fees List page columns are not aligned properly.

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

Navigation Path: Login to SmartCare application –select any Client – 'Client Fees (Client)' List page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The columns in 'Client Fees (Client)' List page were not aligned properly. The column width was not matching with the column headers width when the screen was resized.

With this release, the above-mentioned issue is resolved. Now, the columns in 'Client Fees (Client)' List page are aligned properly. The column width is matching with the column headers width even when the screen is resized.

Client Flag

Reference No	Task No	Description
23	Core Bugs # 126830	The previously opened flags are displayed when the user opens a client with no flags.

Author: Akshay Vishwanath

23. Core Bugs # 126830: The previously opened flags are displayed when the user opens a client with no flags.

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

Prerequisite: Set The Configuration key 'ShowNewFlagIconBelowClientViewingButton' to 'No'.

Navigation Path 1: Client Search – Open any client with flags.

Navigation Path 2: Client Search – Open any client with no flags.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user opened a client with no flags, the previously opened flags were displayed for that Client.

With this release, the above-mentioned issue has been resolved. Now, the previously opened flags are not displayed when the user opens a client with no flags.

Client Information I

Reference No	Task No	Description
~~24~~	~~EII # 126291~~	~~Implemented the 'Case InformationI' section – 'Case Initiation Date' field under 'Client InformationI' screen.~~
25	Core Bugs # 126568	Release of Information Log: Un-Locking Effective Releases displays the "Ineffective" entries but disappears.

~~**Author**: Shivakanth Moger~~

~~24. EII # 126291: Implemented the 'Case InformationI' section – 'Case Initiation Date' field under 'Client InformationI' screen.~~

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

~~**Navigation Path:** Client search – Select a 'Client' – Search 'Client Information I screen – 'Foster Care' tab – 'Case Information' section.~~

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

~~**Purpose:** For Foster Care customers, to be able to enter and track specific data for their clients.~~

~~With this release, the below-mentioned section and field have been implemented in the 'Client InformationI' screen under the 'Foster Care' tab:~~

~~**Case Information section – 'Case Initiation Date' field:**~~

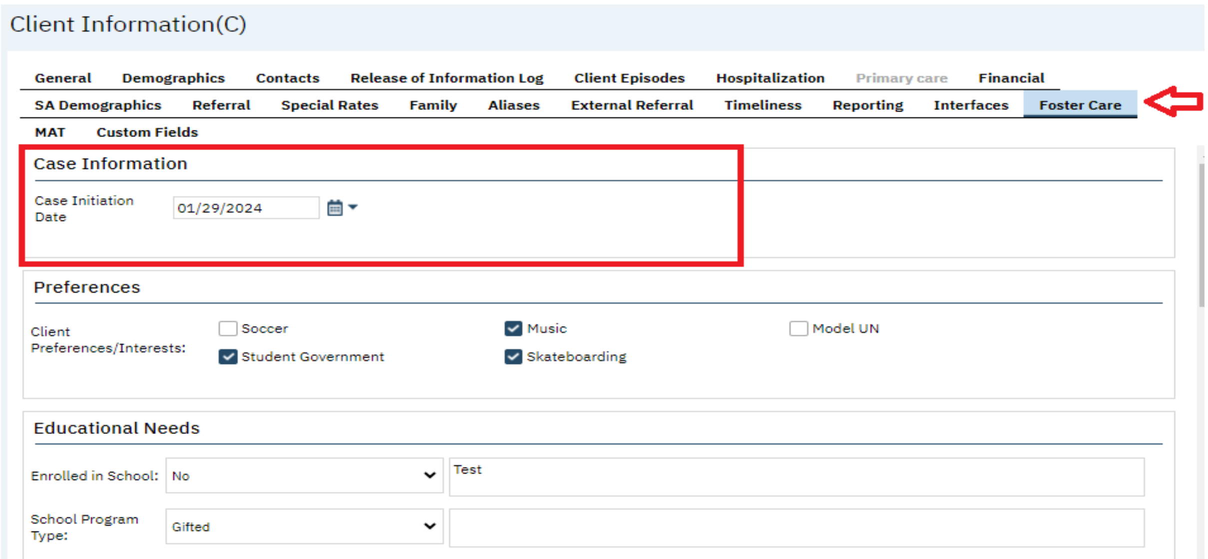
- ~~The users will be able to add the date if this field is blank.~~

- ~~If the date is available, it will display the oldest 'Case Initiation Date' from the linked Foster Care Referral for Client – Referral – Additional Information – Case Initiation Date.~~

- ~~If in case there are multiple linked Referrals for the Client, the application displays the oldest 'Case Initiation Date' value.~~

- ~~If there is no 'Case Initiation Date' value in any linked Referrals OR no linked Referral, then this field is blank.~~

- ~~If 'Case Initiation Date' exists in the Client Information, then the date will not be initialized. The users can edit/change the dates.~~



~~**Note:**~~

~~The 'Case Initiation Date' field is to capture the oldest Date for a child, who has the previous Foster Care cases open. This date will be manually entered by the user at the time of Referral.~~

Author: Ramya Nagaraj

25. Core Bugs # 126568: Release of Information Log: Un-Locking Effective Releases displays the "Ineffective" entries but disappears.

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

Navigation Path: Client Search – Client – Client Information (C) – Release Of Information Log – Insert some active and Inactive ROI records – check Show only releases that are currently effective checkbox – click on Lock icon for Active ROI records.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Release Of Information Log tab of Client Information (C) screen, when the user clicked on Lock icon in the List of Releases grid, the list was flashing inactive ROI records for few seconds.

With this release, the above-mentioned issue is resolved. Now, when the user clicks on Lock icon in the List of Releases grid, the list is not flashing inactive ROI records.

Client Orders

Reference No	Task No	Description
26	EII # 126576	Changes in the 'Pharmacy Orders' list page to identify Denied/Processed results & 'Confirmation Message' popup.
27	Core Bugs # 126691	Client Order: "Select All" checkbox disappears in the 'Order Set' tab.
28	Core Bugs # 126862	Client Orders: Order requisition cuts off NPI.
29	Core Bugs # 126868	Client Order: displaying duplicate diagnosis codes.
30	Core Bugs # 126913	"Search Adhoc" Checkbox is always checked while inserting an order in the 'Client Order' screen.
31	Core Bugs # 126918	The latest modified frequency is not displayed in the PDF.

Author: Chaitali Patil

26. EII # 126576: Changes in the 'Pharmacy Orders' list page to identify Denied/Processed results & 'Confirmation Message' popup.

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

Navigation Path 1: 'Client' search – 'Client Order' screen – Click on the 'New' icon – Type and search for a medication order – Enter the required fields – Click on the 'Sign' button.

Navigation Path 2: 'My Office' – 'Pharmacy Orders' list page – check the 'Display Processed' checkbox – Click on 'Apply Filter ' – and verify 'processed' records having a Process checkbox is 'Checked'.

Navigation Path 3: 'My Office' – 'Pharmacy Orders' list page – check the 'Display Denied' checkbox – click on 'Apply Filter' – and verify 'Denied' records having a 'Deny' checkbox is 'checked'.

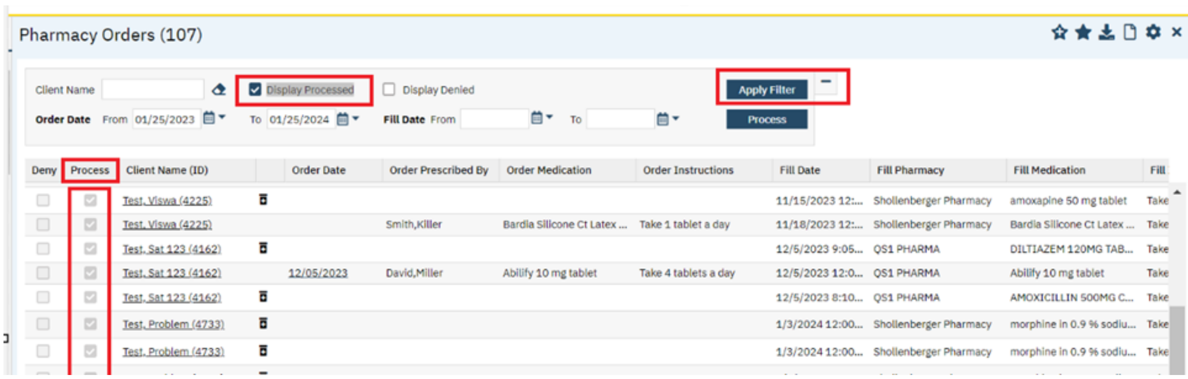
Functionality 'Before' and 'After' release:

Purpose: To identify all the transactions as processed or denied based on the checkbox selection and if the "Process" checkbox is chosen, the confirmation message popup should display.

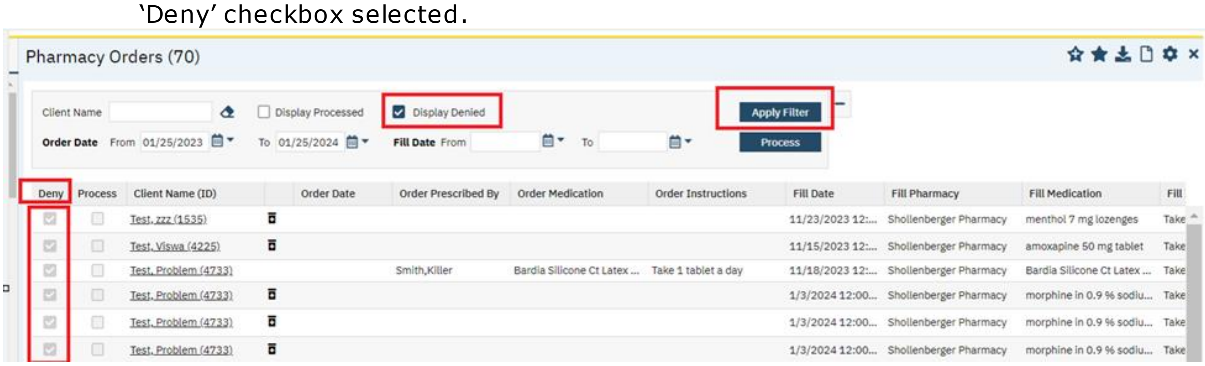
With this release, the below-mentioned changes are implemented in the 'Pharmacy Orders' list page:

- On the 'Pharmacy Order' List Page, each Record has the checkbox to identify whether it is a 'Denied' or 'Processed' record.

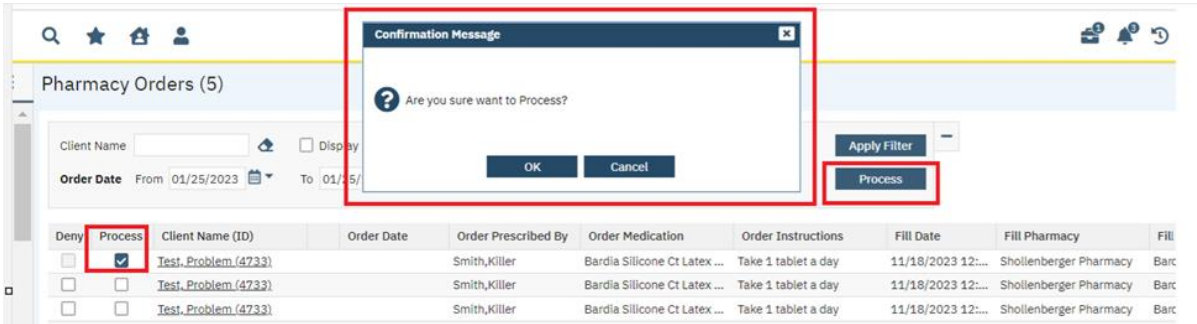
  1. On checking the 'Display Processed' checkbox, the application will display the 'Processed' records. With 'process' checkbox selected.



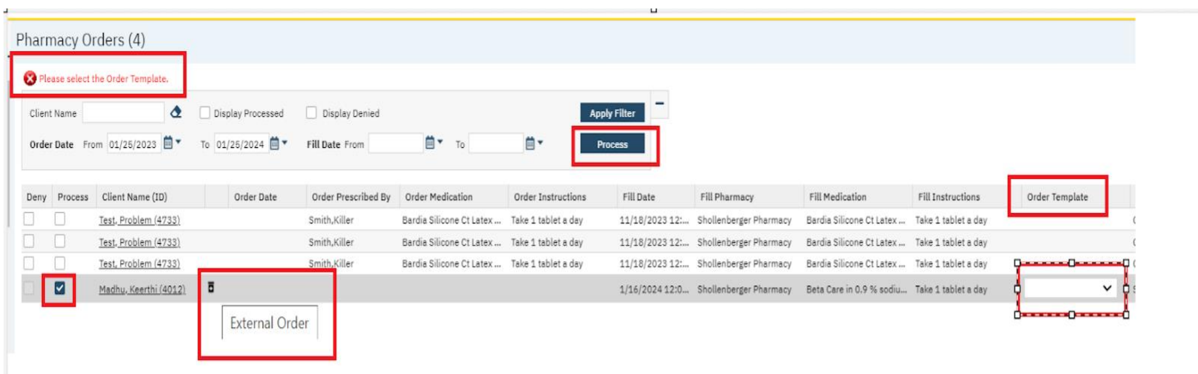
  2. After checking the 'Display Denied' checkbox, the application will display the 'Denied' records with 'Deny' checkbox selected.



3: When the user clicks on the "Process" button after checking the 'Process' checkbox for a record (please note that this record is not processed or Denied already), the confirmation message will be displayed with 'OK' and 'Cancel' button' in the 'Confirmation Message' pop-up.
On click of 'OK' button, the records are processed.
On click of 'Cancel' button, the records are not processed.



4: In the 'Pharmacy Orders' list page, when the user clicks on the 'Process' button after checking the 'Process" checkbox for a record and 'Order template frequency' is not selected for the 'External Order', then the below 'Validation message' will be displayed.
Validation Message – Please select the Order Template.



Author: Chaitali Patil

27. Core Bugs # 126691: Client Order: "Select All" checkbox disappears in the 'Order Set' tab.

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

Navigation Path 1: Go search – Order Sets (Admin) – Click on – 'New' – create one 'Order Set'.

Navigation Path 2: Perform client search – Go Search – 'Client Orders' (Client) – Click on 'New' – Navigate to 'Order Set' tab – search for 'Order Set' – verify 'Select All' check box is displaying – Navigate to – Preferences tab - again Navigate to 'Order Set' tab – search for 'Order Set'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user navigated between Order Set and Preference Tabs in Client Order Screen, "Select All" checkbox disappeared in the 'Order Set' tab.

With this release, the above-mentioned issue has been resolved. Now, when the user navigates between Order Set and Preference Tabs or any other tab in Client Order Screen, "Select All" check Box is not disappearing in the 'Order Set' tab.

Author: Chaitali Patil

28. Core Bugs # 126862: Client Orders: Order requisition cuts off NPI.

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

Prerequisite:

1. Recode Category 'GenerateReqForOrderType' for Lab, Medication, Radiology exists.
2. Signed Client Orders (Lab, Medication, Radiology) exists.

Navigation Path: Go search – select client – Client Orders (Client) – Client Orders List page - select any signed Client Orders (Lab, Medication, Radiology) - Click to download Requisition.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Client Order List page, when the user clicked on Click to download Requisition icon, the incorrect UPIN/NPI was displayed in the Electronic Requisition PDF.

With this release, the above-mentioned issue has been resolved. Now when the user clicks on Click to download Requisition icon, the UPIN/NPI field is displaying the correct UPIN/NPI in the Electronic Requisition PDF.

Author: Madhu Basavaraju

29. Core Bugs # 126868: Client Order: displaying duplicate diagnosis codes.

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

Navigation Path 1: 'Orders (Administration) – 'Orders' list page – New – Order Details – Select 'Labs' in the Order Type – Enter the codes in the 'Diagnosis' section.

Navigation Path 2: 'Client' – 'Client Orders' – New – 'Client Order' details – Search and Select 'Lab' Order – Diagnosis 1,2,3.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Client Order' details, under 'Diagnosis' section, the duplicate diagnosis codes were displayed.

With this release, the above-mentioned issue has been resolved. Now, the duplicate diagnosis codes are not displayed under the 'Diagnosis' section of Client Order details page.

Author: Sithara Ponnath

30. Core Bugs # 126913 Description: "Search Adhoc" Checkbox is always checked while inserting an order in the 'Client Order' screen.

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

Navigation Path: 'Client' – 'Client Orders' screen – Click on 'New' icon – Type and Search any order in the textbox – Select an order from the dropdown menu – Enter required data – Click on 'Insert' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Client Orders' screen, when the user clicked on the 'Insert' button, the 'Search Ad hoc' checkbox was getting selected.

With this release, the above-mentioned issue has been resolved. Now, the 'Search Ad hoc' Checkbox is not checked when the user inserts an Order in the 'Client Orders' screen.

Author: Abhishek Naik

31. Core Bugs # 126918: The latest modified frequency is not displayed in the PDF.

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

Prerequisites: Sign the Activity type order.

Navigation Path: Client – 'Client Orders' – click on new – enter required details –click on 'Sign' – click on 'New' – Select the same order from the Client Order Selection Popup and modify the frequency – Click on 'Sign' button.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. When the Activity type order Frequency was modified, the latest changes were not reflected in the PDF.

With this release, the above-mentioned issue has been resolved. Now, the latest modified frequency is reflected in the PDF.

Client Progress Note

Reference No	Task No	Description
32	Core Bugs # 126812	PC: While navigating to the 'Add-On Codes' tab and navigating back to the 'E&M Code Evaluation' tab, the added dropdown value does not retain the previously selected value under the 'EM Sign Note' pop-up of the 'Medical Progress Note' document.

Author: Shivakant Moger

32. Core Bugs # 126812 PC: While navigating to the 'Add-On Codes' tab and navigating back to the 'E&M Code Evaluation' tab, the added dropdown value does not retain the previously selected value under the 'EM Sign Note' pop-up of the 'Medical Progress Note' document.

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

Navigation Path: 'Client' search – 'Medical Progress Note' – Click on the 'New' icon – Select any 'Template' or 'Sub-Template' radio button – Select a template/Sub Template name from the pop-up – Click on the 'Ok' button – 'Medical Progress Note' document – 'Sign' – 'EM Sign Note' pop-up.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'EM Sign Note' pop-up, when the user selected the 'Override Procedure Code' dropdown in the 'E&M Code Evaluation' tab and navigated to the 'Add-On Codes' tab and navigated back the 'E&M Code Evaluation' tab, the dropdown value was not retained.

With this Release, the above-mentioned issue has been resolved. Now, when the user selects the Override Procedure Code dropdown in the 'E&M Code Evaluation' tab and navigates to the 'Add-On Codes' tab, and navigates back to the 'E&M Code Evaluation' tab under the 'EM Sign Note' pop-up of the 'Medical Progress Note' document, the dropdown selected value is retained.

Client search

Reference No	Task No	Description
33	EII # 126092	Implementation to hide and unhide Chosen name from Client Search Popup.
34	Core Bugs # 126904	Organization Radio Button in Client Search not Functioning.

Author: Akshay Vishwanath

33. EII # 126092: Implementation to hide and unhide Chosen name from Client Search Popup.

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

Navigation Path: Login to SmartCare application **-**<Client search>.

Functionality 'Before' and 'After' release:

Purpose: To view the "Provider" column in the client search pop-up. Each time, the user had to scroll to the right to see the provider.

With this release,

1. 'ShowHideAdditionalColumnsonClientSearchPopUp' Recode Category has been renamed to 'ShowAdditionalColumnsOnClientSearchPopup'. This recode category is used to show/hide additional columns like 'Primary Insured ID', Primary Plan, Sex, Race, Marital Status, Primary Language, Alias, Chosen Name on Client Search Pop Up.

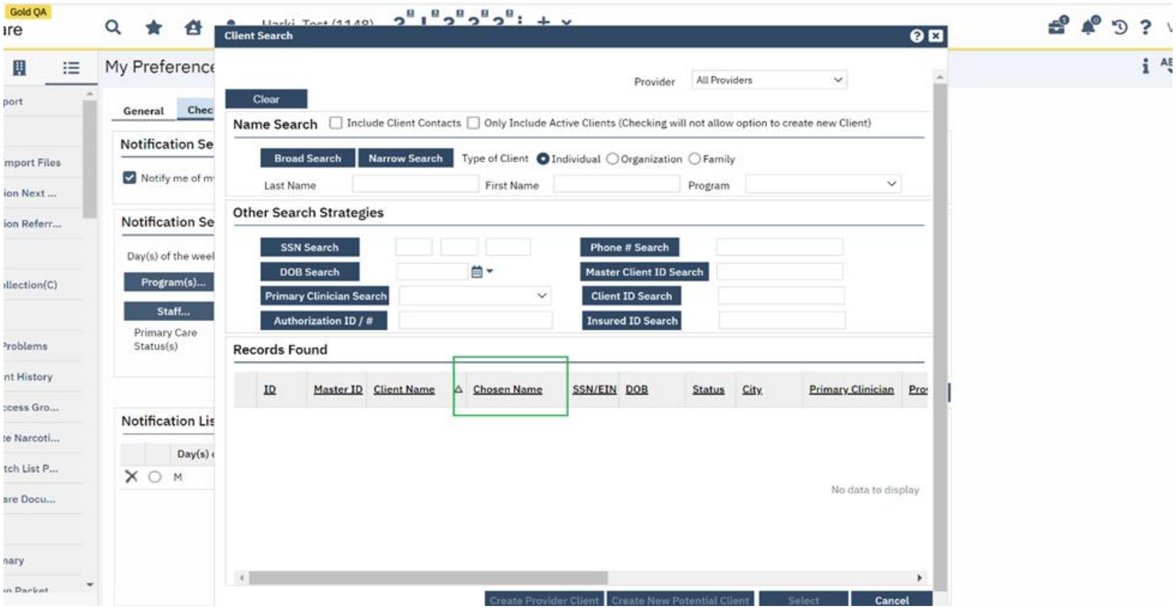
2. The description is modified as mentioned below in the recodes. The 'Chosen Name' column is added to the additional column list.

   Description: This Recode Category is used to show additional columns like (Primary Insured ID, Primary Plan, Sex, Race, Marital Status, Primary Language, Alias, and Chosen Name) on the Client Search pop-up.

   All the columns that are mapped to this recode will display after the original 9 columns that already exist on the client search pop-up, except Chosen Name.

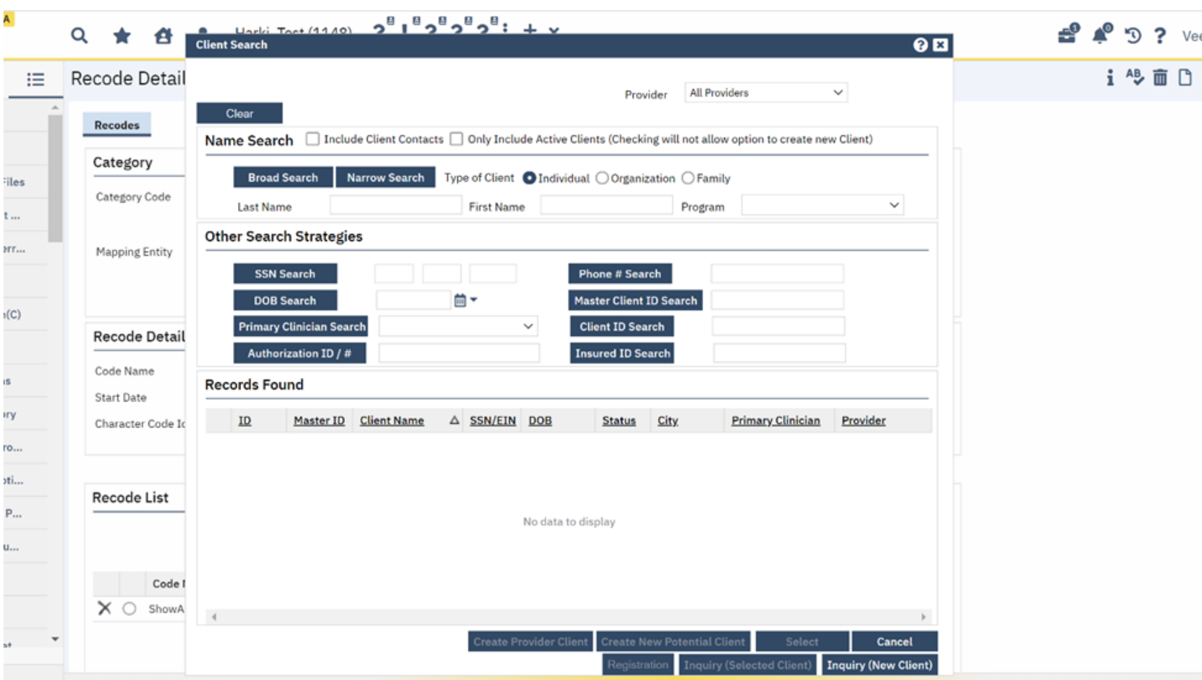
- Chosen Name column will be displayed when,
- From date and End date is specified in recode.
- From date is specified and End date is kept empty.

Screenshot when Chosen Name column is displayed:



The Chosen Name column in the 'Client search Popup' will be hidden when From date and End date is not specified in the recode or once the end date is expired for the particular column.

Screenshot when Chosen Name column is hidden:



Author: Akshay Vishwanath

34. Core Bugs # 126904: Organization Radio Button in Client Search not Functioning.

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

Navigation Path 1: Login to SmartCare - Client Search - Client Search pop up – Select Organization radio button and enter Organization name, EIN, DOB and click on All Client Search button – Click on Create New potential client.

Navigation Path 2: Client Search - Select Organization radio button and enter Organization name, EIN,DOB (created in Navigation Path 1) and click on All Client Search button.

Navigation Path 3: Client Search - Select Organization radio button and Enter the DOB details and Click on DOB search button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below issues were observed in Client Search pop up:

When the user tried to search the already created Organization Name by clicking on All Client Search button, the below mentioned validation message was displayed:

Validation message: Please make sure to enter Organization Name, DOB, EIN for All Client Search

When the user tried to search an organization client using DOB details, both the Individual and the Organization client details were displayed.

With this release, the above-mentioned issues have been resolved. Now, in the Client Search pop up:

1. When the user tries to search the already created Organization Name by clicking on All Client Search button, the Validation message is not displaying, and the Organization name is displaying.

2. When the user tries to search organization client using DOB details, then only the Organization client details are displayed.

CM Events

Reference No	Task No	Description
35	Core Bugs # 126990	CM Events: The provider selected in the Events tab is not reflected to the Notes tab for the next new authorization screen of the client.

Author: Renuka Gunasekaran

35. Core Bugs # 126990: CM Events: The provider selected in the Events tab is not reflected to the Notes tab for the next new authorization screen of the client.

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

Navigation Path 1: Login as Staff 1 – Select 'Client (Client 123)' – 'CM Events' – 'New' – 'Event Details' – Select 'Authorization Request' – Select Status as 'In-Progress', Select 'Insurer', Select 'Provider' – Select 'Notes' tab – Fill required fields and Save and sign.

Navigation Path 2: Login as Staff 2 – Select 'Client (Client 123)' – 'CM Events'-'New' icon – 'Event Details' – Select 'Authorization Request' – Select Status as 'In-Progress', Select 'Insurer', Select 'Provider' – Select 'Notes' tab – 'Provider' field.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the CM Events screen, for the next new Authorization request of the client, the provider selected on the Events tab was not reflected to the Notes tab. Instead, the different provider (which was selected from the previous Authorization Request) was displayed.

With this release, the above mentioned issue has been resolved. Now, the provider selected in the Events tab is reflected to the Notes tab for the next new authorization request of the client, in CM Events screen.

Coverage

Reference No	Task No	Description
36	Core Bugs #126802	The pop up name is renamed in the Coverage Screen.
37	Core Bugs #126941	Coverage Screen : Error message was displayed when the user tried to enter the End date manually in the Set End Date Control field.

Author: Lakshmi kumarappan

36. Core Bugs #126802: The pop up name is renamed in the Coverage Screen.

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

Navigation Path: Client- Coverage – Plan Time Spans section—Add information icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked on the 'Add information icon' in the 'Coverage' screen, the pop up named 'SmartCare' was displayed.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on the 'Add information icon' in the 'Coverage' screen, the pop up named 'SmartCare_MSPReason' is displayed.

Author: Abhishek Naik

37. Core Bugs # 126941: Coverage Screen : Error message was displayed when the user tried to enter the End date manually in the Set End Date Control field.

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

Navigation Path: Client-Coverage – Plan Time Spans section -Set End Date calendar control.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Plan Time Spans section of the Coverage screen, when the user tried to enter the End date manually in the Set End Date Control field, the below-mentioned error message was displayed.

Error Message: Fill end date.

With this release, the above-mentioned issue has been resolved. Now, the user can enter the End date manually in the Set End Date control field under the Plan Time Spans section of the Coverage screen, without any error message.

Disclosure/Request

Reference No	Task No	Description
38	Core bugs # 126810	Disclosure/Request Details' screen: "Request From" And "Disclosed To" Fields are disabled.

Author: Ramya Nagaraj

38. Core Bugs # 126810: 'Disclosure/Request Details' screen: "Request From" And "Disclosed To" Fields are disabled.

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

Prerequisite: In 'My Preferences' screen, set 'Client Page Preference' dropdown to "Client Dashboard".

Navigation Path: 'Client' – 'Disclosures/Requests' – Client on New icon – 'Disclosure/Request Details' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Disclosure/Request Details' screen, the "Request From" And "Disclosed To" fields were getting disabled once the values were selected for these fields and saved.

With this release, the above mentioned issue has been resolved. Now "Request From" And "Disclosed To" fields are not disabled after the value selection and save.

Document Codes Detail

Reference No	Task No	Description
39	EII # 125928	Added 'Show Encounter Form' field in Document Codes Detail screen.

Author: Akshay Vishwanath

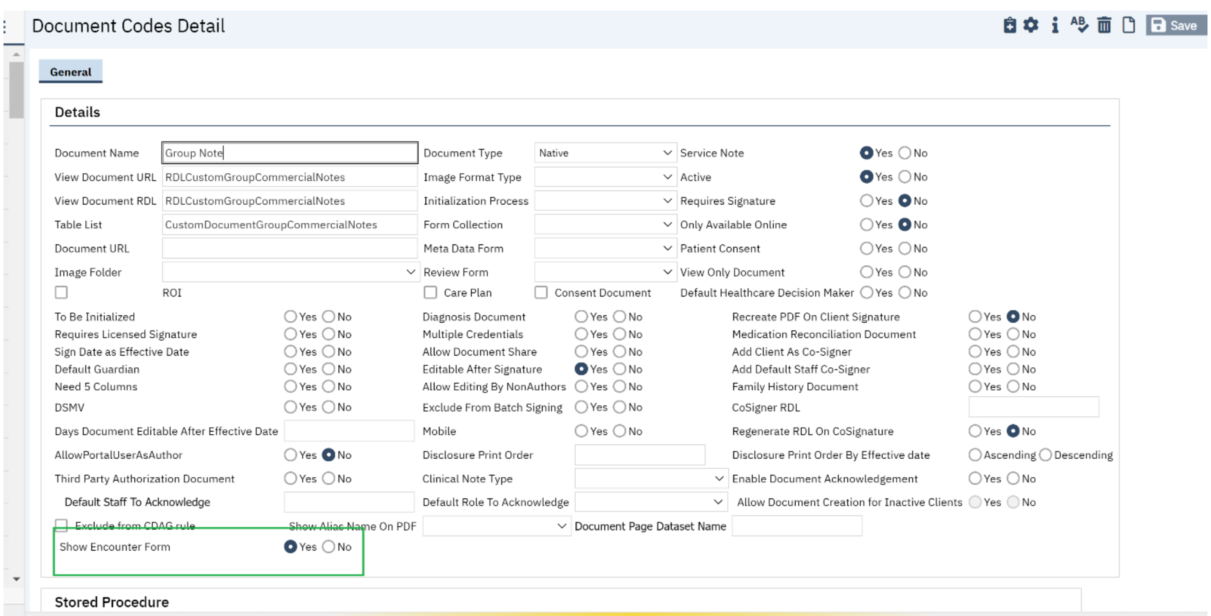
39. EII # 125928: Added 'Show Encounter Form' field in Document Codes Detail screen.

Release Type: Change | **Priority:** Onfire

Navigation Path: Administration – 'Document Codes' – 'Document Codes' list page – Select any document – 'Document Code Detail' screen – 'Details' section.

Functionality 'Before' and 'After' release:

With this release, a new field called 'Show Encounter Form' has been added with 'Yes' and 'No' radio buttons in the 'Document code detail' screen to display Encounter Form tab in service note.



Documents

Reference No	Task No	Description
40	EII # 3370	Implementation of Configuration key to Prevent future signing on document.
41	EII # 125759	Implementation of new 'Rapid Opioid Dependence Screen' document.
42	EII # 126304	Changes are implemented to the new version(edit) of the Goal Plan document to prevent duplicate client orders.
43	EII # 126431	Implementing a new 'Encounter Form' document with the required field with validations.
44	EII # 126731	Implemented a new standalone 'C-SSRS Risk Assessment (Lifeline) v3' document and "Risk and Protective Factors" tab is replaced to 'C-SSRS Risk Assessment (Lifeline) v3' tab with functionality.
45	EII # 126815	Custom hook has been added to the files to display a custom field tab in the 'Agency/Program Discharge' document.
46	Core Bugs # 125855	Multiple issues observed in the Program Assignments.
47	Core Bugs # 126690	The checkboxes checked in the current medication section are not retained.
48	Core Bugs # 126702	'Consent To Treat' PDF document: Custom document PDF format displayed instead of DFA format.
~~49~~	~~Core Bugs # 126769~~	~~National Outcome Measures(NOMS) screen: The incorrect tab is enabled and an Invalid validation message is displayed.~~
~~50~~	~~Core Bugs # 126784~~	~~The vitals from the Flowsheet is not showing in the NOMS (National Outcome Measure) document based on the date~~
51	Core Bugs # 126801	'Family Meal Menu' document PDF: 'Meal Choice' field's value displayed as numbers.
52	Core Bugs # 126870	Documents: All the entered details are not displayed in the 'DLA 20 Youth' document PDF.

~~53~~	~~Core Bugs # 126897~~	~~PC: Medical Progress Note: The user is unable to navigate back to the 'Medical Progress Note' screen from some other screen.~~
54	Core Bugs # 126955	User was able to Sign the Documents without selecting any Program when the respective Document Codes had 'Exclude from CDAG rule' checkbox had null value.
55	Core Bugs # 126970	Diagnosis Duplicating in Diagnosis List of Dx Document.
56	Core Bugs # 127023	Template(s): The tag names did not appear in the suggestions.

Author: Kiran Tigarimath

40. EII # 3370: Implementation of Configuration key to Prevent future signing on document.

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

Navigation Path 1: 'Client' – 'Documents'.

Navigation Path 2: 'Administration' – 'Configuration keys' screen.

Functionality 'Before' and 'After' release:

Purpose: The Staff not to have the ability to enter a future effective date on any documents within SmartCare.

With this release, a new configuration key is implemented to prevent signing of documents with future dates.

System Configuration Key Details:

Key Name: AllowFutureEffectiveDateInDocuments

Read Key as: Allow Future Effective Date In Documents.

Default Value: Yes

Allowed Values: Yes, No.

Modules: SCM SmartCare Platform and Framework/Document Framework

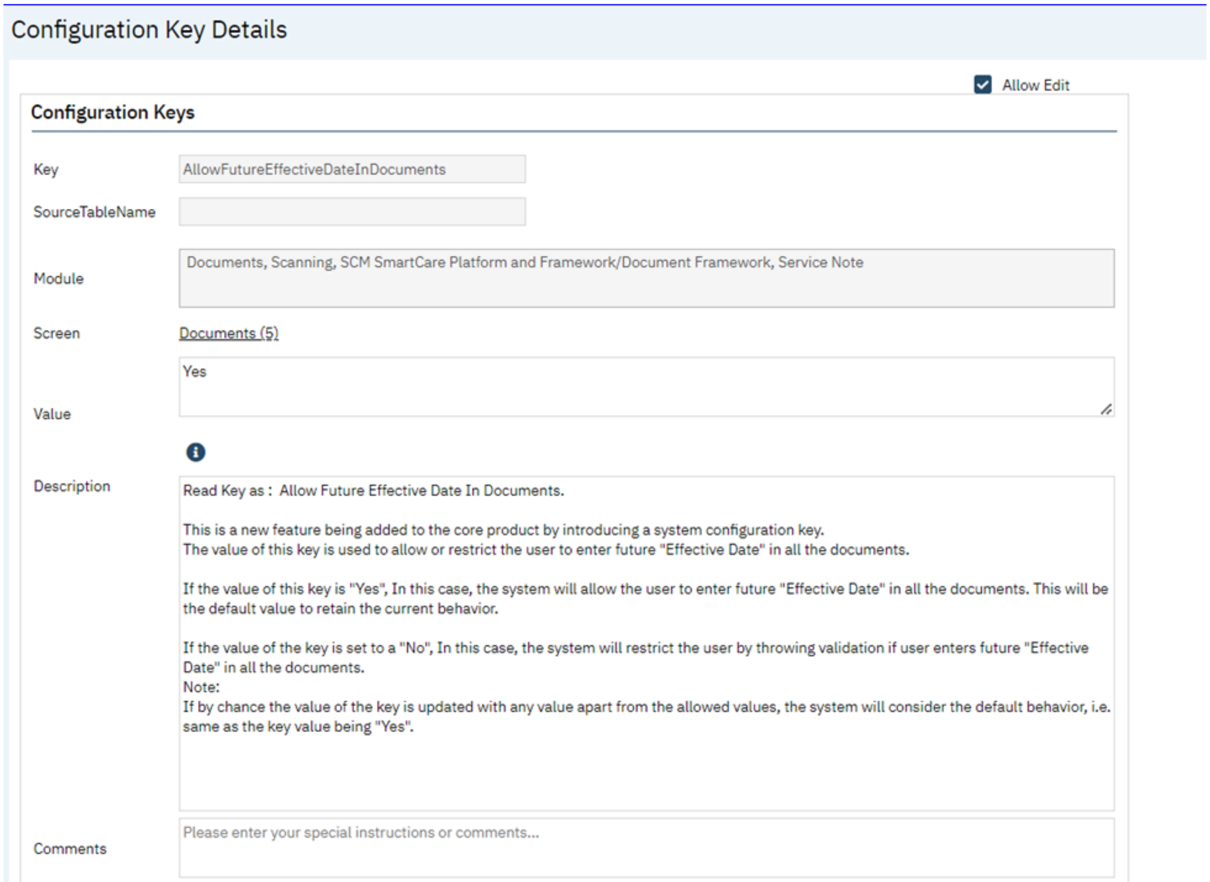
Description:
This is a new feature being added to the core product by introducing a system configuration key. The value of this key is used to allow or restrict the user to enter future "Effective Date" in all the documents.

If the value of this key is "Yes", in this case, the system will allow the user to enter future "Effective Date" in all the documents. This will be the default value to retain the current behavior.

If the value of the key is set to a "No", in this case, the system will restrict the user by throwing validation if user enters future "Effective Date" in all the documents.

Note:

If by chance the value of the key is updated with any value apart from the allowed values, then the system will consider the default behavior, i.e. same as the key value being “Yes”.


Configuration Key Details

Allow Edit

Configuration Keys

Key: AllowFutureEffectiveDateInDocuments

SourceTableName:

Module: Documents, Scanning, SCM SmartCare Platform and Framework/Document Framework, Service Note

Screen: Documents (5)

Value: Yes

Description: Read Key as : Allow Future Effective Date In Documents.

This is a new feature being added to the core product by introducing a system configuration key.
The value of this key is used to allow or restrict the user to enter future "Effective Date" in all the documents.

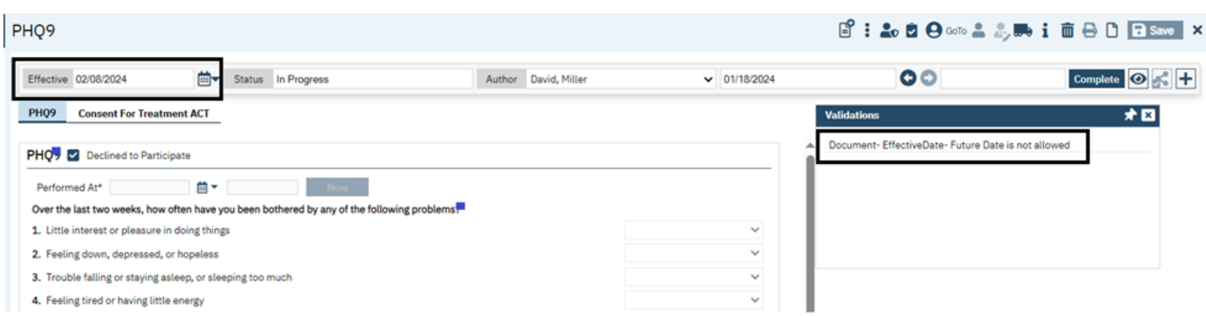
If the value of this key is "Yes", In this case, the system will allow the user to enter future "Effective Date" in all the documents. This will be the default value to retain the current behavior.

If the value of the key is set to a "No", In this case, the system will restrict the user by throwing validation if user enters future "Effective Date" in all the documents.
Note:
If by chance the value of the key is updated with any value apart from the allowed values, the system will consider the default behavior, i.e. same as the key value being "Yes".

Comments: Please enter your special instructions or comments...

- When the configuration key ‘AllowFutureEffectiveDateForDocuments’ is set to ‘No’ and the user tries to sign a document with the future date, then the below-mentioned validation message will be displayed.

Validation Message: “Document – Effective Date – Future Date is not allowed”.



- When the configuration key ‘AllowFutureEffectiveDateForDocuments’ is set to ‘Yes’, then the user can sign the document with any future date and the validation message will not be displayed.

Author: Praveen Gangadhara

41. EII # 125759: Implementation of new 'Rapid Opioid Dependence Screen' 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: New Functionality | **Priority:** On Fire

Navigation Path: 'Client' search – 'Documents' – 'Rapid Opioid Dependence Screen' document.

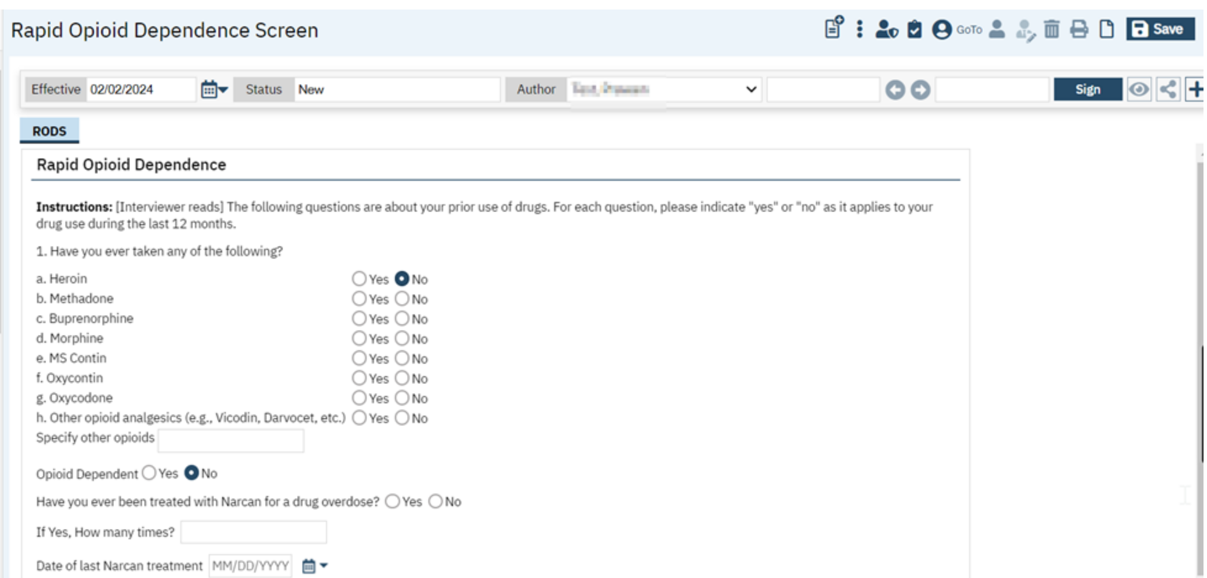
Functionality 'Before' and 'After' release:

Purpose: To support rapid assessment of individuals experiencing incarceration with HIV to allow buprenorphine induction on the day of release, if necessary**.**

With this release, a new document 'Rapid Opioid Dependence Screen' has been implemented as mentioned below:

In **'Rapid Opioid Dependence Screen'** consists of a single tab namely '**RODS'** and with a section named '**Rapid Opioid Dependence'**.

In '**Rapid Opioid Dependence**' section consists of the below mentioned fields:



"**Instructions:** [Interviewer reads] The following questions are about your prior use of drugs. For each question, please indicate "yes" or "no" as it applies to your drug use during the last 12 months." As a label.

'**1. Have you ever taken any of the following?**' field consists of the following options with **Yes**, **No** radio buttons:

a. Heroin

b. Methadone
c. Buprenorphine
d. Morphine
e. MS Contin
f. Oxycontin
g. Oxycodone
h. Other opioid analgesics (e.g., Vicodin, Darvocet, etc.)

'Specify other opioids': This is a text box field. This will be enabled only if the 'Other opioid analgesics (e.g., Vicodin, Darvocet, etc.)' field value is selected as 'Yes', else it will be disabled.

Note:

a. All the above options will initialize as value 'Yes' from the 'Assessment document's – 'Substance Abuse' tab.
b. Initialization will work only for signed (Assessment document) within the last 12 months, or else it won't initialize.
c. All the above values radio button fields consist of 'Yes' and 'No' values.
d. If any of the options are selected as 'Yes', then only questions from 2 to 8 are displayed, else it will be hidden.

'Opioid Dependent': This is a radio button field, consisting of 'Yes' and 'No' as values. This will auto-select the values 'Yes/No' based on the score as mentioned below:

- If the 'Opioid Dependent' Score is >3, then the 'Opioid Dependent' radio button will be initialized as "Yes".
- If the Opioid Dependent Score is <2, then the 'Opioid Dependent' radio button will be initialized as "No".

'Have you ever been treated with Narcan for a drug overdose?': This is a radio button field, consisting of 'Yes' and 'No' as values.

'If Yes, How many times?': This is a text box field with a max length of 3 digits only.

'Date of last Narcan treatment': This is a date control field that displays the date in 'MM/DD/YYYY' format.

For the field such as **'Have you ever been treated with Narcan for a drug overdose?', if selected as 'Yes' radio button, for 'How many times?', and 'Date of last Narcan treatment' radio options** have a validation logic where the user can turn 'On' or 'Off'. As per this release, we will be sending as 'Off'.

Note: If any of the options (Heroin, Methadone, Buprenorphine etc.) are selected as 'Yes', then the questions from 2 to 8 are only displayed.

2. Did you ever need to use more opioids to get the same high as when you first started using opioids?' : This is a radio button field, consisting of 'Yes' and 'No' as values.

3. Did the idea of missing a fix (or dose) ever make you anxious or worried?': This is a radio button field, consisting of 'Yes' and 'No' as values.

4. In the morning, did you ever use opioids to keep from feeling dope sick or did you ever feel dope sick?': This is a radio button field, consisting of 'Yes' and 'No' as values.

5. Did you worry about your use of opioids?': This is a radio button field, consisting of 'Yes' and 'No' as values.

6. Did you find it difficult to stop or not use opioids?': This is a radio button field, consisting of 'Yes' and 'No' as values.

7. Did you ever need to spend a lot of time/energy on finding opioids or recovering from feeling high?': This is a radio button field, consisting of 'Yes' and 'No' as values.

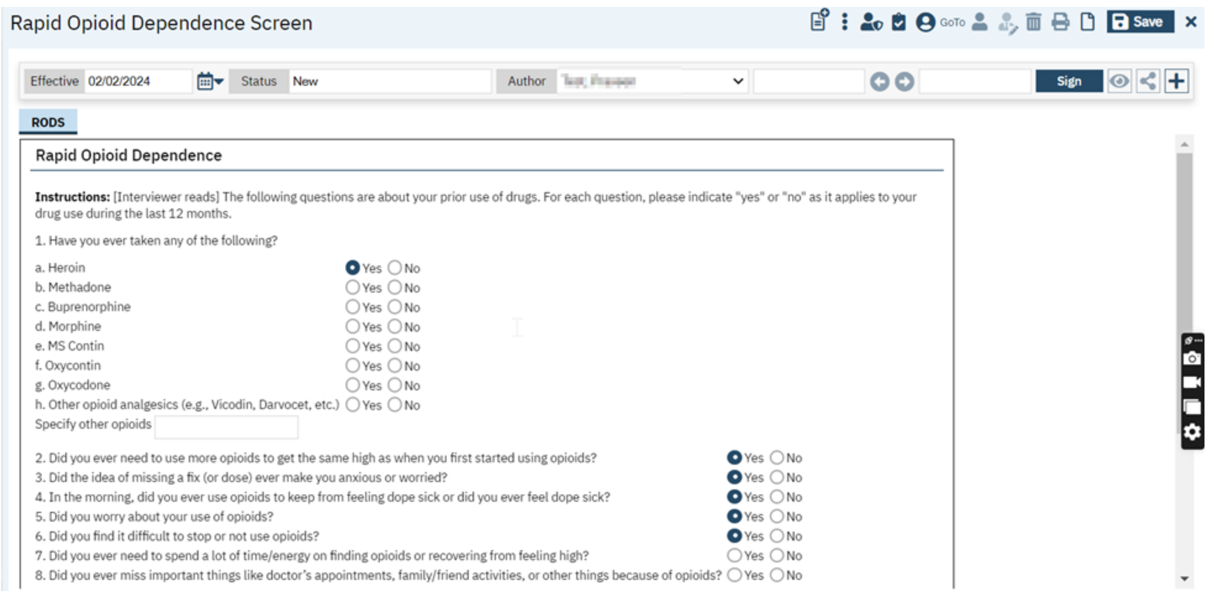
8. Did you ever miss important things like doctor's appointments, family/friend activities, or other things because of opioids?': This is a radio button field, consisting of 'Yes' and 'No' as values.

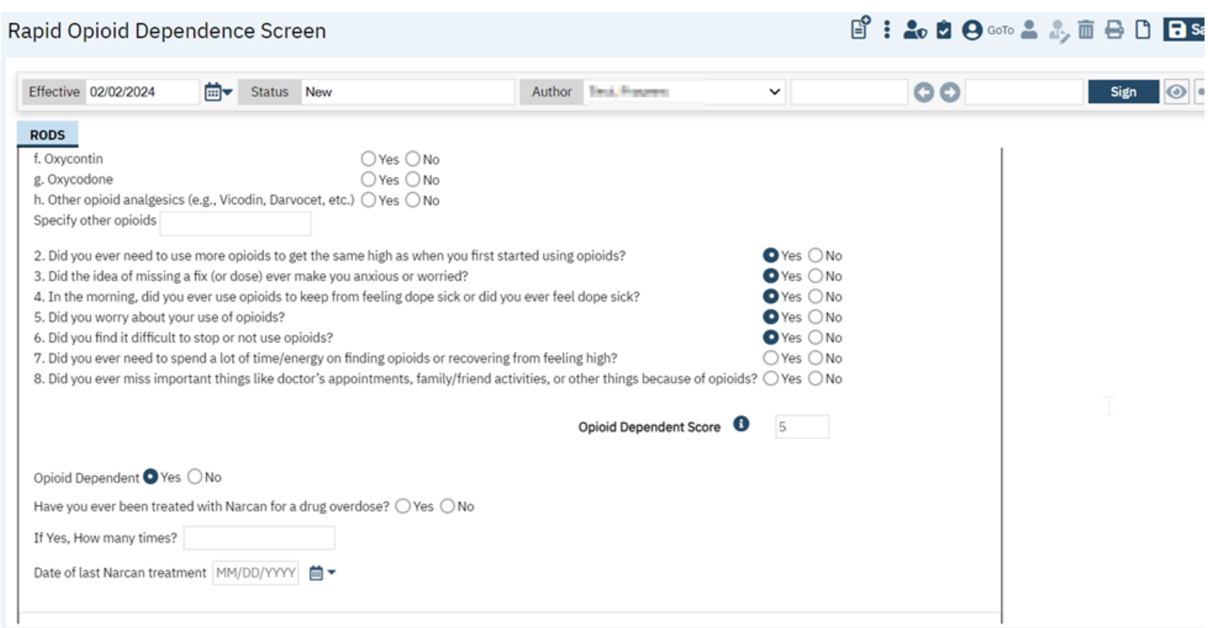
'Opioid Dependent Score': This is a text box field, it will be disabled. The score based on Questions 2 to 8 are displayed, using the scoring logic mentioned below:

a) Scoring logic: Yes = 1; No = 0.

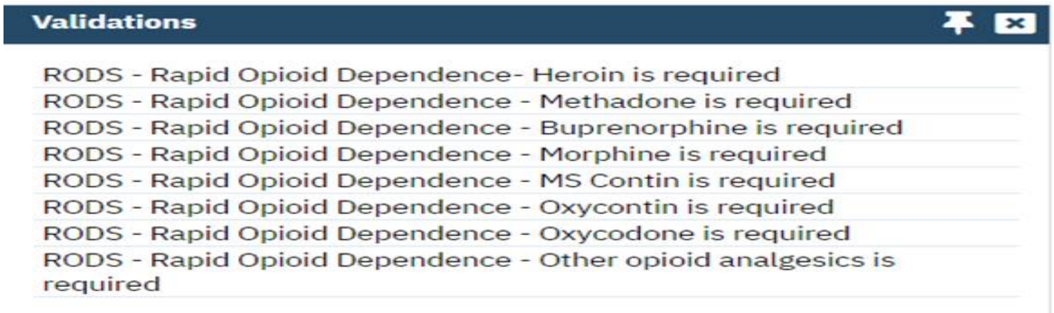
b) **'Opioid Dependent Score'** has an 'i' icon, on mouse hovering over, it will display text as "If the total is >3, then the client is 'opioid dependent'. If the total is<2, then the client is 'not an opioid dependent'."

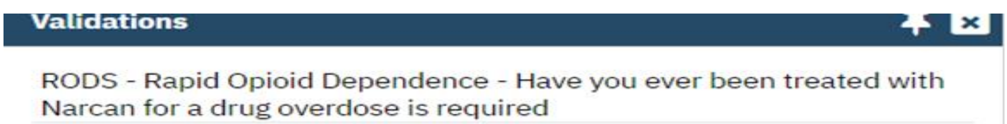
Screenshot:

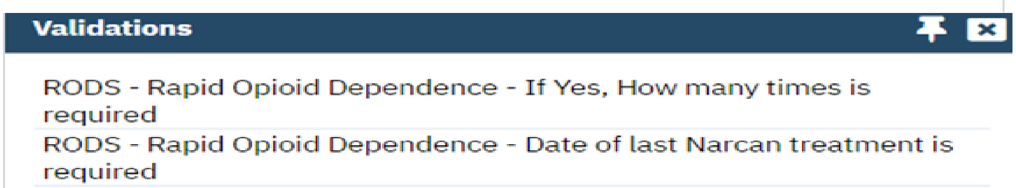




Validation messages will display as follows:







Author: Archana Govindappa

42. EII # 126304: Changes are implemented to the new version(edit) of the Goal Plan document to prevent duplicate client orders.

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

Prerequisite: Create an order by following the **path:** Orders (Administration) – Click on New – Select 'Activity' from Order Type dropdown – Fill all the required fields – Save.

Navigation Path 1: Client Search-Goal Plan (Client) – Skill Development Area /Needs / Activities – Fill all the required fields – Save – Sign -Click on 'edit' icon.

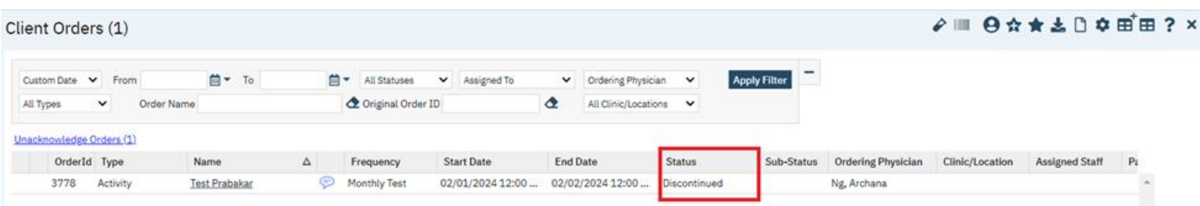
Navigation Path 2: Client Search – Client orders.

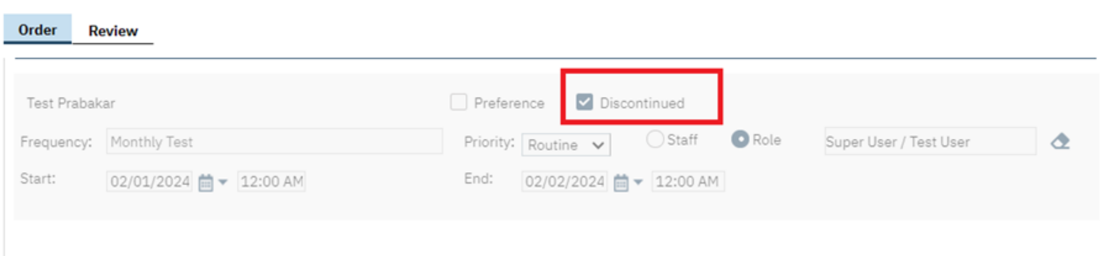
Functionality 'Before' and 'After' release:

With this release, while editing the Goal Plan document, the post signature logic will not create a duplicate 'Client order' for all activities listed on the Goal Plan documents.

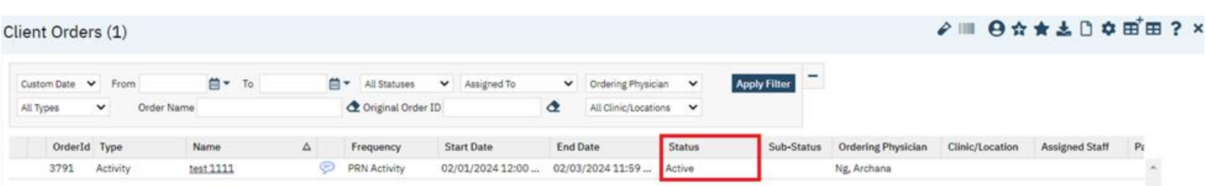
While updating the existing activity by Signing the Goal plan document with 'Review Status' as 'Discontinued', the respective client orders will get updated with the status as 'Discontinue' and the discontinued checkbox will be checked.

Client Order screen:



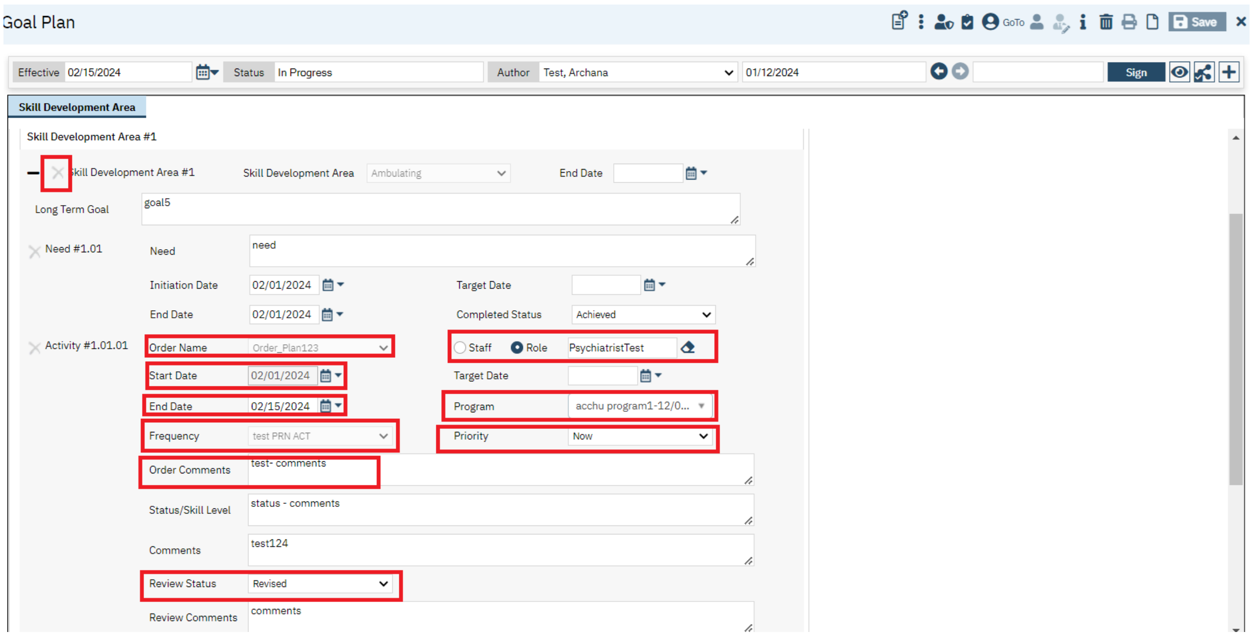


When the Activities are updated/created with the Review Status as Continued, Revised, Extended, or Achieved in Goal plan document, the client order will be created with the Status as 'Active'.



Goal Plan Document:

Activity details:



Order Name: This field is read only for updated/Edited document version.

Start Date: This field is read only for updated/edited document versions.

Staff: If updated on the Goal plan document, then update the linked 'Client Order' details.

Role: If updated on the Goal plan document, then update the linked 'Client Order' details.

End Date: 'Client Order' must be discontinued if the 'End Date' is having following conditions.

- End date = Today's date and Review Status = Discontinue in the Goal Plan document, then update the associated 'Client Order' in the 'Client Orders' screen to be End date = today's date and order status = Discontinue.
- If the End Date = Future Date and Review Status = Discontinue in the Goal Plan document, then on sign of the Goal Plan, discontinue the 'Client order'.

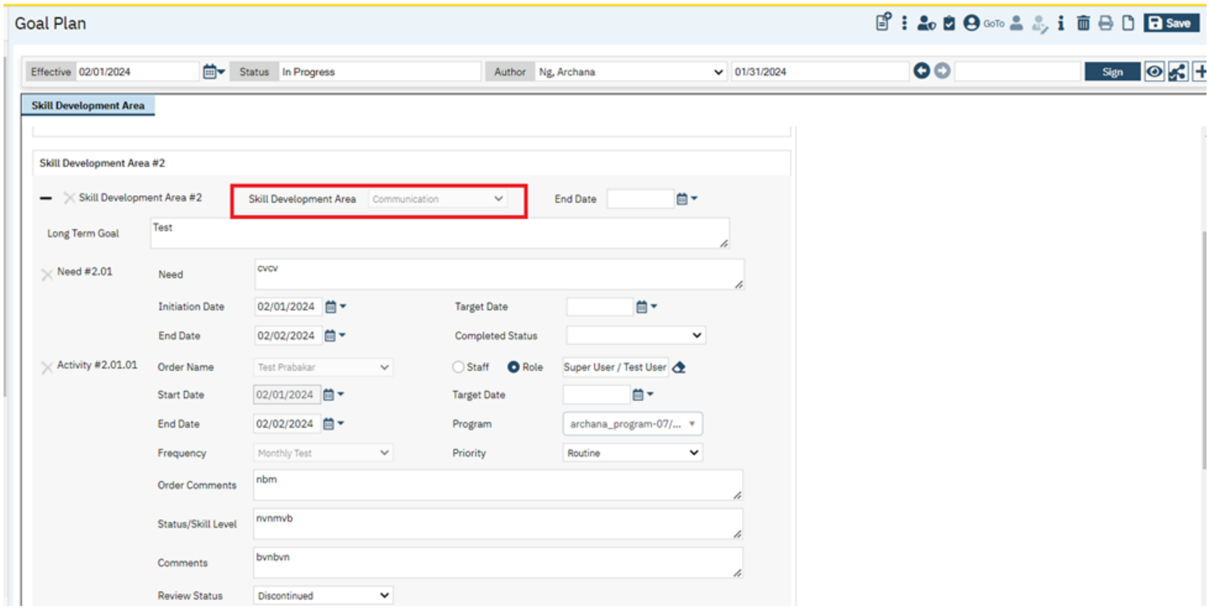
Program: If updated on the Goal plan document, then update the linked 'Client Order' details

Frequency: This field is read only for updated/edited document versions.

Priority: If updated on the Goal plan document, then update the linked 'Client Order' details

Order Comments: If updated on the Goal plan document, then update the linked 'Client Order' details.

'x' remove icon: This icon is disabled for the activity that was initialized from the last signed Goal Plan document, which will not allow the removal of the activity and any associated 'Need' and 'Skills Development Area' record associated with the 'Activity'.



Skill Development Area: It is a dropdown field, when a Skills Development Area is created, and has an associated Activity that is linked to a client order, then the Skills Development Area drop down will be disabled.

Validations Message:

Start Date: If the start date is blank, then the validation message " Start date is required" is displayed.

End Date: If a date is entered that is before today's date, then the validation message "End Date cannot be in the past" is displayed.

Author: Akshay Vishwanath

43. EII # 126431: Implementing a new 'Encounter Form' document with the required field with validations.

Release Type: New Functionality | **Priority**: On Fire

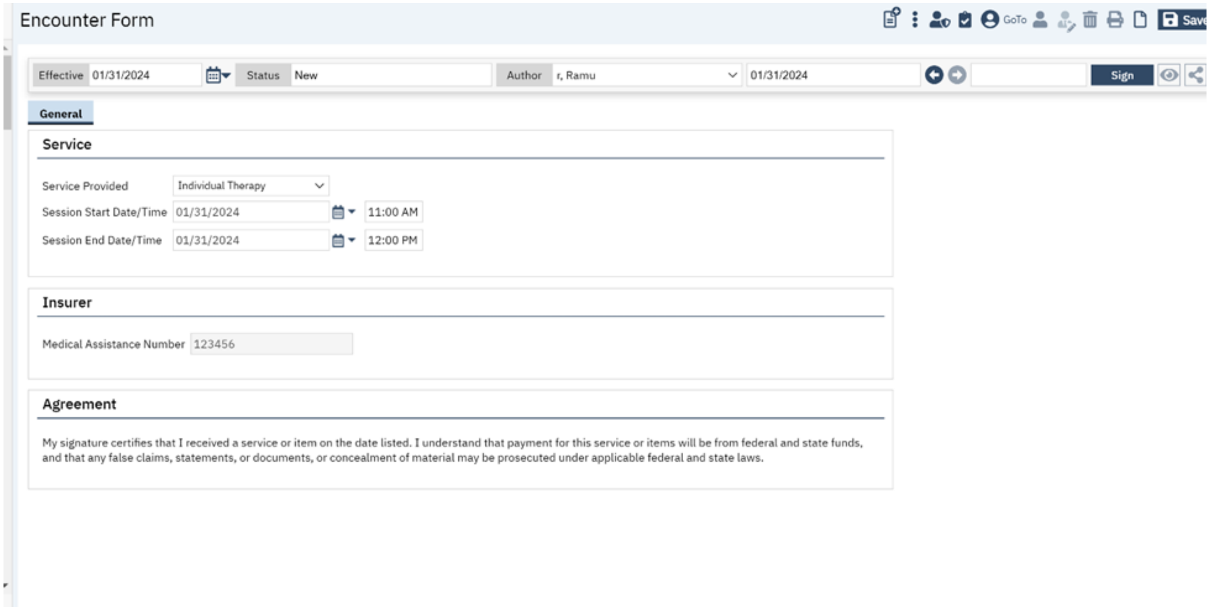
Navigation Path: – Client' search – 'Documents' – 'Encounter Form' document.

Functionality 'Before' and 'After' release:

Purpose: This document is implemented to obtain a signature from client after every service to certify that the service has been provided and/or received.

With this release, a new 'Encounter Form' document has been implemented with the required fields and respective validations as mentioned below.

Encounter Form:



General tab: It contains the following sections:

Service

Insurer

Agreement Section

'Service' Section: In this section, the below-mentioned fields will be displayed.

- **Service Provided** – This is a dropdown field and it will bind the values from the Global Code Category **"ENCOUNTERTYPE".**
- **Session Start Date/Time:** This is a Date/Time control field. The session Start Date is required when the Session Start time is given.
- **Session End Date/Time:** This is a Date/Time control field. The session End Date is required when the Session End time is given.

'Insurer' Section: In this section, the below-mentioned fields will be displayed:

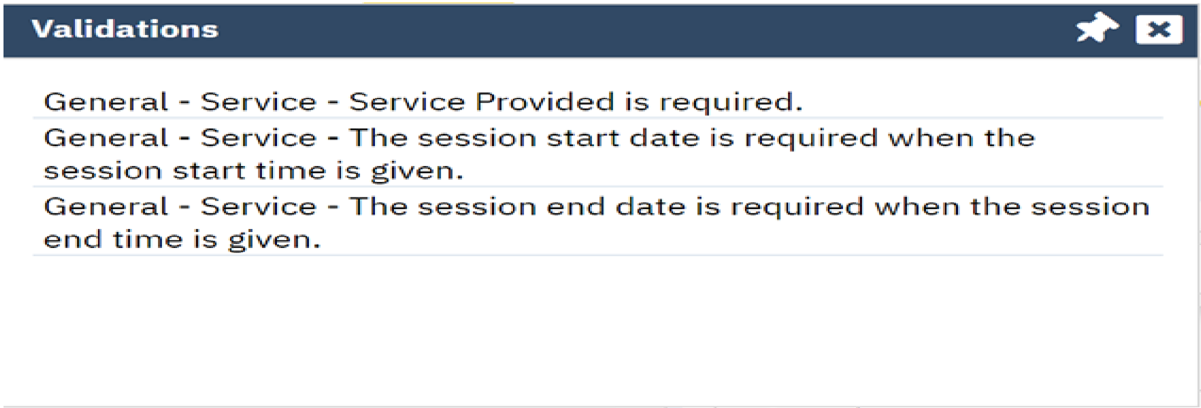
- **Medical Assistance Number:** This is a non-editable field and 'Medical Assistance Number' will be pulled from 'Client Plans' – Insured ID of Client's Primary Coverage.

'Agreement' Section: In this section, the below-mentioned text Label will be displayed. Since this is DFA, the users can change the label on their own.

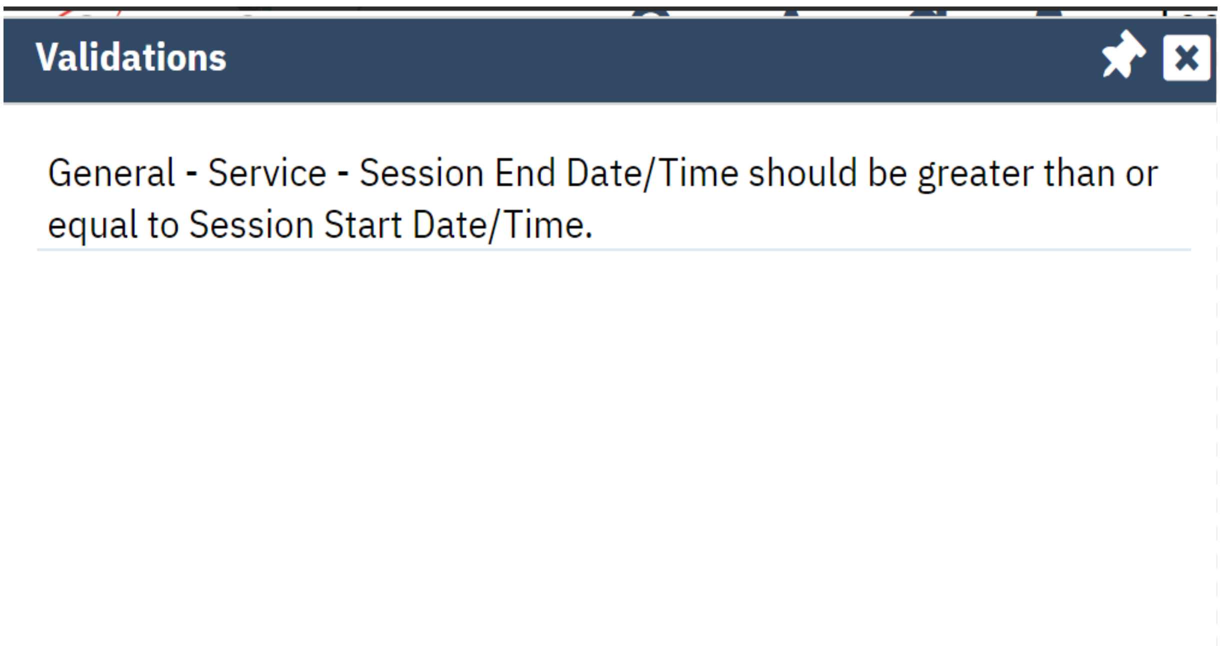
Label: "My signature certifies that I received a service or item on the date listed. I understand that payment for this service or items will be from federal and state funds and that any false claims, statements, or documents, or concealment of material may be prosecuted under applicable federal and state laws."

When the user tries to 'validate' or 'Sign' the document without entering any of the required fields, the below validations will be displayed:

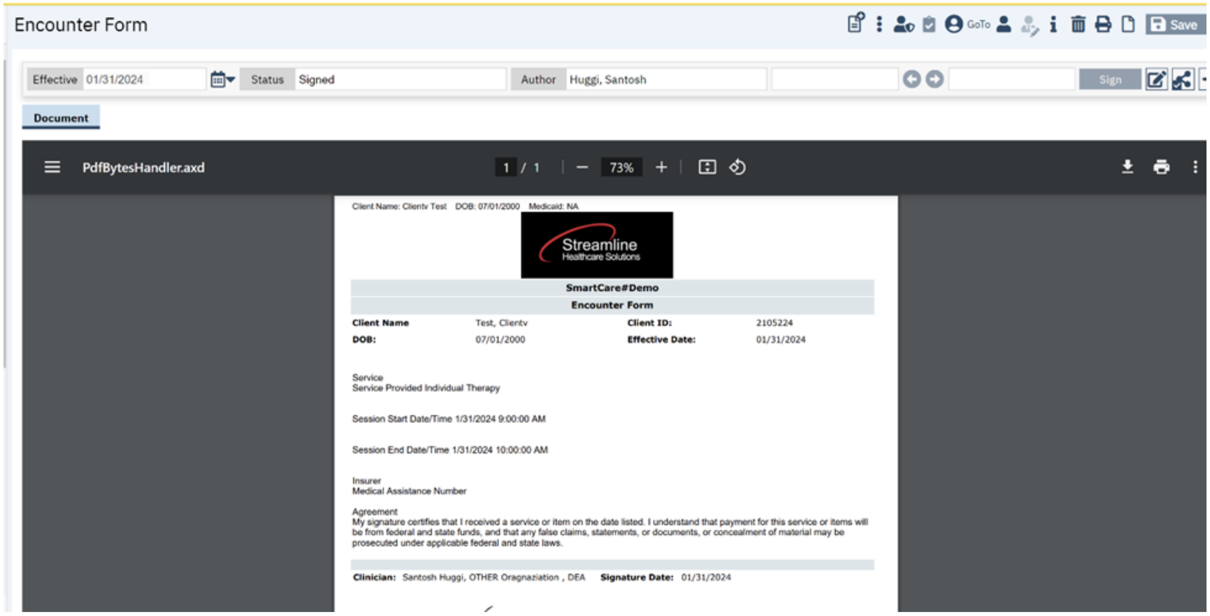
Validations screenshot:



If the Session End Date/Time is lesser than Session Start Date/Time, then the below validation is shown.



Once after entering all the required fields in the document, the user can sign the document, and the PDF will be generated.



Author: Savitha Siddaraju

44. EII #126731: Implemented a new standalone 'C-SSRS Risk Assessment (Lifeline) v3' document and "Risk and Protective Factors" tab is replaced to 'C-SSRS Risk Assessment (Lifeline) v3' tab with functionality.

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:** On Fire

Navigation Path 1: 'Client' - 'Documents' – 'C-SSRS Risk Assessment (Lifeline) v3' document.

Navigation Path 2: 'Client' – 'Documents' – 'C-SSRS Adult Assessment' screen – 'C-SSRS Risk Assessment (Lifeline) v3' tab.

Navigation Path 3: 'Client' – 'Documents'– 'C-SSRS Adult Since Last Visit' screen – 'C-SSRS Risk Assessment (Lifeline) v3' tab.

Navigation Path 4: 'Client' – 'Documents' – 'C-SSRS Children's Baseline Screening' screen – 'C-SSRS Risk Assessment (Lifeline) v3' tab.

Navigation Path 5: 'Client' – 'Documents' – 'C-SSRS Pediatric Since Last Visit' screen – 'C-SSRS Risk Assessment (Lifeline) v3' tab.

Functionality 'Before' and 'After' release:

Purpose: The C-SSRS Risk Assessment is intended to help establish a person's immediate risk of suicide and is used in acute care settings.

With this release, a new standalone 'C-SSRS Risk Assessment (Lifeline) v3' document has been implemented. Also, the "Risk and Protective Factors" tab is replaced with 'C-SSRS Risk Assessment (Lifeline) v3' tab and the required initializations are implemented for the below screens:

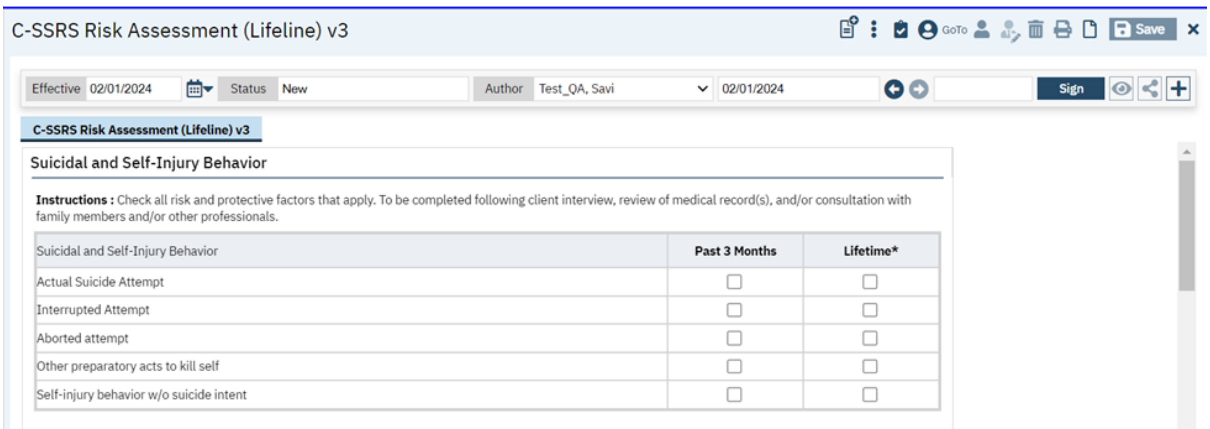
a) Screen Name – C-SSRS Adult Assessment

b) Screen Name – C-SSRS Adult Since Last Visit

c) Screen Name – C-SSRS Children's Baseline Screening

d) Screen Name – C-SSRS Pediatric Since Last Visit.

This Standalone Document has 'C-SSRS Risk Assessment (Lifeline) v3' tab which contains the below sections with respective fields.



Suicidal and Self-Injury Behavior: this section contains the label and grid with respective checkbox option-

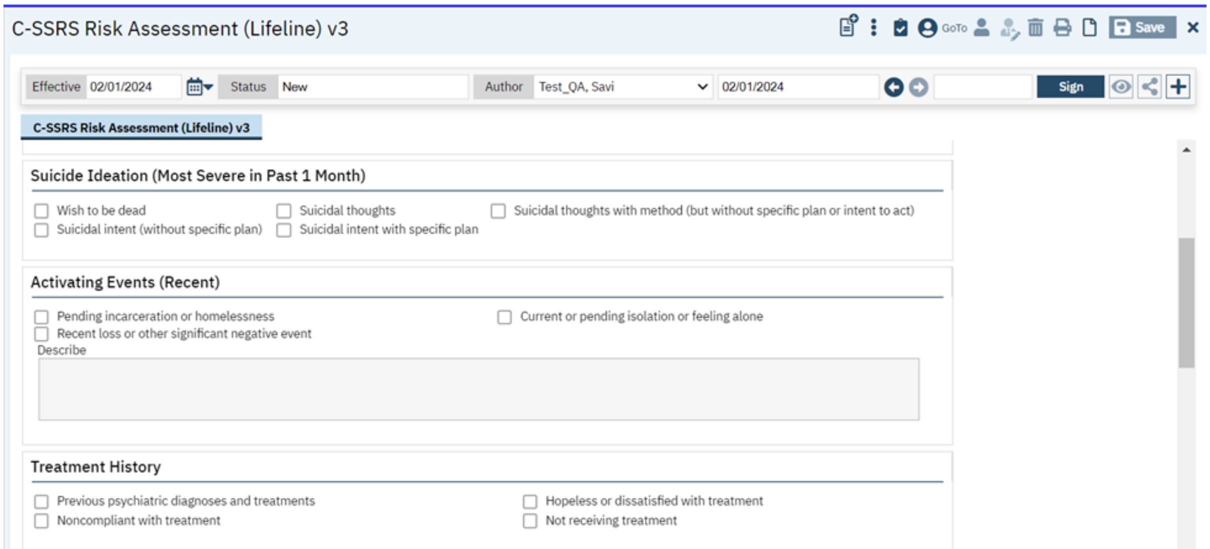
- **Instructions:** Check all risk and protective factors that apply. To be completed following client interview, review of medical record(s), and/or consultation with family members and/or other professionals. – This is a label.

- The grid which contains the below headers listed horizontally:
  - ➢ Suicidal and Self-Injury Behavior
  - ➢ Past 3 Months
  - ➢ Lifetime*

- Suicidal and Self-Injury Behavior column: This will contain list of fields which is associated with respective checkbox:
  - ➢ Actual suicide attempt
  - ➢ Interrupted attempt
  - ➢ Aborted attempt

- ➢ Other preparatory acts to kill self.
- ➢ Self-injury behavior w/o suicide intent

This grid will Initialize the data from the latest signed document.



Suicide Ideation (Most Severe in Past 1 Month) section : This section will contain checkbox response option with enable mode

- Wish to be dead
- Suicidal thoughts
- Suicidal thoughts with method (but without specific plan or intent to act)
- Suicidal intent (without specific plan)
- Suicidal intent with specific plan

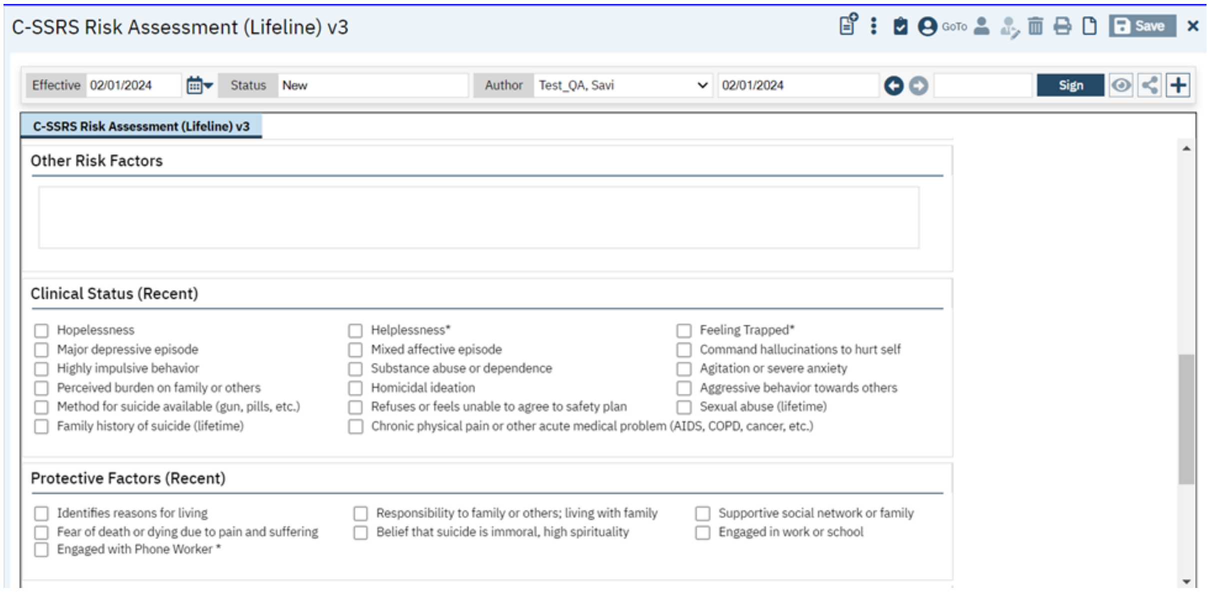
Activating Events (Recent) section: This section will contains the below checkbox response option with enable mode and also text area field.

- Pending incarceration or homelessness
- Current or pending isolation or feeling alone
- Recent loss or other significant negative event

Describe field: This is text area field. This field will be enabled only when the 'Recent loss or other significant negative event' checkbox response option is selected.

Treatment History section: This section will contain checkbox response option with enable mode

- Previous psychiatric diagnoses and treatments
- Hopeless or dissatisfied with treatment
- Noncompliant with treatment
- Not receiving treatment



Other Risk Factors section: This section will contain text area field.

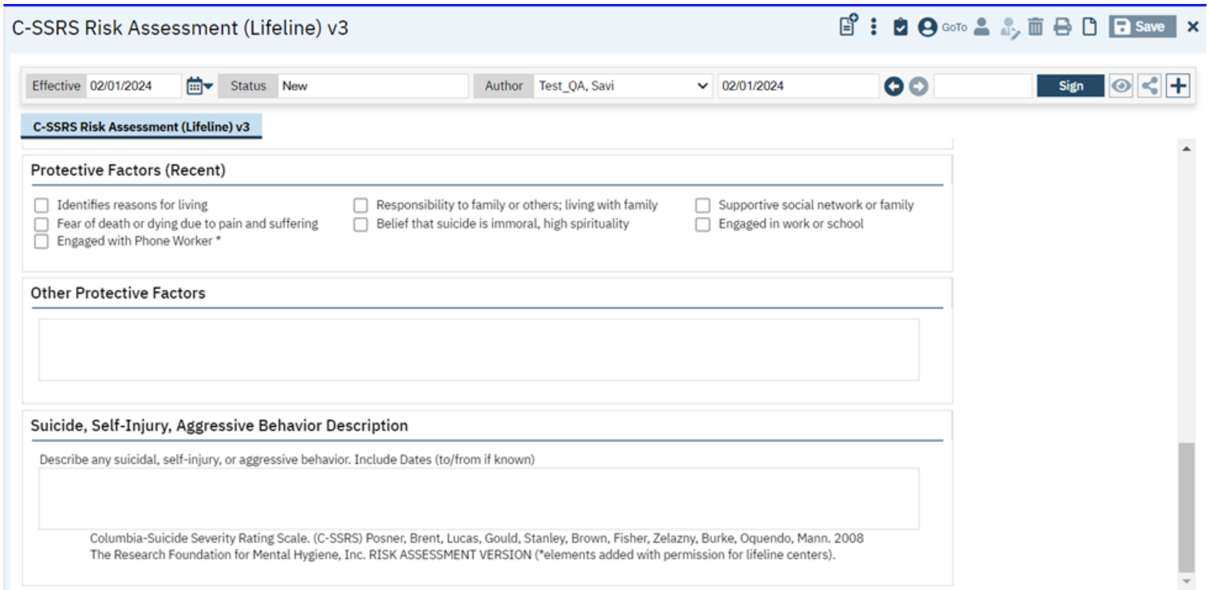
Clinical Status (Recent) section: This section will contain checkbox response option with enable mode:

- Hopelessness
- Helplessness*
- Feeling Trapped*
- Major depressive episode
- Mixed affective episode
- Command hallucinations to hurt self
- Highly impulsive behavior
- Substance abuse or dependence
- Agitation or severe anxiety
- Perceived burden on family or others
- Homicidal ideation
- Aggressive behavior towards others
- Method for suicide available (gun, pills, etc.)
- Refuses or feels unable to agree to safety plan.
- Sexual abuse (lifetime)
- Family history of suicide (lifetime)
- Chronic physical pain or other acute medical problem (AIDS, COPD, cancer, etc.)

Protective Factors (Recent) section: This section will contain checkbox response option with enable mode.

- Identifies reasons for living
- Responsibility to family or others; living with family
- Supportive social network or family
- Fear of death or dying due to pain and suffering
- Belief that suicide is immoral, high spirituality

- Engaged in work or school
- Engaged with Phone Worker *



Other Protective Factors section : This section will contain the text area field.

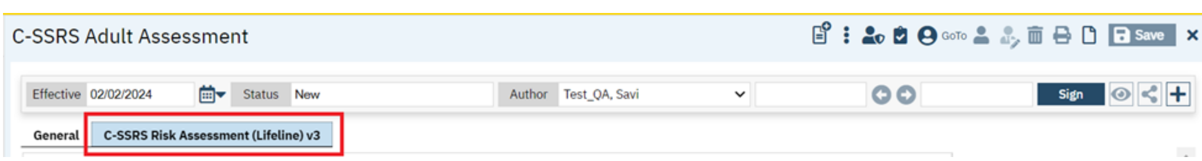
Suicide, Self-Injury, Aggressive Behavior Description section: This section will contain text area field with copyright.

- Describe any suicidal, self-injury, or aggressive behavior. Include Dates (to/from if known)**:** this is Text Area field and also the data will initialize from the latest signed document.
- The below Copyright will be displayed after the text area field.

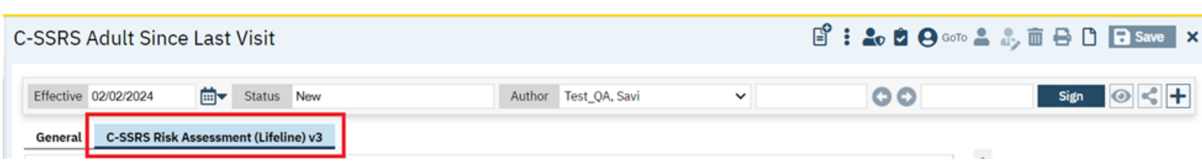
Columbia-Suicide Severity Rating Scale. (C-SSRS) Posner, Brent, Lucas, Gould, Stanley, Brown, Fisher, Zelazny, Burke, Oquendo, Mann. 2008 The Research Foundation for Mental Hygiene, Inc. RISK ASSESSMENT VERSION (*elements added with permission for lifeline centers).

The "Risk and Protective Factors" tab is replaced to 'C-SSRS Risk Assessment (Lifeline) v3' tab as shown below:

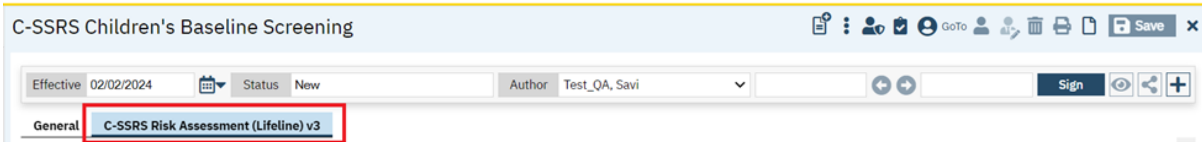
a) C-SSRS Adult Assessment



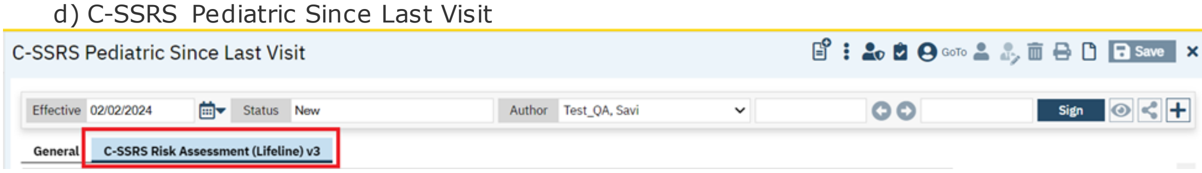
b) C-SSRS Adult Since Last Visit



c) C-SSRS Children's Baseline Screening



d) C-SSRS Pediatric Since Last Visit



Author: Savitha Siddaraju

45. EII #126815: Custom hook has been added to the files to display a custom field tab in the 'Agency/Program Discharge' document.

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

Navigation Path: 'Client' – 'Agency/Program Discharge' screen.

Functionality 'Before' and 'After' release:

Note: This is for specific customers and dependent on state core fix to be released in "SC.NH.6.0_0.01.000.2402.001".

With this release, a custom hook has been added to ssp_SCGetDocumentDischarges.sql, and also changes are done for the code in order to display a custom field tab in the 'Agency/Program Discharge' document.

Author: Akshay Vishwanath

46. Core Bugs # 125855: Multiple issues observed in the Program Assignments.

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

Prerequisites: Enroll and discharge a program to a client between a date ranges through 'Program Assignment Details' screen.

Navigation Path 1: 'Client' – 'Registration' Document – 'Program Enrollment'.

Navigation Path 2: 'Client' – 'Registration Document' – 'Program Enrollment' Tab – 'Request Date' field – select a date in the date range in which the client was already enrolled to the discharged program – 'Primary Program' dropdown – Select the discharged program.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior.

1. When a user signed the Registration Document by selecting Program Status as Requested and Enrolled Date, the system was creating a Client Program entry with the status of Requested along with the Enrolled Date displayed in 'Programs' list page.
2. The 'Registration' document was wrongly allowed to sign the document for re-enrolling the client to an already discharged program, with an enroll request date value in the date range, on which the client was already enrolled to that program.

With this release, the above-mentioned issue has been resolved. Now,

1. When the user selects the Program Status as Requested, the 'Enrolled Date' field will be disabled in the 'Registration' document. So 'enrolled date' will not be displayed in the 'Programs' list page.
2. When the 'Registration' document signed with the discharged program, then the program is not enrolled to the client and also not listed in the client 'Programs' list page.

Author: Sithara Ponnath

47. Core Bugs # 126690: The checkboxes checked in the current medication section are not retained.

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

Navigation Path: **'**Client' --- 'Medication Reconciliation' screen – Click on the 'New' icon – Select the checkboxes or check the 'Select All' checkbox in the 'Current Medication' section --- Navigate to another screen and return to the 'Medication Reconciliation' screen via unsaved changes link.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The checkboxes checked in the current medication section were not retained when the user navigated from the unsaved changes.

With this release, the above-mentioned issue has been fixed. Now, the checkboxes checked in the Current Medications section are retained when the user navigates from the unsaved changes.

Author: Praveen Gangadhara

48. Core Bugs #126702: 'Consent To Treat' PDF document: Custom document PDF format displayed instead of DFA format.

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

Prerequisite: Modify the 'Consent To Treat' Form through the **Path:**

'Administration' – 'Forms' – Search for 'Consent To Treat' – 'DFA Editor' screen – 'DFA Entries' tab – Modify any text in the 'General' section – click on 'Save'.

Navigation Path: 'Client' search – 'Consent To Treat' document – 'Sign' the document.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user made any changes in the 'DFA Editor' screen ('Consent To Treat' form), the changes were not reflected in the 'Consent To Treat' document UI and as well as in PDF.

With this release, the above-mentioned issue has been resolved. Now, the changes made under the 'DFA Editor' screen ('Consent To Treat' form) will be reflected in the 'Consent To Treat' document UI and PDF as well.

~~**Author:** Savitha Siddaraju~~

~~49. Core Bugs # 126769: National Outcome Measures (NOMS) screen: The incorrect tab is enabled and an Invalid validation message is displayed.~~

~~***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:** Fix **|** **Priority:** High~~

~~**Prerequisite:**~~

~~Ensure that, the user is able to select the value for the below fields:~~

~~a. Select the 'Assessment Type' radio button as 'Baseline'.~~

~~b. Select 'Was this interview conducted' as 'No'.~~

~~**Navigation Path:** Client Search – Select a client – Go Search – 'National Outcome Measures (NOMs)' (Client) – click on the 'New' icon – 'National Outcome Measures (NOMs)' Screen – 'Record Management' tab – 'Record Management' section.~~

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

~~Before this release, here was the behavior. When the user validated the 'National Outcome Measures(NOMS)' document, the incorrect "Services Received And Clinical Discharge Status" tab was enabled and the below validation message was displayed.~~

~~**Validation message:** "Services Received And Clinical Discharge Status – Services Received And Clinical Discharge Status – Support Services – Child Care is required"~~

~~With this release, the above-mentioned issue has been resolved. Now, while validating the 'National Outcome Measures(NOMS)' document, the "Services Received And Clinical Discharge Status" tab will not be enabled and also the above validation is not displayed.~~

~~**Author:** Savitha Siddaraju~~

~~50. Core Bugs # 126784: The vitals from the Flowsheet is not showing in the NOMS (National Outcome Measure) document based on the date.~~

~~***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:** Fix **|** **Priority:** High~~

~~**Navigation Path:** Select Client – Go Search – National Outcome Measures (NOMs) (Client) – National Outcome Measures (NOMs) screen - 'Program-Specific Questions' tab – Open Vital Flow Sheet tab – New Entry Flow Sheet Page – enter all the fields – Save - Close – National Outcome Measures (NOMs) document.~~

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

~~Before this release, here was the behavior. The recently entered vitals from the Flowsheet were not initializing to the NOMS (National Outcome Measure) document.~~

~~With this release, the above-mentioned issue has been resolved. Now, the recently entered vitals in the Flowsheet are initializing in the NOMs document.~~

Author: Praveen Gangadhara

51. Core Bugs #126801: 'Family Meal Menu' document PDF: 'Meal Choice' field's value displayed as numbers.

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

Navigation Path: Client – Documents – 'Family Meal Menu' Document – Sign the document.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In 'Family Meal Menu' Document, 'Meal Choice' field's value was being displayed as numbers (Global Code ID) in the PDF document, instead of characters.

I.e: In the PDF it displayed the GlobalCodeId 11136252 instead of the description (Pasta-Alfredo).

With this release, the above-mentioned issue has been resolved. Now in 'Family Meal Menu' Document, 'Meal Choice' field's value will be displayed in characters (Global Code name) and not as numbers in the PDF document.

Author: Savitha Siddaraju

52. Core Bugs # 126870: Documents: All the entered details are not displayed in the 'DLA 20 Youth' document PDF.

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: Fix | **Priority:** Medium

Navigation Path: 'Client' – 'DLA 20 Youth' – 'DLA 20 Youth' screen – Enter all the required details – click on Save and Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user signed the 'DLA 20 Youth' document, all the entered (Activity and Score) details were not displayed in PDF.

With this release, the above-mentioned issue has been resolved. Now, all the details are displayed properly in the PDF of the 'DLA 20 Youth' document.

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

~~53. Core Bugs #126897: PC: Medical Progress Note: The user is unable to navigate back to the 'Medical Progress Note' screen from some other screen.~~

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

~~**Navigation Path:** 'Client' search – Go Search – 'Client Progress Note' – Select any 'In progress' Note - it will Navigate to 'Medical Progress Note' - click on the 'New' icon – select 'Template' – Navigate to 'Client Order' Screen – 'Insert' some Data – Click on 'Save' – Click on Close icon "X" - navigates to the 'Medical Progress Note' – Click on close icon "X" – the user needs to Navigate to 'Client Progress Note' Screen.~~

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

~~Before this release, here was the behavior. When the user navigated from the 'Medical Progress Note' screen to some other screen and tried to navigate back to the 'Medical Progress Note' screen by clicking on the "X" icon, the user was unable to navigate back.~~

~~With this release, the above-mentioned issue has been fixed. Now, the user can navigate back to the 'Medical Progress Note' screen from the other screen, by clicking on the "X" icon.~~

Author: Sunil Belagali

54. Core Bugs #126955: User was able to Sign the Documents without selecting any Program when the respective Document Codes had 'Exclude from CDAG rule' checkbox had null value.

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:** Medium

Prerequisites:

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

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

Navigation Path: Login to SmartCare application – Client – Documents.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was able to Sign the Documents without selecting any Program, when the respective Document Codes 'Exclude from CDAG rule' checkbox had null value.

With this release, the above-mentioned issue has been resolved. The Validation script is modified to prevent the signing of the Document without Program selection, when the Document Codes 'Exclude from CDAG rule' checkbox has null value. Now, the below validation message will display to the user and thus, preventing the signing of the Document when the Program is not chosen.

Validation Message: Program Selection is required.

Author: Savitha Siddaraju

55. Core Bugs #126970: Diagnosis Duplicating in Diagnosis List of Dx Document.

Release Type: Fix **Priority:** Medium

Prerequisite: A signed Diagnosis document exists with ICD code having one or more of the same SNOMEDCTCode with different description.

Navigation Path: Client Search – Select a Client – Go Search – Diagnosis – Create new document – click on 'Refresh Diagnosis' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Diagnosis Document, when the user clicked on 'Refresh Diagnosis' button, the Duplicate Diagnosis was displayed in Diagnosis List grid.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on 'Refresh Diagnosis' button, the Duplicate Diagnosis is not displayed in Diagnosis List grid.

Author: Chaitali Patil

56. Core Bugs #127023: Template(s): The tag names did not appear in the suggestions.

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

Navigation Path 1: Go Search, click on the 'Administration' menu, then click on the 'New' icon, create a new tag, and click on 'Save'.

Navigation Path 2: Go Search, click on 'Template(s) Administration', then click on the 'New' icon, add the template name, create a template with a tag, and verify whether suggestions appear while adding tags.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When a user attempted to create a new template, the tag names did not appear in the suggestions.

With this release, the above-mentioned issue has been fixed. Now, tag names will appear in the suggestions when a user attempts to create a new template.

Flow Sheet

Reference No	Task No	Description
57	Core Bugs # 126770	Adding New Flow Sheet was resulting in glitching and significant slowness.
58	Core Bugs # 126775	Flow Sheet: vital details not displaying in the Graphs tab for processed lab results

Author: Aishwarya Bommaklar

57. Core Bugs # 126770: Adding New Flow Sheet was resulting in glitching and significant slowness.

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

Navigation Path: Client – Flow Sheet – Select Add Flow Sheet from the drop down – Click on New icon – Select Template from Client Templates pop up.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. The data was loading very slow in the Select Template drop down in Client Templates pop up.

With this release, the above-mentioned issue is resolved. Now, the Health Data Templates which are Lab Orders and created by the 'HL7 Lab Interface', are removed to improve the performance. The data is loading faster in select template drop down in Client Templates popup.

Author: Munish Sood

58. Core Bugs # 126775: Flow Sheet: vital details not displaying in the Graphs tab for processed lab results.

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

Navigation Path: Go Search – Flow sheet (Client) – Graphs tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The vital details were not displayed in the Graphs tab of the Flow Sheet screen, for the processed lab results into SmartCare.

With this release, the above mentioned issue has been resolved. Now, the vital details are displaying in the Graphs tab of the Flow Sheet screen, for the processed lab results into SmartCare.

~~Foster Care~~

~~Reference No~~	~~Task No~~	~~Description~~
~~59~~	~~Core Bugs # 126900~~	~~Error is displayed during the execution of the FC discharge support plan validation script.~~

~~**Author:** Lakshmi Kumarappan~~

~~59. Core Bugs # 126900: Error is displayed during the execution of the FC discharge support plan validation script.~~

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

~~**Navigation Path:** NA~~

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

~~Before this release, here was the behavior. There was an issue found during the execution of the FC discharge support plan validation script.~~

~~**File:** InsertScript_ValidationMessages_FCDischargeSupportPlan_1.0.sql~~

~~**Error:**SQL Exception I :Cannot insert the value NULL into column 'DocumentCodeId', table 'R6SmartCareGoldSetup.dbo.DocumentValidations'; column does not allow nulls. INSERT fails.Cannot insert the value NULL into column 'DocumentCodeId', table 'R6SmartCareGoldSetup.dbo.DocumentValidations'; column does not allow nulls. INSERT fails.~~

~~With this release, the above-mentioned issue has been resolved. Now, the script has been modified to change or remove the active condition and there is no issue in screen/frontend and error is not displayed.~~

Group MAR

Reference No	Task No	Description
60	Core Bugs # 126849	Client MAR and Group MAR pages not displayed in full screen.

Author: Madhu Basavaraju

60. Core Bugs # 126849: Client MAR and Group MAR pages not displayed in full screen.

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

Navigation Path 1: Go Search – Group MAR (My Office) – Group MAR screen.

Navigation Path 2: Go Search – Client MAR (Client) – Client MAR screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Group MAR and Client MAR page was not displayed in the full screen.

With this release, the above-mentioned issue has been resolved. The Group MAR and Client MAR page is displayed in full screen.

Group Services

Reference No	Task No	Description
61	EII # 126805	Client Signature to Verify Service(s) Received – Service Note changes, Encounter Form.
62	Core Bugs # 126854	In the Group Services DFA the Goals and Objectives are not saving correctly.
63	Core Bugs # 126881	Group Note: validation message for the Attending field is not displaying when Attending set up was done in the procedure code details page
64	Core Bugs # 126893	Error message is displayed when creating a new Group service.
65	Core Bugs # 126896	The Group Recurring Services end date is not adjusted after changing.
66	Core Bugs # 126915	An Error message is displayed when the user changes the service time and once the nightly job runs.

Author: Niroop Hassan

61. EII # 126805: Client Signature to Verify Service(s) Received – Service Note changes, Encounter Form.

Release Type: New Functionality **|** **Priority:** On Fire

Navigation Path 1: 'Administration' – 'Procedure/Rates' – 'Procedure/Rates' list page – Click on Procedure name hyperlink – 'Procedure Code Details' page – 'Rules' section – 'Require Client Signature on the Encounter Form' checkbox option.

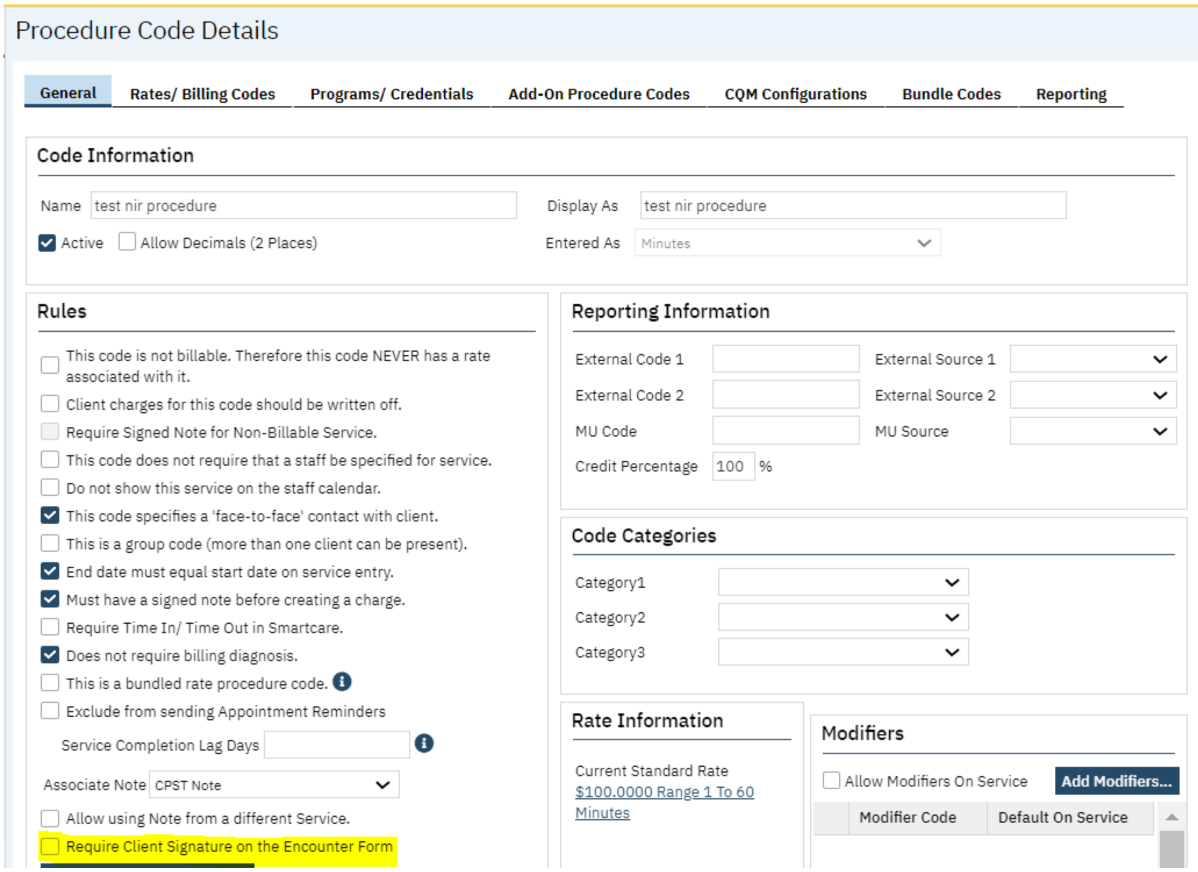
Navigation Path 2: 'Client' – 'Services/Notes' – 'Services/Notes' list page – Click on 'New' icon – Select the required Program, Procedure and Location where the Service Note document code have 'Show Encounter Form' selected as Yes.

Navigation Path 3: 'My Office' -- 'Groups' – 'Groups' list page – Click on 'New' icon – 'Group Details' page – Enter required data and select required Group Note, Program, Procedure and Location where the Service Note document code have 'Show Encounter Form' selected as Yes – Click on 'Schedule' tab – Click on 'New Group Services' button – 'Group Service Client' popup – Enter and select required data and click on 'Select' button – 'Group Service Detail' page.

Functionality 'Before' and 'After' Release:

The following changes are implemented in Procedure Code Details page:

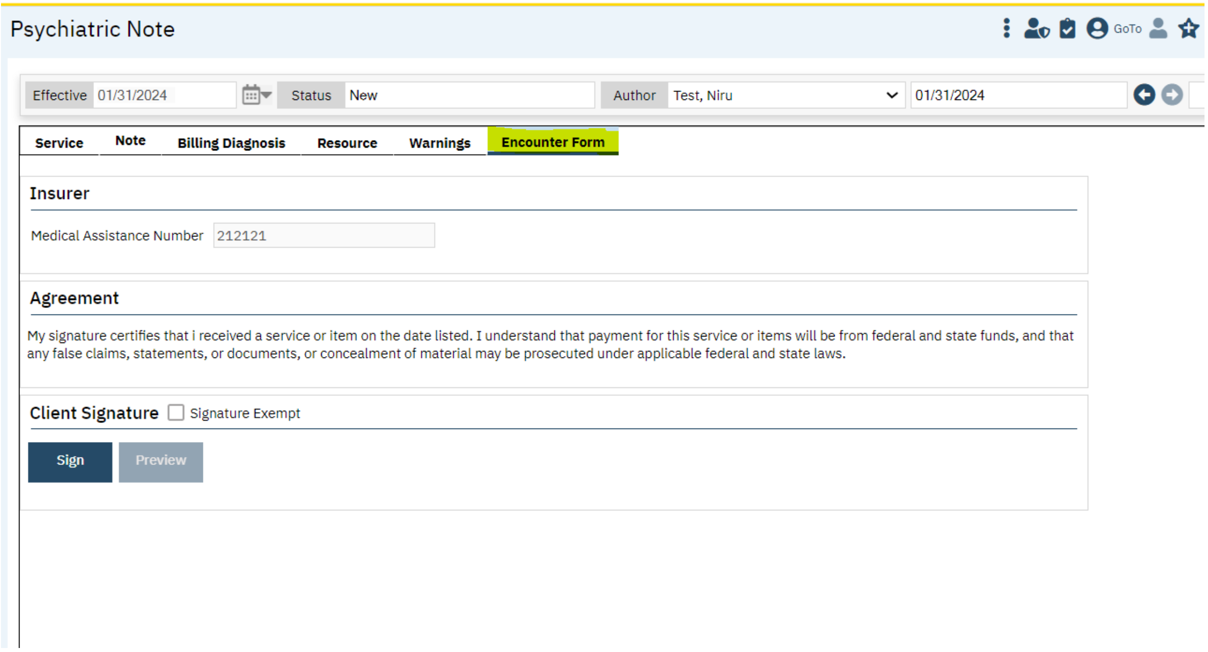
'Require Client Signature on the Encounter Form' checkbox is added in the 'Rules' section.



Note: If the "Require Client Signature on Encounter Form" is selected in Procedure Code Details screen, then if the user tries to sign the document without signature or without selecting 'Signature Exempt', then the validation message is shown. This is the same for Service Note and Group Service Detail screen also.

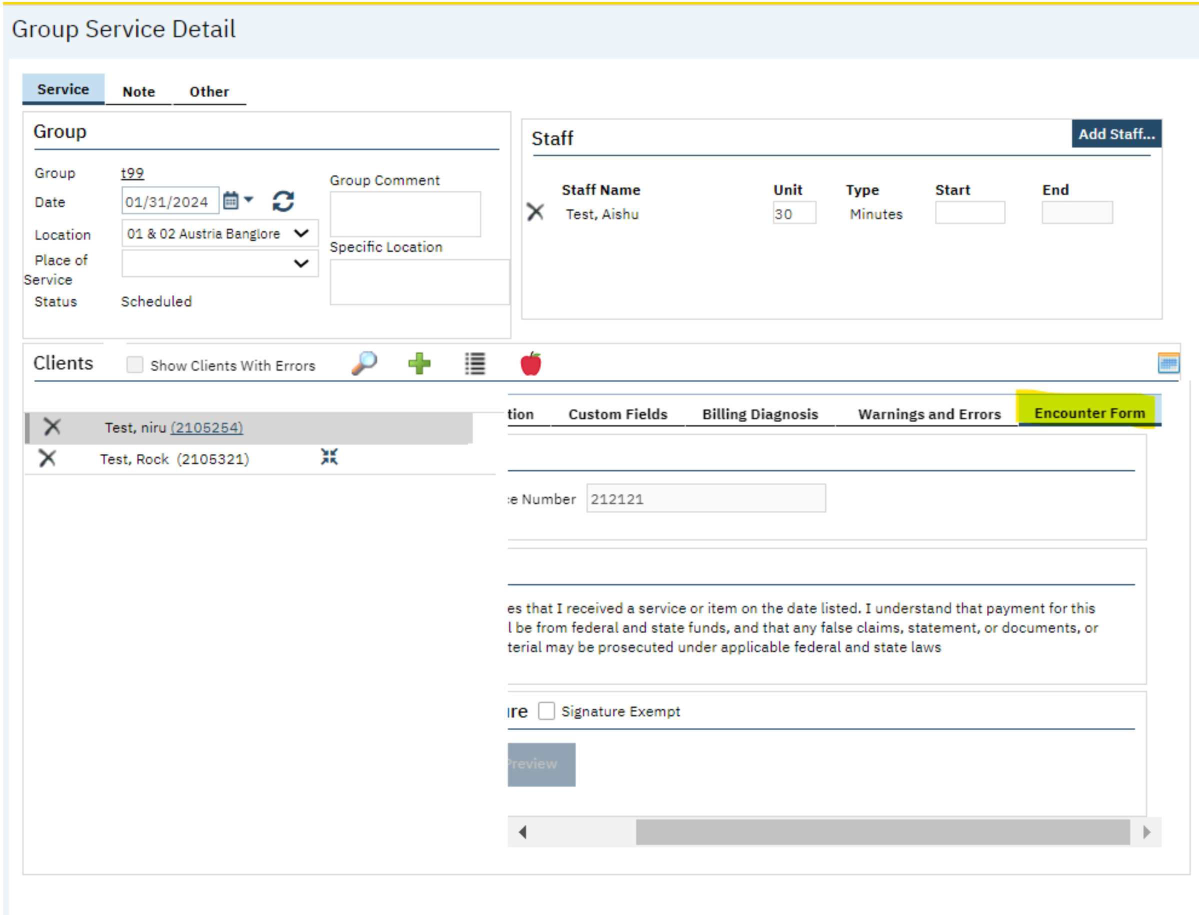
Service Note: 'Encounter Form' tab is implemented with below sections:

- Insurer: Consists of 'Medical Assistance Number' textbox.
- Agreement: Label (My signature certifies that I received a service or item on the date listed. I understand that payment for this service or items will be from federal and state funds, and that any false claims, statements, or documents, or concealment of material may be prosecuted under applicable federal and state laws.)
- Client Signature: 'Signature Exempt' checkbox.
- 'Sign' button and 'Preview' button.



Group Service Detail: 'Encounter Form' tab is implemented with the below sections:

- Insurer: Consists of 'Medical Assistance Number' textbox.
- Agreement: Label (My signature certifies that I received a service or item on the date listed. I understand that payment for this service or items will be from federal and state funds, and that any false claims, statements, or documents, or concealment of material may be prosecuted under applicable federal and state laws.)
- Client Signature: 'Signature Exempt' checkbox
- 'Sign' button and 'Preview' button.



Author: Chaithra Kunjilana

62. Core Bugs # 126854: In the Group Services DFA the Goals and Objectives are not saving correctly.

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

Navigation Path: 'My Office' – Go to 'Groups'– Create a new 'Group' of type 'Misc G/O Note' – Navigate to Schedule tab – Click on 'New Group Service' – Choose a date, clients and click on 'Select' button – 'Group Service Details' page – Enter the Required values – 'Note' tab – 'Client Note' sub-tab – check the 'Goals and Objective' checkbox – navigate to any other screen – navigate back to Group Services – click on 'Save'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to save the 'Misc G/O group note' by navigating from unsaved changes, the data was not saved properly in the 'care plan addressed by this service' section, when multiple Goals and objectives existed.

With this release, the above-mentioned issue has been fixed. Now, when the user navigates from unsaved changes and then clicks on the 'Save' button in the 'Misc G/O Group note', data is saved properly in the 'Care Plan Addressed by This service' section, even when multiple 'Goals and Objectives' are existing.

Author: Aishwarya Bommaklar

63. Core Bugs # 126881: Group Note: validation message for the Attending field is not displaying when Attending set up was done in the procedure code details page.

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

Prerequisite:

Attending is selected from Staff Type drop down under 'Staff Required During Services' section through the **path**:

Administration – Procedure/Rates list page – Click on the Procedure Name hyperlink – Select Attending from Staff Type drop down under 'Staff Required During Services' section – Click on Insert – Click on Save icon.

Navigation Path: 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 – Click on Save icon –Click on Note tab – Enter the details – Click on Update My Client Notes button – Click on Client Notes tab – Enter the required details – Click on Sign My Notes button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to Sign the Group Note, validation message for the Attending field was not displayed even though the Attending set up was done in the procedure code details page.

With this release, the above-mentioned issue is resolved. Now, the below mentioned validation message will be displayed for the Attending field on signing the Group Service Note.

Validation Message: "Attending is required."

Author: Suganya Sivakumar

64. Core Bugs # 126893: Error message is displayed when creating a new Group service.

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

Navigation Path: My Office-Groups-Select any Group (Hyperlink)- Group Details-click on Schedule- Click on New Group Service- Select the details in the Group Service Client Popup.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to create a new Group service in the Group details screen, the below error message was displayed.

Error Message: Object reference not set to an instance of an object.

With this release, the above-mentioned issue is resolved. Now, the user can create a new group service in the Group details screen without any error.

Author: Suganya Sivakumar

65. Core Bugs # 126896: The Group Recurring Services end date is not adjusted after changing.

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

Prerequisite:

1. The Group Services is created with the Recurring group services.
2. Then delete the Original Group Service.
3. Then select the first Recurring Group Service and adjust the date.

Navigation Path 1: My office --- Groups --- Groups List page --- Click on New Icon --- Group Detail page --- Enter all the required fields --- Click on Save button --- Navigate to Schedule tab --- Click on New Group Service button --- Group Service Clients popup --- Select Date of Service and Clients --- Click on Select button.

Navigation Path 2: Navigate to Group Service Detail Screen --- Enter all the required fields --- Click on Save Button --- Click on Make Recurring Icon --- Recurring Group Services Pop up --- Enter the required field --- Click on the OK button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Group Service Details' screen, when the user tried to change the end date of a group recurring service, the date didn't change.

With this release, the above-mentioned issue has been resolved. Now, when the user changes the end date of a group recurring service in the 'Group Service Details' screen, the date changes accordingly.

Author: Niroop Hassan

66. Core Bugs # 126915: An Error message is displayed when the user changes the service time and once the nightly job runs.

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

Navigation Path: 'My Office' – 'Groups' – 'Groups' list page – Click on 'New' icon – 'Group Details' page – Click on 'Schedule' tab – Click on 'New Group Services' button – 'Group Service Client' popup – Enter and select required data and click on 'Select' button – 'Group Service Detail' page – Change the Service Time and click on 'Save' icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When the user changed the service time and the nightly job ran after that, the below error message was displayed.

Error Message: "Duration Does not match DateTimeIn/DateTimeOut"

With this release, the above-mentioned issue has been resolved. Now, the error message is not displayed, when the user changes the service time and a nightly job runs.

Inquiry Details

Reference No	Task No	Description
67	Core Bugs # 126817	Inquiry Details: Error log in the 'Error log Viewer' screen when click on 'Save' button in 'Inquiry Details' screen.
68	Core Bugs # 126845	Inquiry Details: Disposition Section: Inactive Work Group was displaying.
69	Core Bugs # 126866	Inquiry Details – Tabbing through the Client Information (Potential) Section was from left to right.

Author: Savitha Siddaraju

67. Core Bugs # 126817: Inquiry Details: Error log in the 'Error log Viewer' screen when click on 'Save' button in 'Inquiry Details' screen.

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

Navigation Path 1: Client Search – Enter client details and perform 3-way search – click on 'Inquiry (new client)' button – 'Inquiry Details' screen – Enter required details – click on Save.

Navigation Path 2: 'Administration' – 'Error Log Viewer' – 'ErrorLogViewer' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked on 'Save' button in the 'Inquiry Details' screen, the below mentioned exception was logged in 'ErrorLogViewer' screen.

Error Message: "Input string was not in a correct format."

With this release, the above-mentioned issue has been resolved. Now, the exception is not logged in to the 'ErrorLogViewer' screen when the user clicks on the 'Save' button in the 'Inquiry Details' screen.

Author: Ramya Nagaraj

68. Core Bugs # 126845: Inquiry Details: Disposition Section: Inactive Work Group was displaying.

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

Navigation Path: Login to SmartCare – Client Search - Inquiry Details Screen – Disposition Section – Assigned Work Group.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Inactive work group' was displayed in the 'Assigned Work Group' drop down field in 'Disposition' section of the 'Inquiry Details' screen.

With this release, the above-mentioned issue has been resolved. Inactive Work Group is not displaying in the Assigned Work Group drop down field in 'Disposition' section of the 'Inquiry Details' screen.

Author: Kiran Tigarimath

69. Core Bugs # 126866: Inquiry Details – Tabbing through the Client Information (Potential) Section was from left to right.

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

Navigation Path: 'Client Search' – 'Search for client' – 'Inquiry (New Client)' – Inquiry Details' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The tabbing through the Client Information (Potential) Section was from left to right side in 'Inquiry Details' screen.

With this release, the above-mentioned issue has been resolved. Now, the tabbing will go down left side first after 'email to complete the full address' and then to the right to complete the Urgency Level under 'Client Information (Potential)' section in 'Inquiry Details' screen.

Interface

Reference No	Task No	Description
70	EII # 124735	API Provider Directory.
71	Core Bugs # 126601	Client Orders: Order Status not updated as Result Obtained when received the Lab Result.
72	Core Bugs # 126648	Error is displaying when sending the message to Quest lab.
73	Core Bugs # 126674	The 'LOINC code' details for 'Lab orders' are not inserting in the 'HealthDataTemplates' table, when the 'Compendium' is processed through 'SQL job'.
74	Core Bugs # 126861	Continuity of Care Document/Record Details: Comma is displayed in front of Author Name.

75	Core Bugs # 126942	Courtesy Copy information is not pulling correctly and displaying deleted Courtesy Copy information in eRequistion and HL7 Message
76	Core Bugs # 126957	Lab Results: 'Performing Lab information' is not displaying under Lab Results tab in the 'Client Order' screen.
77	Core Bugs # 127036	Performing Lab Information was not displaying Lab Result tab under client order details screen when the user received the Lab Results

Author: Jagadeesh Raju

70. EII # 124735: API Provider Directory.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

With this release, a logic has been implemented to generate the FHIR file in the XML format and send all the active providers' data with organizations and locations to API Provider Directory in FHIR server through SQL Job.

Author: Munish Sood

71. Core Bugs #126601: Client Orders: Order Status not updated as Result Obtained when received the Lab Result.

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

Navigation Path: Go search- -Client Orders (Client).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user received the Lab Results, the Order Status was not updated to Result Obtained. Instead, it showed the Date Received for the orders.

With this release, the above-mentioned issue is resolved. Now, when the user receives the Lab Results, the Order Status is updated to Result Obtained and the same is displayed in the Client Orders screen.

Author: Munish Sood

72. Core Bugs #126648: Error is displaying when sending the message to Quest lab.

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

Navigation Path: NA

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the HL7 message, under the IN1 segment, when the address was in 2 lines, the IN1 segment was displayed in 2 lines. Due to this, there was an error displayed when sending the message to Quest lab.

errordescription='1040: Incomplete request data: Order Code'

With this release, the above-mentioned issue is resolved. The code is added to prevent the Address having the space issue. The IN1 segment will not display messages in two lines and an error is not displaying when sending the message to Quest lab, now.

Author: Munish Sood

73. Core Bugs #126674: The 'LOINC code' details for 'Lab orders' are not inserting in the 'HealthDataTemplates' table, when the 'Compendium' is processed through 'SQL job'.

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

Navigation Path 1: 'Client' search – 'Client Orders' – click on 'New Order' – 'Save and Sign'.
Navigation Path 2: 'Administration' – 'Health Data Templates' – 'Health Data Templates' list page – 'Health Data Templates' Detail page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'LOINC code' details for 'Lab orders' were not inserting in the 'HealthDataTemplates' table, when the 'Compendium' was processed through 'SQL job'. The below error message was displayed for the missing 'LOINC code' when the user signed the 'Client Order'.

Error Message: "Selected lab does not have Loin code setup. Please contact administrator"

With this release, the above-mentioned issue has been fixed. Now, the SQL Job to process the Compendium is inserting the 'LOINC' code for the 'Lab orders' in the 'HealthDataTemplates' table. Also, no error message is displayed for the missing 'LOINC code', when the user signs the 'Client Order'.

Author: Munish Sood

74. Core Bugs #126861: Continuity of Care Document/Record Details: Comma is displayed in front of Author Name.

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

Navigation Path: Go Search – Continuity of Care Document/Record (My Office) - Continuity of Care Document/Record Screen – Enter the data in all fields – Apply Filter – click on Date hyperlink – Continuity of Care Document/Record Details.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Continuity of Care Document/Record Details Screen, comma was displayed in front of Author Name in the Author field.

With this release, the above-mentioned issue has been resolved. Now the Comma is not displaying in front of Author Name for the Author field in the Continuity of Care Document/Record Details Screen.

Author: Munish Sood

75. Core Bugs #126942: Courtesy Copy information is not pulling correctly and displaying deleted Courtesy Copy information in eRequistion and HL7 Message.

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

Navigation Path 1: Client Search – Select a Client – Client Information (C) – Interfaces tab – Labcorp Requisition Courtesy Copy section.

Navigation Path 2: 'Administration' – 'Messages Interface (Administration)- 'Messages Interface' list page – 'Message Interface Detail' Detail page – click on the Id hyperlink.

Navigation Path 3: Client – Client Orders – Client Order Details – New – Save and Sign – Attachments – eRequisition.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. As part of HL7 Lab Interface with labcorp, the Courtesy Copy information was not initializing correctly and displayed deleted Courtesy Copy information in eRequisition and HL7 Message from Client Information screen under Interface tab. And, allowed the users to select more than one Courtesy Copy details from the Client Information screen under Interfaces tab, with no validation when the user signed the Client Order.

With this release, the above the issue has been fixed. Now, the correct Courtesy Copy information is initializing from the Client Information screen under Interface tab, into eRequisition and HL7 Message. Also, the below validation message will be displayed in the client order screen, when the user is trying to sign the Client Order if the user select more than one Courtesy Copy information from Client Information screen under Interface tab.

Validation Message: 'Labcorp can have only one CourtesyCopy information under Interface tab on the Client Information screen'

Author: Munish Sood

76. Core Bugs #126957: Lab Results: 'Performing Lab information' is not displaying under Lab Results tab in the 'Client Order' screen.

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

Navigation Path: 'Client' search – 'Client Orders' – 'Client Orders' List Page – 'Client Orders Details' page – 'Lab Results' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Performing Lab information' was not displayed under the 'Lab Results' tab in the 'Client Order' screen, when the user received the 'Lab Results' with 'Performing Lab Information' from Lab.

With this release, the above-mentioned issue has been fixed. Now, the 'Performing Lab information' is displayed under the 'Lab Results' tab in the 'Client Order' screen, when the user receives the 'Lab Results' with 'Performing Lab Information' from Lab.

Author: Jagadeesh Raju

77. Core Bugs #127036: Performing Lab Information was not displaying Lab Result tab under client order details screen when the user received the Lab Results.

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

Navigation Path: 'Client' – 'Client Orders' –Client Order' list page – Client Orders details page – Lab Result.

Functionality 'Before' and 'After' release:

Note: This task is a Database object change to the Core Bugs **# 126957** task.

Before this release, here was the behavior. In the Client Order screen, the Performing Lab Information was not displayed under the Lab Result tab, when the user received the Lab Results with Performing Lab Information from Lab.

With this release, the above-mentioned issue has been resolved. Now, the Performing Lab Information is displayed under the Lab Result tab on the Client Order screen, when the user receives the Lab Results with Performing Lab Information from Lab.

List Page Framework

Reference No	Task No	Description
78	Core Bugs # 126789	The horizontal Scroll Bar is not displaying on DFA List pages after Apply Filter.

Author: Sunil Belagali

78. Core Bugs #126789: The horizontal Scroll Bar is not displaying on DFA List pages after Apply Filter.

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

Navigation Path: Login to SmartCare Application – Navigate to any 'DFA List page' that has a horizontal scroll bar – Click on the 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the DFA List Page, when the user clicked on the 'Apply Filter' button, the horizontal scroll bar was disappeared.

With this release, the above-mentioned issue has been fixed. Now, the Horizontal scroll bar will not disappear from the DFA list page when the user clicks on the 'Apply Filter' button.

Manage Claims

Reference No	Task No	Description
79	Core Bugs # 126906	Auto Pay Claims failed – (intermittent issue) Claim manual approval created duplicate entries in ClaimLineCoveragePlans.

Author: Renuka Gunasekaran

79. Core Bugs #126906: Auto Pay Claims failed – (intermittent issue) Claim manual approval created duplicate entries in ClaimLineCoveragePlans.

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

Navigation Path: Select 'Client' – 'My Office' – 'Claim Lines' – Select 'Entry Complete' Claim line – 'Claim Line Details screen' – 'Select Action' – 'Approve' – 'Claim Line Approve' Popup – Select 'Reason for Manual Approval' – Enter value in 'Total Amount Approved' and 'Units Approved' – Select 'Plan' and Enter value in 'Amount To Pay' – Insert and then Approve.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Auto Pay Claims job was not working as the system created duplicate records in 'ClaimLineCoveragePlans' table, when manually approving the claim line.

With this release, the above mentioned issue has been resolved. Before completing the claim line approval process, the duplicate records are deleted from the 'ClaimLineCoveragePlans' table. Hence, Auto Pay Claims job is working as expected.

Manage Letter Template

Reference No	Task No	Description
80	EII # 125778	Implementation of PCP Letter template.
81	Core Bugs # 126762	The font size and font style set in the Letter Template screen was not copied to the PDF.
82	Core Bugs # 126816	Activation of the 'Allowed to add/modify/delete codes' checkbox in the 'LETTERTEMPLATE' Global Code Category.

Author: Chaithra Kunjilana

80. EII #125778: Implementation of PCP Letter template.

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

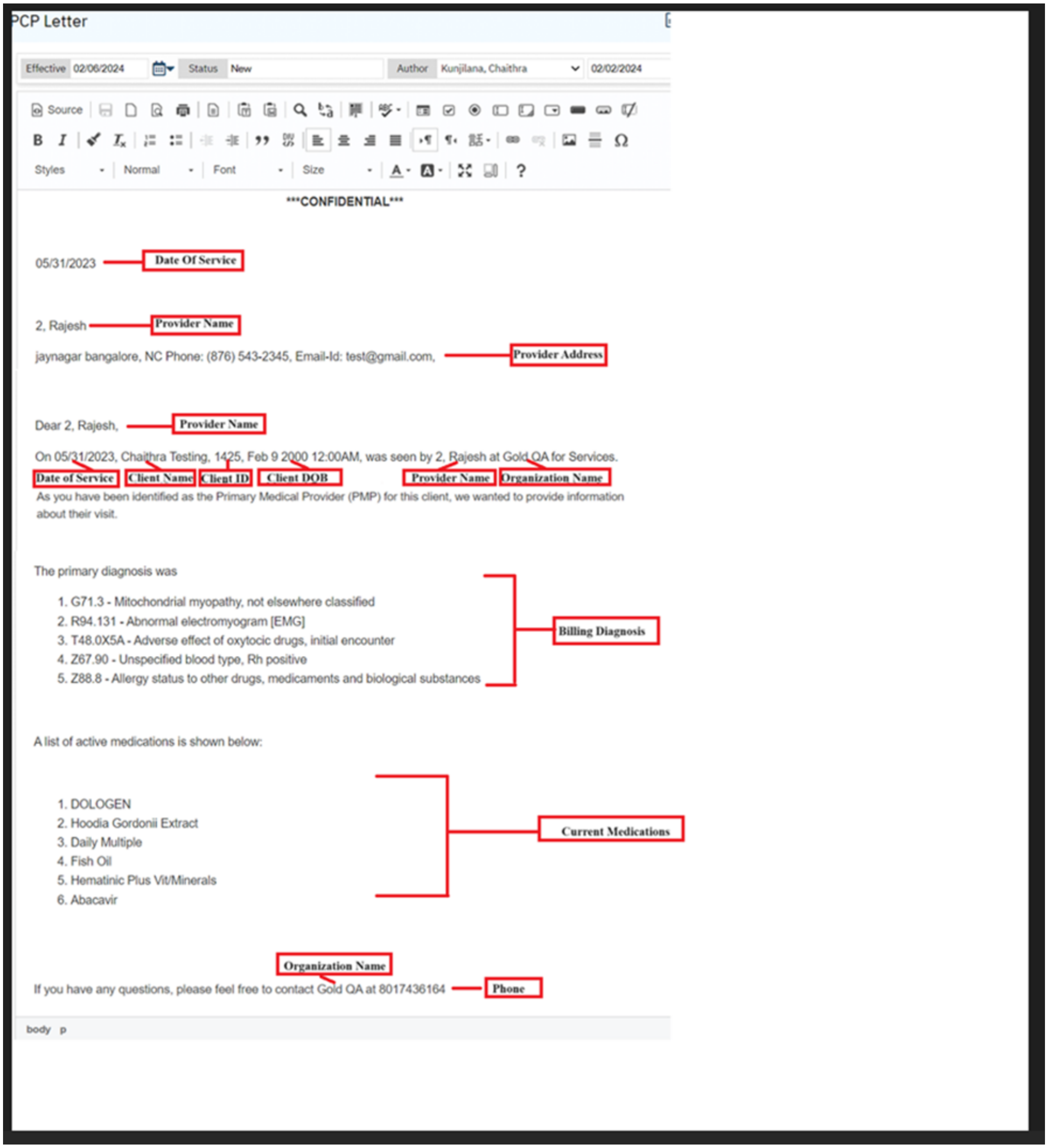
Navigation Path: Client Search - Select a client – Go Search – PCP Letter – Enter the Details – Sign.

Functionality 'Before' and 'After' release:

Purpose: The PCP letter captures the Date of Service that was completed previously for the client by the provider, the Primary Diagnosis that was used and the Medications that was prescribed.

With this release, a new Letter Template named PCP Letter is implemented with below mentioned label values:

Screenshot for PCP Letter:



- **Date Of Service**

  o Displays the date when the provider given the service to the client last. (Displays the data of completed service)

- **Provider Name**

  o Displays the Primary Care Provider information from Client -- Client Information (C) -- Primary Care Referral Tab -- Provider Name.

  o If none exist in Client Information (C), then displays from the most recently signed Registration Document.

Registration Document (C) -- Demographics -- Primary Care Physician.

- **Provider Address - Street details**

  o Displays the Street details from Client -- Client Information (C) -- Primary Care Referral tab -- Referral Information section -- Provider Information (address, phone number, fax number, etc.) Text box.

- **Provider Address - City, State, Zip code details**

  o Displays the details from Client -- Client Information (C) -- Primary Care Referral tab -- Referral Information section -- Provider Information (address, phone number, fax number, etc.) Text box.

- **Client Name, Client Id, Date Of Birth of the client, Provider Name**

  o Displays the data from the Client Information (C).

- **Organization name**

b) Displays from SystemConfigurations Table -- OrganizationName column.

Billing Diagnosis

- Displays the billing diagnosis from the service**.**

Current Medications

- Displays the Current Medications (Ordered Medications) from Rx.

- If you have any questions, please feel free to contact <Organization Name> at <Phone>.

c) The SmartCare displays the Organization Name from SystemConfigurations.OrganizationName and Phone from Agency.MainPhone field respectively.

Screenshot for PCP Letter PDF:

Streamline Healthcare Solutions, L.L.C.

PCP Letter

Client Information

Client Name	Testing, Chaithra	**Client ID**	1425
DOB	02/09/2000	**Effective Date**	02/02/2024

*****CONFIDENTIAL*****

05/31/2023

2, Rajesh

jaynagar bangalore, NC Phone: (876) 543-2345, Email-Id: test@gmail.com,

Dear 2, Rajesh,

On 05/31/2023, Chaithra Testing, 1425, Feb 9 2000 12:00AM, was seen by 2, Rajesh at Gold QA for Services.

As you have been identified as the Primary Medical Provider (PMP) for this client, we wanted to provide information about their visit.

The primary diagnosis was

1. G71.3 - Mitochondrial myopathy, not elsewhere classified
2. R94.131 - Abnormal electromyogram [EMG]
3. T48.0X5A - Adverse effect of oxytocic drugs, initial encounter
4. Z67.90 - Unspecified blood type, Rh positive
5. Z88.8 - Allergy status to other drugs, medicaments and biological substances

A list of active medications is shown below:

1. DOLOGEN
2. Hoodia Gordonii Extract
3. Daily Multiple
4. Fish Oil
5. Hematinic Plus Vit/Minerals
6. Abacavir

If you have any questions, please feel free to contact Gold QA at 8017436164

Clinician:	Chaithra Kunjilana, OTHER Oragnaziation professional Tester	**Signature Date:**	02/02/2024 8:19PM

This document was electronically signed by Chaithra Kunjilana, OTHER Oragnaziation professional Tester on 02/02/2024 8:19PM

Author: Chaithra kunjilana

81. Core Bugs #126762: The font size and font style set in the Letter Template screen was not copied to the PDF.

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

Navigation Path: Client – 'Letter Template'(Administration)- Test Balance Letter – Enter the required values – Change the Font Style and Font Size -Sign.

Functionality 'Before' and 'After' release:

Note: This is a customer Specific issue fix.

Before this release, here was the behavior. When a user signed any letter template, the font size and font style set in the Letter Template screen, was not reflected in the PDF.

With this release, the above-mentioned issue has been resolved. Now, the font size and font style set in Letter Template Screen is reflected in the PDF when the user signs any letter template.

____

Author: Kiran yogendra

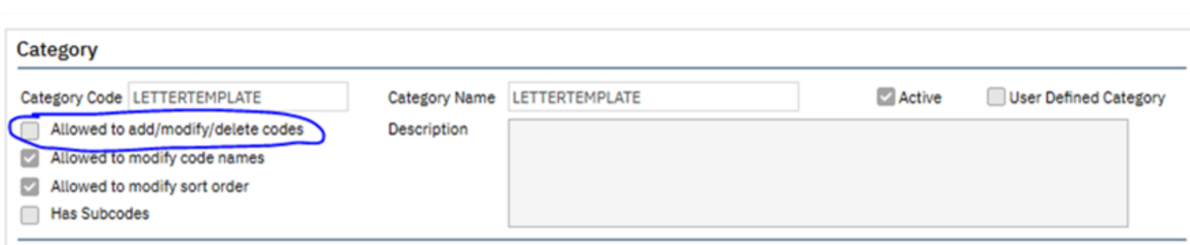
82. Core Bugs #126816: Activation of the 'Allowed to add/modify/delete codes' checkbox in the 'LETTERTEMPLATE' Global Code Category.

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

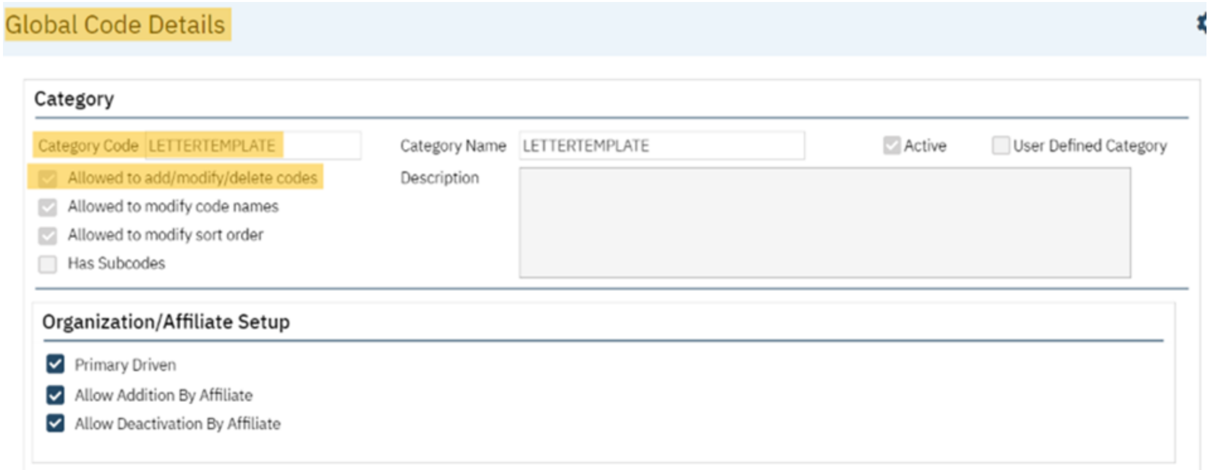
Navigation Path: Administration -- 'Global Codes' - Select 'LETTERTEMPLATE' category under 'All Categories' dropdown - Click on 'LETTERTEMPLATE' Category - Global Code Details - Check if the 'Allowed to add/modify/delete codes' checkbox is checked and disabled.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Allowed to add/modify/delete codes' checkbox in the 'LETTERTEMPLATE' Global Code Category was unchecked and disabled by default.



With this release, the above-mentioned issue has been resolved. Now, the Global Code Category 'LETTERTEMPLATE' is unlocked, and the 'Allowed to add/modify/delete codes' checkbox for this category is checked and disabled.



Medical Progress Note

Reference No	Task No	Description
83	Core Bugs # 126857	Services are not being created on the Medical progress Note sign.
84	Core Bugs # 126886	Getting an error when tried to 'Save/Sign' the 'Medical Progress Note'.

Author: Sithara Ponnath

83. Core Bugs #126857: Services are not being created on the Medical progress Note sign.

Release Type: Fix **Priority:** Medium

Navigation Path 1: Client- Go search- Medical Progress Note (Client) - Click on 'New' icon - Select a template 'SOAP-2021' - Enter all the required details - Click on 'Save/Sign' button.

Navigation Path 2: Client- Go Search-Services (Client).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The EM pop-up was not displayed when the user clicked on the 'Sign' button in the Medical Progress Note. Hence the service was not created after signing the Medical Progress Note.

With this release, the above-mentioned issue has been resolved. Now, the EM Pop-up is displayed when clicked on the sign button in the Medical progress note and the services are created after signing the Medical Progress Note.

Author: Sithara Ponnath

84. Core Bugs #126886: Getting an error when tried to 'Save/Sign' the 'Medical Progress Note'.

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

Navigation Path: 'Client' -- 'Medical Progress Note' – Select a 'Template' from the pop-up and click on 'Ok' button – Enter required data --- Click on 'Save/Sign' button.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. When the user tried to 'Save/Sign' the 'Medical Progress Note', the below red error was displayed.

Error Message: 'Error occurred during dataset merge process at server side, please contact system administrator for the further assistance.

With this release, the above-mentioned issue has been resolved. Now, the code is optimized to avoid the error from occurring. The user can 'Save/Sign' the 'Medical Progress Note' without any error now.

Messages

Reference No	Task No	Description
85	Core Bugs # 126931	Message Detail' screen: Clients associated to other staffs are displayed.

Author: Ramya Nagaraj

85. Core Bugs #126931: Message Detail' screen: Clients associated to other staffs are displayed.

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

Prerequisite: Logged in staff user is associated with the provider though the **Path:** Administration -- 'Staff details' -- 'Staff details' screen -- 'Care Management' tab.

Navigation Path: 'My Office' -- 'Message Detail' -- 'Message Detail' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Message Detail' screen, when a staff user attempted to search for clients in the 'Client' searchable dropdown field, the provider clients associated with other staff were displayed for logged in staff.

With this release, the above-mentioned issue has been resolved. Now, the logged in staff cannot see the provider clients of other staff in the 'Message Detail' screen.

My Caseload

Reference No	Task No	Description
86	Core Bugs # 126747	My Caseload: Inactive Staff caseload is displayed when 'Organizational Hierarchy' is selected.
87	Core Bugs #126781	My Caseload list Page Shows Incorrect "Last Seen by Me" Date.
88	Core Bugs #126824	My Caseload screen resizing when using the filters.
89	Core Bugs #126891	Time out error is displayed on My Caseload screen.

Author: Niroop Hassan

86. Core Bugs #126747: My Caseload: Inactive Staff caseload is displayed when 'Organizational Hierarchy' is selected.

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

Navigation Path: 'My Office' – 'My Caseload' - 'My Caseload' list page – Select required filter options – Click on 'Organizational Hierarchy…' button – Select the required 'Organizational Hierarchy' and click on 'Save' button – Click on 'Apply Filter' button.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When the user selected 'Organizational Hierarchy' and clicked on 'Apply Filter' button, the list of data which was displayed in 'My Caseload' list page was having the caseload of Inactive Staff as well.

With this release, the above-mentioned issue has been resolved. Now, only Active staff Caseload is displayed when the user filters using 'Organizational Hierarchy'.

Author: Niroop Hassan

87. Core Bugs #126781: My Caseload list Page Shows Incorrect "Last Seen by Me" Date.

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

Prerequisite: Service is present for a client with 'Show' status.

Navigation Path: 'My Office' – 'My Caseload' - 'My Caseload' list page – 'Last Seen by Me' column.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the 'My Caseload' list page, the 'Last Seen by Me' column was showing an incorrect date.

With this release, the above-mentioned issue has been resolved. Now, the 'Last Seen by Me' column in the 'My Caseload' list page is showing the correct 'Last Seen by Me' date.

Author: Aishwarya Bommaklar

88. Core Bugs #126824: My Caseload screen resizing when using filters.

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

Navigation Path: Go Search – My Caseload (My Office) - My Caseload screen – select filter options – Apply Filter.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the My Caseload, when the user applied filter, the screen was reloading and getting resized without utilizing the full screen.

With this release, the above-mentioned issue is resolved. Now, in the My Caseload screen, when the user applies the filter, the screen is not resizing and is utilizing the full screen to display all the columns.

Author: Niroop Hassan

89. Core Bugs #126891: Time out error is displayed on My Caseload screen.

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

Navigation Path: My Office – 'My Caseload' - 'My Caseload' list page – Select the required filter options and click on the 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The time out error message was displayed on the My Caseload screen, when the user clicked on the 'Apply Filter' button.

With this release, the above-mentioned issue is resolved. Now, when the user clicks on the Apply filter button, the time out error message is not displayed and the records corresponding to the filtered options are displayed on the My Caseload screen.

Orders

Reference No	Task No	Description
90	EII # 125876	Implementation to add a new Order Type option 'Nutrition' and its other functionalities are implemented in the 'Order Details' screen.
91	EII # 126696	Implemented Medication line format in Client Order PDF and Client MAR.
92	Core Bugs # 126932	Issues in Orders list page and Pending Lab Specimen Collection widget

Author: Sithara Ponnath

90. EII # 125876: Implementation to add a new Order Type option 'Nutrition' and its other functionalities are implemented in the 'Order Details' screen.

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

Navigation Path 1: 'Administration' – 'Orders' screen – Click on 'New' icon – Select the 'Nutrition' option from the 'Order Type' drop-down under the 'Order Setup' section --- Select a value from the 'Type' searchable textbox --- Enter other required data --- Click on 'Save' button to create an order of 'Nutrition' type.

Navigation Path 2: 'Client' --- 'Client Orders' screen --- Click on 'New' icon --- Type and search an order of 'Nutrition' type and enter required data – Click on 'Insert' button --- Click on 'Save/Sign' button.

Functionality 'Before' and 'After' release:

With this release, the below changes have been implemented in the 'Orders Details' screen:

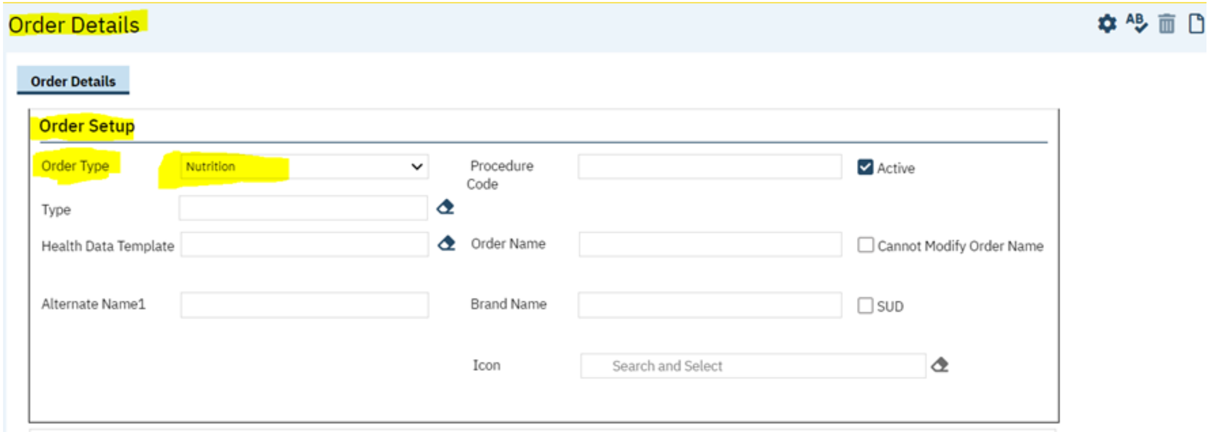
A new order type 'Nutrition' is added in the 'Order Details' screen.

When 'Nutrition' type is selected in the 'Order Type' drop-down, the 'Order Setup' section will display the same fields as of 'Activity' Order Type.

Global Code Category:

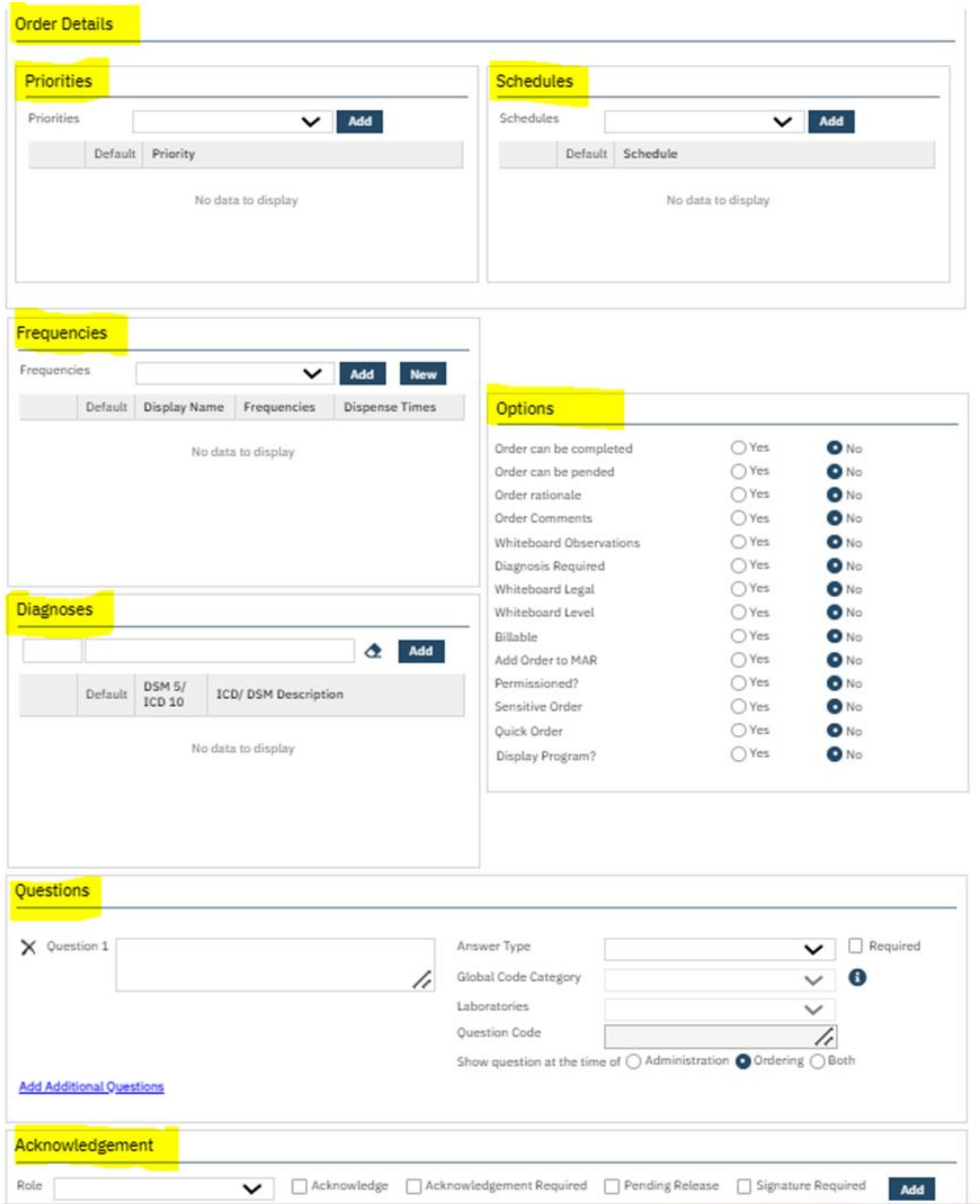
- Added a new option 'Nutrition' in the existing global code category 'OrderType'.
- The Sub Global Code Category of Order Type will have the below values added for the field 'Type' and this global code will be editable so that the user can add values to it.
    - Diet
    - Meal Level
    - Replacement Protocol

Please see the **Order Setup section in the 'Order Details' screen** as below.



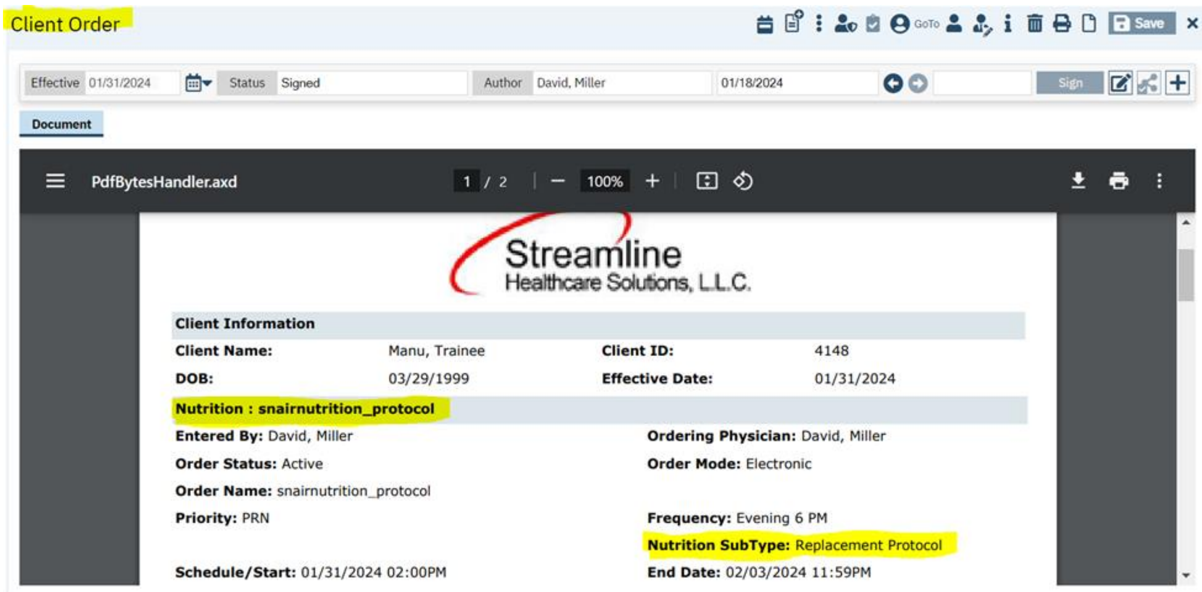
- The rest of screen will display all the sections (Priorities, Schedules, Frequencies, Options etc as shown in the below screenshot) and the fields those get displayed for 'Additional' Order Type. All the other functionalities will remain as they were earlier.

The Order Details section in the 'Order Details' screen is as shown below.



- The 'Medication Category' and 'Prescription Required' fields is removed from the 'Options' section under the 'Order Details' tab.

When a client order of 'Nutrition' type order is created and signed, a field 'Nutrition Sub Type' will be displayed on the signed Client Order PDF document.



Author: Varsha Patil

91. EII # 126696: Implemented Medication line format in Client Order PDF and Client MAR.

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

Navigation Path1: 'My Office' – 'My Reports' – 'Client Order'.

Navigation Path2: 'My Office' – 'My Reports' – 'Client MAR'.

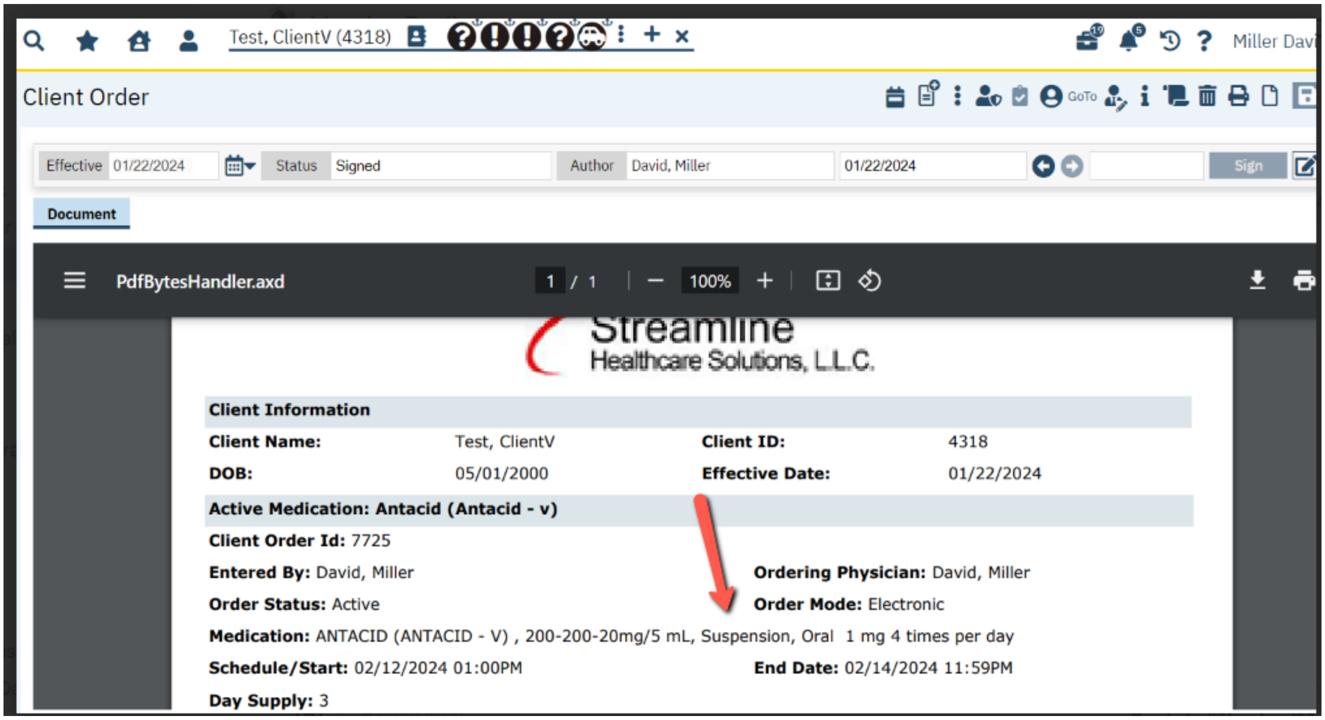
Functionality 'Before' and 'After' release:

Purpose: The Client Order – Medication line does not include the full medication strength and formulation and omits important information such as the tablet needing to be an extended-release formulary. These are included in this change.

With this release, the formatting of the Medication is updated to include full medication Strength and Formulation in Client Orders PDF and in Client MAR.

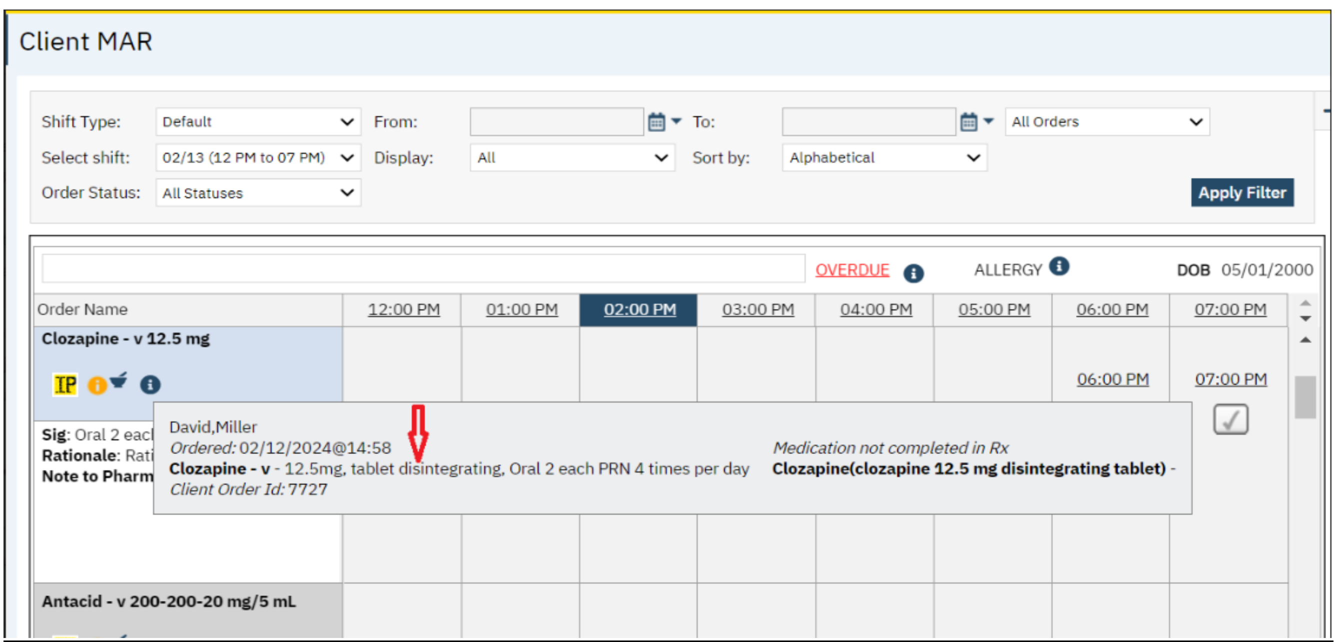
Screenshot for Client Order PDF:

The Medication line will now read the following: Medication Name (Order Name), Strength, Formulation, Route, Dose, Unit, Frequency. The Formulation of the strength will now display as Tablet, Powder, Capsule, etc instead of an abbreviation.



Screenshot for Client MAR

The Medication line will now read the following: Medication Name (Order Name), Strength, Formulation, Route, Dose, Unit, Frequency. The Formulation of the strength will now display as Tablet, Powder, Capsule, etc instead of an abbreviation.



Author: Shivakanth Moger

92. Core Bugs # 126932: Issues in Orders list page and Pending Lab Specimen Collection widget.

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

Navigation Path 1: Go search – 'Orders (My Office)' – 'Orders' list page.

Navigation Path 2: Go search – 'Dashboard (My Office)' – Dashboard – 'Pending Lab Specimen Collection' widget – click on 'All' hyperlink text – 'Orders' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below mentioned issues were observed in the 'Orders (My Office)' list page and 'Pending Lab Specimen Collection' widget:

Issues in 'Orders (My Office)' list page:

Issue 1: The screen was not loading, and a time-out error occurred during the page load.

Issue 2: The 'Start date' and 'End date' filters took one week while loading. Hence slowness was observed while loading the page.

Issue 3: When the user filtered the 'Collection Date', the correct data was not displayed.

Issues in 'Pending Lab Specimen Collection Widget'

Issue 1: The 'Pending Lab Specimen Collection Widget' displayed the wrong count compared to the 'Orders' list page.

With this release, the above-mentioned issue has been resolved. Now, in the 'Orders (My Office)' list page and 'Pending Lab Specimen Collection' widget, the above-mentioned issues are resolved.

'Orders (My Office)' list page:

Issue 1: The screen is loading properly without any error.

Issue 2: The 'Start date' and 'End date' filters are taking two days from the current date while loading. Thus, slowness of the list page is resolved.

Issue 3: When the user filters the 'Collection Date', the correct data is displayed.

'Pending Lab Specimen Collection Widget'

Issue 1: The 'Pending Lab Specimen Collection Widget' is displaying correct count with respect to 'Orders' list page.

Orders/Rounding

Reference No	Task No	Description
93	Core Bugs # 126799	User unable to Acknowledge multiple orders at a time.

Author: Chaitali Patil

93. Core Bugs # 126799: User unable to acknowledge multiple orders at a time.

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

Prerequisite: The Multiple signed client orders exists.

Navigation Path 1: Go Search - 'Orders/Rounding' (My office) – select multiple orders – click on Acknowledge Orders (s) Icon - verify selected orders are acknowledge at a time or not.

Navigation Path 2: Perform client search - Go Search – 'Orders/Rounding' (Client) – select Multiple orders – click on Acknowledge Orders (s) Icon - verify the selected orders are acknowledge at a time or not.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to acknowledge multiple orders at a time, the below mentioned error was displayed:

Error Message: You are not authorized for this action

With this release, the above-mentioned issue has been resolved. Now, the users can Acknowledge multiple orders at a time in 'Orders/Rounding' (My office) screen and also, in 'Orders/Rounding' (Client) screen.

Payments/Adjustments

Reference No	Task No	Description
94	Core Bugs # 126859	The total payment amount in the downloaded 'Excel sheet' did not match the applied amount in the 'Payment/Adjustment Posting' pop-up screen.

Author: Sahana Gururaja

94. Core Bugs # 126859: The total payment amount in the downloaded 'Excel sheet' did not match the applied amount in the 'Payment/Adjustment Posting' pop-up screen.

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

Navigation Path: 'My Office' – 'Payments/Adjustments' – click on the required 'Date Received' hyperlink -- 'Payment/Adjustment Posting' pop-up – in the 'Activity' tab – click on 'Save As' button – open the downloaded excel sheet.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user exported the payment into 'Excel', the total payment amount in the downloaded 'Excel sheet' did not match the applied amount in the 'Payment/Adjustment Posting' pop-up screen.

With this release, the above-mentioned issue has been fixed. The logic is modified to include the 'AR Transaction' if the Charge record is deleted. Now, the total payment amount in the downloaded Excel sheet matches the total applied amount in the 'Payment/Adjustment Posting' pop-up screen.

~~Primary Care~~

Reference No	Task No	Description
~~95~~	~~EII # 125780~~	~~A new 'Medication' radio button is added in the 'Health Maintenance Template' screen.~~
~~96~~	~~Core Bugs # 126863~~	~~The screen set in the client Page Preference is not displayed on click of Client ID in Primary Care Appointments pop-up.~~
~~97~~	~~Core Bugs # 126867~~	~~Medical Progress Note: The System Tags have weird behavior where text color changes to the wrong color.~~
~~98~~	~~Core Bugs # 126880~~	~~PC: Not all problems showing in the Problems widget on Client Summary Primary Care.~~

~~**Author:** Shivkanth Moger~~

~~95. EII # 125780: A new 'Medication' radio button is added in the 'Health Maintenance Template' screen.~~

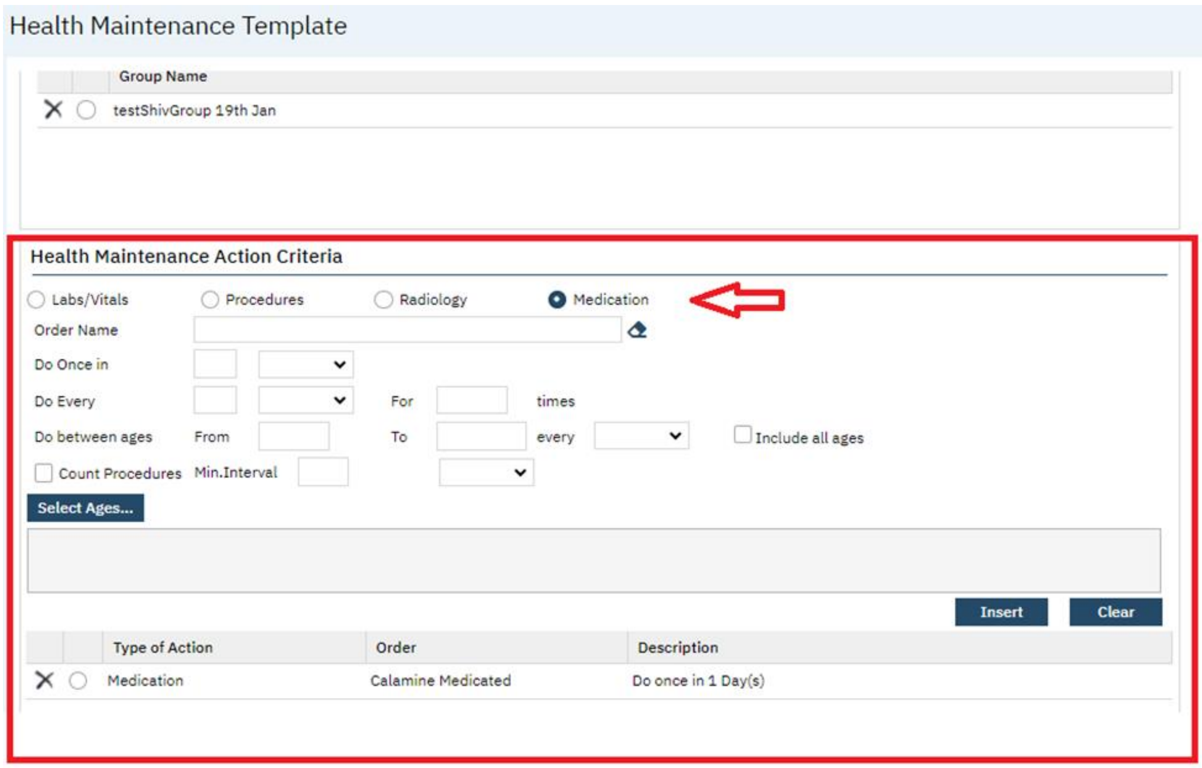
~~**Release Type:** Change | **Priority:** High~~

~~**Navigation Path:** Go Search- 'Health Maintenance List (Administration)' – 'Health Maintenance Template List' List page – New – 'Health Maintenance Template' screen – 'Health Maintenance Action Criteria' section- Select the 'Medication' radio button.~~

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

~~**Purpose:** The Customer will use this to track client Immunization Schedule.~~

~~With this release, the 'Medication' radio button is added in the Health Maintenance Action Criteria section under the 'Health Maintenance Template' screen. When the 'Medication' radio button is selected, the users are able to search and create/add medication orders in the Order Name field.~~



~~**Author:** Abhishek Naik~~

~~96. Core Bugs # 126863: The screen set in the client Page Preference is not displayed on click of Client ID in Primary Care Appointments pop-up.~~

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

~~**Prerequisites:** The screen name is set in the Client Page Preference.~~

~~**Navigation Path:** 'My Calendar (My Office)' – Create 'New Primary Care Entry' – Click on 'Client ID' hyperlink.~~

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

~~Before the release, here was the behavior. The Client ID hyperlink in the Primary Care Appointment pop-up was getting redirected to 'Client Summary', instead of the screen name set in the Client Page Preference.~~

~~With this release, the above-mentioned issue has been resolved. Now, Client ID hyperlink in the Primary Care Appointment pop-up will be redirected to the screen name set in the Client Page Preference.~~

~~**Author:** Abhishek Naik~~

97. Core Bugs # 126867: Medical Progress Note: The System Tags have weird behavior where text color changes to the wrong color.

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

Navigation Path: Client' – Create 'Medical Progress Note' with document tag template.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Medical Progress Note, when the template with the document tag was selected, then the text color was changed from black to orange and the PDF text was also displayed in the orange color.

With this release, the above-mentioned issue is resolved. Now, when the template with the document tag is selected, then the text color is not changing and displays the text in black color in the PDF and also in the Medical progress note.

Author: Shivakanth Moger

98. Core Bugs # 126880: PC: Not all problems showing in the Problems widget on Client Summary Primary Care.

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

Prerequisite: Add some problems in 'Problem Details' screen by following the **path**: Go search – 'Problem Detail' – 'Problem Detail' screen – add some problems and save the screen.

Navigation Path: Go search – 'Client Summary (Primary Care) (Client)' – 'Client Summary (Primary Care)' screen – 'Problems' widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Client Summary (Primary Care)' screen, under the 'Problems' widget, all the problems added in the 'Problem Detail' screen, were not displayed.

With this release, the above-mentioned issue has been resolved. Now, In the 'Client Summary (Primary Care)' screen, under the 'Problems' widget, all the problems added in the 'Problem Detail' screen are displayed.

Primary Care Progress Note

Reference No	Task No	Description
99	Core Bugs # 126910	The Prenatal Care tag details were not displayed correctly in the Medical Progress Note.

Author: Lakshmi Kumarappan

~~99. Core Bugs # 126910: The Prenatal Care tag details were not displayed correctly in the Medical Progress Note.~~

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

~~**Prerequisites:**~~

~~**1.** Create a new flag by following the **path:** Go search -Tags (Administration) - Click on New -Select the 'open flow sheet pop up' value in the Tag behavior drop down.~~

~~**2**. Modify the vitals by following the **path:** Go Search-Enter Vitals -Enter the required details- click on save.~~

~~**Navigation Path:** Client- Medical Progress Note.~~

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

~~Before this release, here was the behavior. In the Medication Progress note, the Prenatal Care tag details were displayed from the most recent Vital Flow sheet, instead of the 'Flow sheet Details Pop up'.~~

~~With this release, the above-mentioned issue has been resolved. Now, the Prenatal Care tag details are displayed correctly from the 'Flow sheet detail Pop up' in the Medical Progress Note.~~

Programs

Reference No	Task No	Description
100	Core Bugs # 126820	Getting an error when staff attempt to open a program for an inactive client.

Author: Kiran Tigarimath

100. Core Bugs # 126820: Getting an error when staff attempt to open a program for an inactive client.

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

Navigation Path: 'Client' -- 'Programs' -- click on 'New' Button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to open 'Program Assignment Details' screen for an inactive client, the below-mentioned red error message was displayed.

Error Message: The value for column 'DocumentCodeId' in table 'Screens' is DBNull.

With this release, the above-mentioned issue has been resolved. Now, when the user tries to open the 'Program Assignment Details' screen for an inactive client, the following red message will be displayed.

Message: 'You cannot perform new operation for inactive client'

Provider Contract

Reference No	Task No	Description
101	Core Bugs # 126989	No value is displayed in the '% Cap used' field under the 'Contract Details' tab of the 'Contract Details' screen.
102	Core Bugs # 126997	Copy Contracts action copied the associated clients from one Provider contract to another provider contract.

Author: Renuka Gunasekaran

101. Core Bugs # 126989: No value is displayed in the '% Cap used' field under the 'Contract Details' tab of the 'Contract Details' screen.

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

Prerequisites:

1. Create a provider contract by following the **path:** 'My Office' – 'Provider Contract' – Select 'Provider Contract' – 'Provider' – 'Provider Contract' – Enter a value in the 'The total dollar value of this contract may not exceed' field – 'Save'.
2. Create a claim line by following this **path**: Select a 'Client' – 'Claims (My office)' – 'Claim Type' – 'Claim Entry' screen – 'Claim Line Details' screen – 'Select Action' – 'Adjudicate and Pay.'

Navigation path: 'My Office' – 'Provider Contract' – Select 'Provider Contract' – 'Provider' – 'Provider Contract' – 'Contract Details' screen – 'Contract Details' tab – '% Cap used' field.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. No value was displayed in the '% Cap used' field, based on the values displayed in the 'The total dollar value of this contract may not exceed' (Refer Prerequisite 1) and 'Current claims approved and paid' (Refer Prerequisite 2) fields under the 'Contract Details' tab of the 'Contract Details' screen.

With this release, the above-mentioned issue has been fixed. Now, the value is displayed in the '% Cap used' field under the 'Contract Details' tab of the 'Contract Details' screen.

Author: Renuka Gunasekaran

102. Core Bugs # 126997: Copy Contracts action copied the associated clients from one Provider contract to another provider contract.

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

Navigation Path 1: 'My Office'-'Provider Contract' - Select 'Provider Contract' -'Provider Contract(provider)' - 'Contract Details' -'Contracted rates' -Add billing code and select 'Add client' to map clients for the billing code - Insert and Save - Select 'Copy contract' - Check all option and select different Provider from 'Provider' drop down - select 'Insurer' and Start and End date and click on 'Ok'.

Navigation Path 2: 'My Office'-'Provider Contract' - Select 'Provider Contract' which created using 'copy Contract' option - 'Provider Contract (Provider)' - 'contract details' - 'Contract rates' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Copy contract action copied the associated clients from one provider contract to another provider contract.
With this release, the above-mentioned issue is resolved. Now, the associated clients are removed when performing the copy contract action.

Reception

Reference No	Task No	Description
103	Core Bugs # 126419	Reception screen: Unable to type any amount in the Copay Amt field.

Author: Namratha Nagaraj

103. Core Bugs # 126419: Reception screen: Unable to type any amount in the Copay Amt field.

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

Navigation Path: 'My Office' -- 'Reception/Front Desk' -- Click on 'Balance' hyperlink -- 'Client payment' pop up – 'Amount Applied to Services For Today' section -- Enter amount in the 'Copay Amt' Field.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was unable to type an amount in the 'Copay Amt 'field of 'Client payment' popup.

With this release, the above-mentioned issue has been Resolved. Now, the user can type an amount in the 'Copay Amt' field.

Rx Application

Reference No	Task No	Description
104	EII # 125366	RX: Consent Real-Time Med History functionality with appointments
105	EII # 126681	Rx: Implementation to add new tooltip for External order entries
106	Core Bugs # 126136	Client MAR: "Monday Through Friday" Medication Showing on Weekends as Well
107	Core Bugs # 126268	Issues occurred in the 'Patient Summary' page when the user navigating to the 'Patient Summary' page.
108	Core Bugs # 126724	Rx: Warning message displayed while running Rx app in Visual Studio
109	Core Bugs # 126772	Improvement to min and max dose calculations
110	Core Bugs # 126837	Medication records were not saving in database properly for existing non ordered medication.
111	Core Bugs # 126908	ssp_ValidateLoginToken does not check if the TwoFactorDevice record is marked as record deleted

Author: Rajgopal Yajurvedi

104. EII # 125366: RX: Consent Real-Time Med History functionality with appointments.

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

Navigation Path 1: 'My Office'– My Calendar– click on 'Click to Create New Primary Care Entry' button – 'New Primary Care Entry' popup – Select the required fields – Select the Status as 'Scheduled/Checked In/Exam Room' – Click 'OK' button.

Navigation Path 2: Client– 'Medication Management Rx' – Rx Application – 'Patient Summary' screen – Eligibility tab – Eligibility Information Processes are displayed.

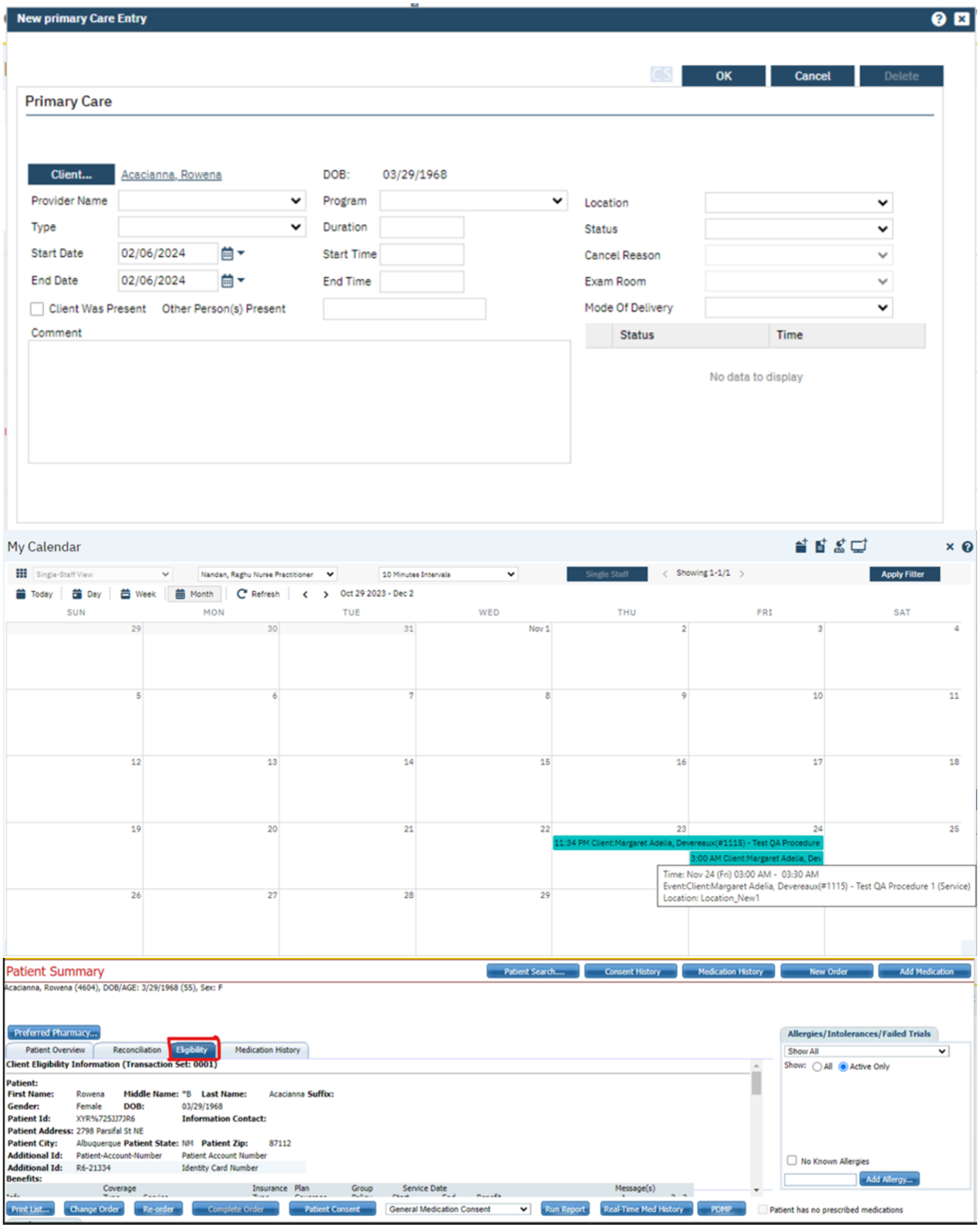
Navigation Path 3: 'Client' –- 'Medication History Request Consents' link – 'Medication History Request Consents' screen – Sign the consent.

Navigation Path 4: Client - 'Medication Management Rx' – Rx Application – 'Patient Summary' screen – 'Medication History' tab – Click 'Real-Time Med History' button - Medication History information Processed.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Rx Application, the Eligibility was processed when the user scheduled the Service (only) in the SmartCare.

With this release, when the user schedules the appointment with Status 'Scheduled/Checked In/Exam Room' from 'New Primary Care Entry', the Eligibility information will also be processed (based on the appointment schedules), along with the Scheduled Services eligibility process (which is an existing scenario).



Author: Manjunath Malipatil

105. EII # 126681: Rx: Implementation to add new tooltip for External order entries.

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

Prerequisite: The External orders in the Pharmacy Orders screen are processed. After this, an entry will be created in the Patient Summary screen (Rx Application).

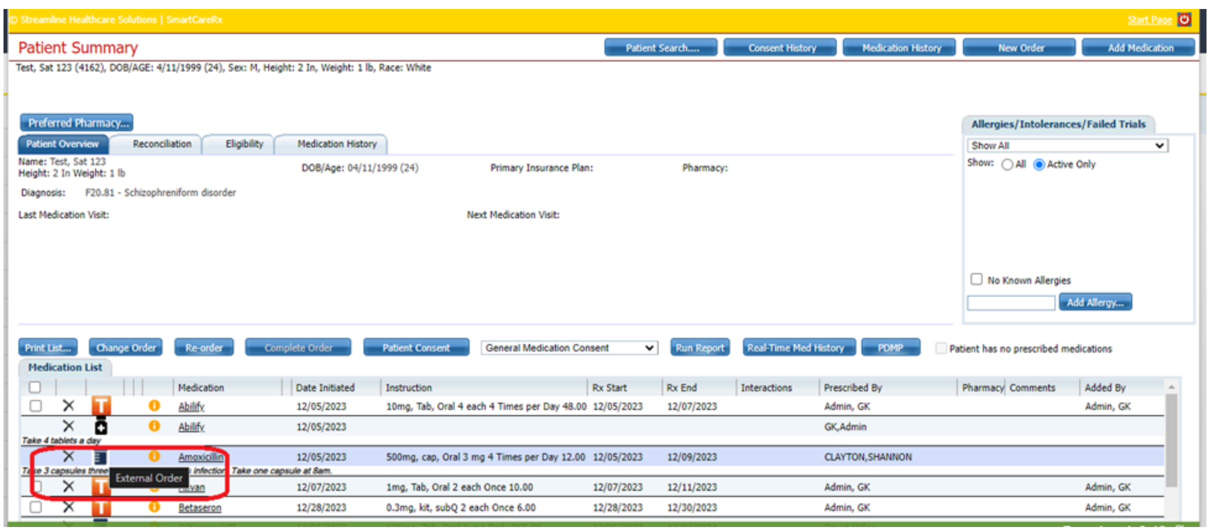
Navigation Path 1: Login to SmartCare Application – Select a client – Medication Management (Client)—Patient Summary screen (Rx Application) – Hover the mouse over the External Order icon.

Navigation Path 2: Login to SmartCare Application – Select a client – Medication Management (Client)—Patient Summary screen (Rx Application) – click on the Medication History screen – Hover the mouse over the External Order icon in the View Medication History Screen.

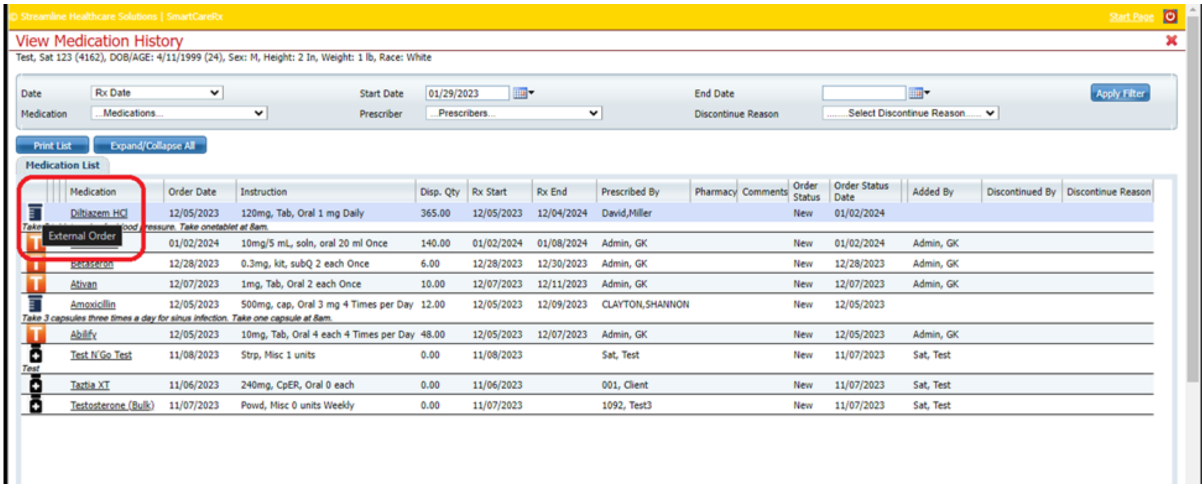
Functionality 'Before' and 'After' release:

With this release, a new tooltip has been added for External order entries in the RX application. When the User Hover the mouse over the External Order Icon, the 'External Order' is displayed as the tooltip message.

The below screenshot refers to the tooltip for External Order icon for the external ordered medication in the **Patient Summary screen**.



The below screenshot refers to the tool tip of External Order icon for the external ordered medication in the **View Medication History screen**.



Author: Manjunath Malipatil

106. Core Bugs # 126136: Client MAR: "Monday Through Friday" Medication Showing on Weekends as Well.

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

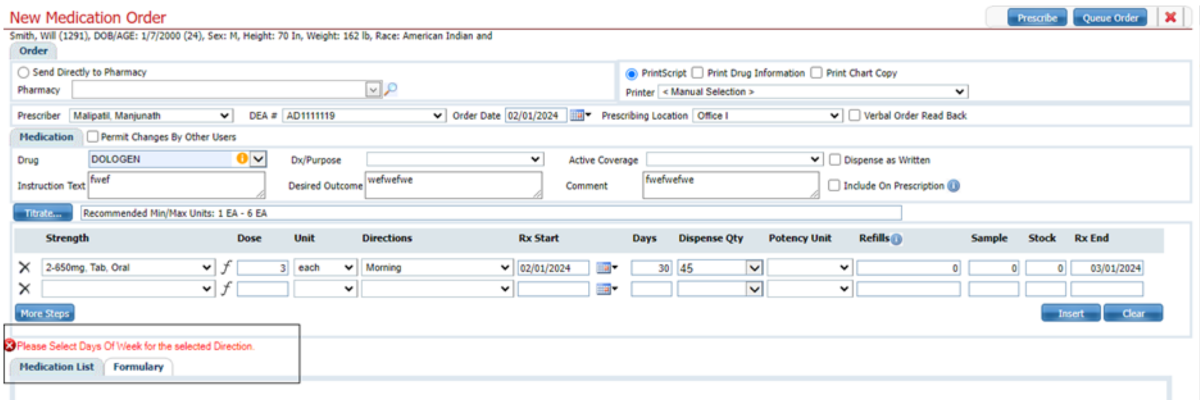
Navigation Path: Login to 'SmartCare' Application – Select a client – 'Medication management (Client)' – 'Patient Summary' Screen (Rx Application) – 'New Order' Button – Select a medication – enter all the required fields – Select a 'Direction which requires to select the days of week' – Click on 'Cancel' in the 'Select days of week' Pop-up – click on 'Insert' Button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'New Order' screen, while prescribing a medication when the user selected the direction which requires days of week to be selected in the 'Select days of week' pop-up, if the user didn't select a day in the pop-up and tried to insert the medication, the below validation message was not displayed.

Validation Message: "Please Select Days Of Week for the selected Direction"

With this release, the above-mentioned issue has been resolved. Now, the above validation message is displayed, when the user does not select the day in the 'select the days of week' pop-up and tries to insert the Medication.



Author: Rajgopal Yajurvedi

107. Core Bugs # 126268: Issues occurred in the 'Patient Summary' page when the user navigating to the 'Patient Summary' page.

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

Navigation Path: Login to SmartCare Application - 'Client' search – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Check Diagnosis codes displayed– Click 'Print List' button – 'ClientCurrentMedicationReport' opened – same Diagnosis codes displayed.

Functionality 'Before' and 'After' release:

Before this release, here were the issues observed. When the user navigated to the 'Patient Summary' page, the following issues were observed:

In the 'Patient Summary' Page, the Diagnosis code' characters were shortened, when the user clicked the 'Print List' button.

In the 'ClientCurrentMedicationReport' (Rx - Patient Summary - Print list), the below error message was displayed when 'Diagnosis codes' were more than 200 characters.

Error Message: "Subreport could not be shown"

With this release, the above-mentioned issue has been fixed. Now, the 'Diagnosis codes' characters are not trimmed and displayed properly when the user clicks the 'Print List' button. No error message is displayed in the 'ClientCurrentMedicationReport' and the Diagnosis codes are displayed properly.

Author: Rajgopal Yajurvedi

108. Core Bugs # 126724: Rx: Warning message displayed while running Rx app in Visual Studio.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. While running the Rx app in Visual Studio, the Visual Studio output window displayed the below warning message:

Warning message: ConfigurationSettings.AppSettings' is obsolete: 'This method is obsolete, it has been replaced by System Configuration! System.Configuration.ConfigurationManager.AppSettings'

With this release, the above mentioned issue has been resolved. Now, this obsolete warning message is not displayed while running the Rx App in Visual Studio.

Author: Rajgopal Yajurvedi

109. Core Bugs # 126772: Improvement to min and max dose calculations.

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

Navigation Path: 'Client' – 'Medication Management (Rx)' – Rx Application – 'Patient Summary' screen – click on 'New Order' button – 'New Medication Order' Page - Select the Drug – Fill all required fields – Check Recommended Min/Max range.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the New Medication Order page, when the user selected the drug, the application's logic was not calculating the precise Recommended Min/Max range for the drug. The logic was calculating the recommended Min/Max range for adult patients only.

With the release, the above mentioned issue has been resolved. Now, a new logic is added to calculate the precise Recommended Min/Max range for both adult and paediatric patients.

Author: Rajgopal Yajurvedi

110. Core Bugs # 126837: Medication records were not saving in database properly for existing non ordered medication.

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

Navigation Path: Login to SmartCare Application - Search and select 'Client' – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Add Medication button – Add Medication Page - Select the Drug – Fill all required fields – click insert – click Save button - 'Patient Summary' screen – Select the Non Ordered Medication - Update Medication (Non Ordered Locally) screen – Select the radio button – Add/Update/Delete the medication – Click on Save - 'Patient Summary' screen – Navigate to Database – Check the non-ordered medication entry.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Update Medication screen, when a user Added/Updated/Deleted the non-ordered medication and clicked on the 'Save' button, then the medication records were not saving in database (table - ClientMedicationInstructions) properly for existing non ordered medication.

With this release, the above-mentioned issue has been resolved. Now, when the user Adds/Updates/Deletes the non-ordered medication and clicks Save button, then the records is saving in database (table - ClientMedicationInstructions) properly for existing medication.

Author: Rajgopal Yajurvedi

111. Core Bugs # 126908: ssp_ValidateLoginToken does not check if the TwoFactorDevice record is marked as record deleted.

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

Navigation Path 1: Client – 'Medication Management (RX)'– Rx Application –click on 'Start Page' – click on 'My Preference' – 'User Preferences' Page - 'EPCS Device Registration' section – Add/Update device – click on 'Save' button.

Navigation Path 2: Navigate to Database – Check 'TwoFactorAuthenticationDeviceRegistrations' table.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. When the user navigated from SmartCare to Rx Application, in the User Preferences page, when the user updated the multiple devices in EPCS Device Registration section, the Stored Procedure 'ssp_ValidateLoginToken' was returning duplicate record entries from the 'TwoFactorAuthenticationDeviceRegistrations' table (in the Database).

With this release, the above-mentioned issue has been resolved. Now, the logic is added to Stored Procedure 'ssp_ValidateLoginToken' to avoid the duplicate entries from the 'TwoFactorAuthenticationDeviceRegistrations' table when a user updates the multiple devices.

SAML (Single Sign On)

Reference No	Task No	Description
112	Core Bugs #126792	SSO Login Page " Input string was not in a correct format."

Author: Sunil Belagali

112. Core Bugs # 126792: SSO login page - "Input string was not in a correct format."

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

Navigation Path: 'SAML' Login page – Enter 'User code/Email' – Click 'Continue'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. An error log was generated for the SSO (Single Sign On) page button click event.

Error message "Input string was not in a correct format."

With this release, the above-mentioned issue is resolved. Now, the error log is not generated for the SSO page button click event.

Scanning

Reference No	Task No	Description
113	EII # 126113	Implementation to add a Cosigner to Scanned Documents.

Author: Lavanya Gowdru

113. EII # 126113: Implementation to add a Cosigner to Scanned Documents.

Release Type: Change **Priority**: High

Prerequisite: The user needs to scan and upload a new image by following the below **navigation path**:
1) My Office/Client --- Scanning --- Click on 'Scan a New Image' -- Scan the records by selecting Client (Medical Records) --- enter the required values --- Click on Save.

2) My Office/Client --- Scanning --- Click on 'Upload a new Image' icon --- Upload the documents by selecting Client (Medical Records) --- enter the required values --- Click on Save.

Navigation Path 1: Client --- 'Documents' --- Open the Scanned/Uploaded records --- Expand the '+' icon to get the Co-Sign section --- Add a Co-Signer under 'Co-Signer' section --- Select the respective Co-Signer under Co-Signer section and click on Co-Sign --- Note the record is Co-Signed Successfully.

Navigation Path 2: My Office --- 'My Documents' --- Open the Scanned/Uploaded records --- Expand the '+' icon to get the Co-sign section --- Add a Co-Signer under 'Co-signer' section --- Select the respective Co-signer under Co-signer section and click on Co-sign --- Note the record is Co-signed Successfully.

Navigation Path 3: My Office --- 'Scanning' --- Open the Co-signed records.

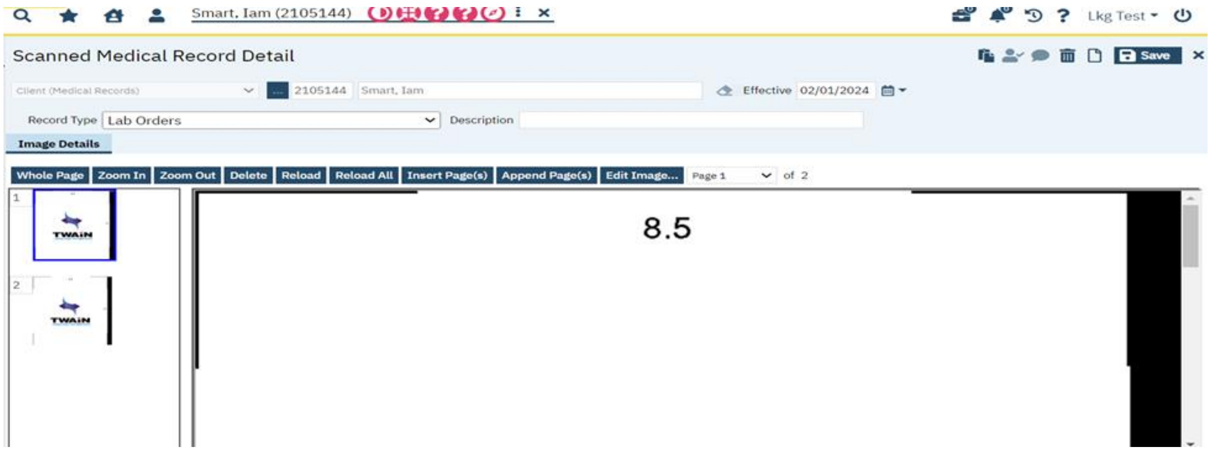
Navigation Path 4: Client --- 'Scanning' --- Open the Co-signed records.

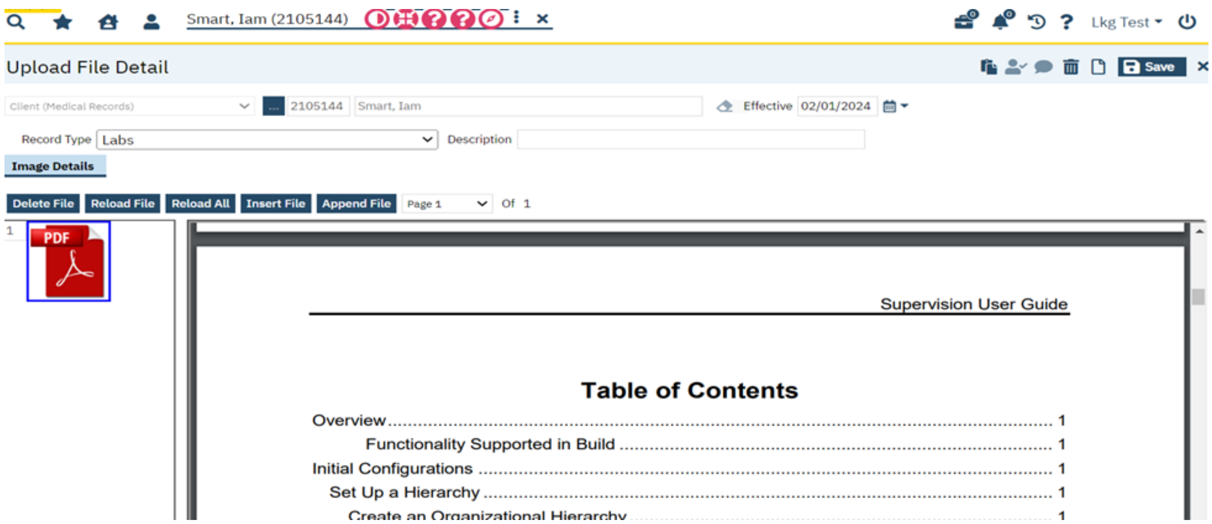
Functionality 'Before' and 'After' release:

With this release, the system will allow to add Co-Signers for scanned documents and allow the Co-Signers to Co-Sign the Scanned documents.

1. In the Scanned Medical Record Detail and Upload File Detail screens, Scan or Upload the documents by selecting the 'Client (Medical Records)' and enter the required values and Save.

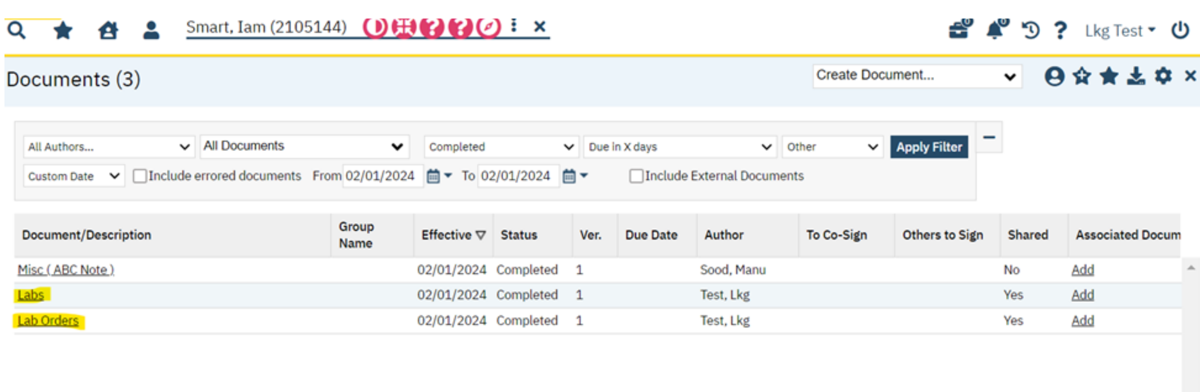
Please Refer the below Screenshots:



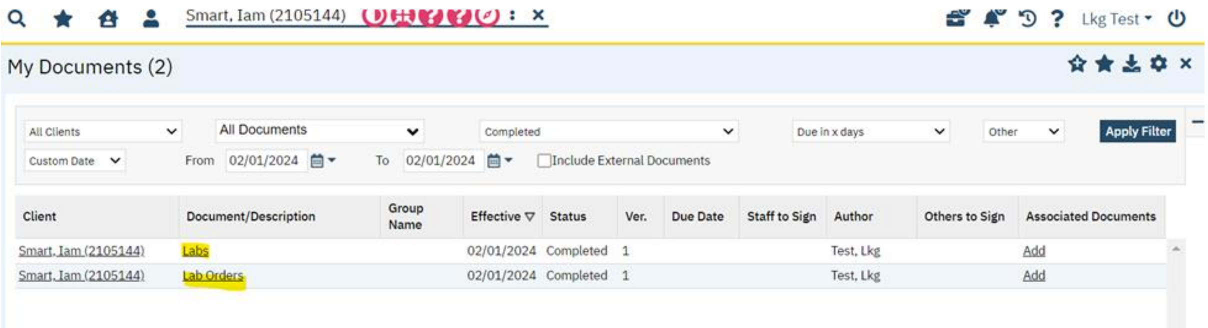


2. Open the Scanned/Uploaded document from the Documents/My Documents List page and add a Co-Signer to it.

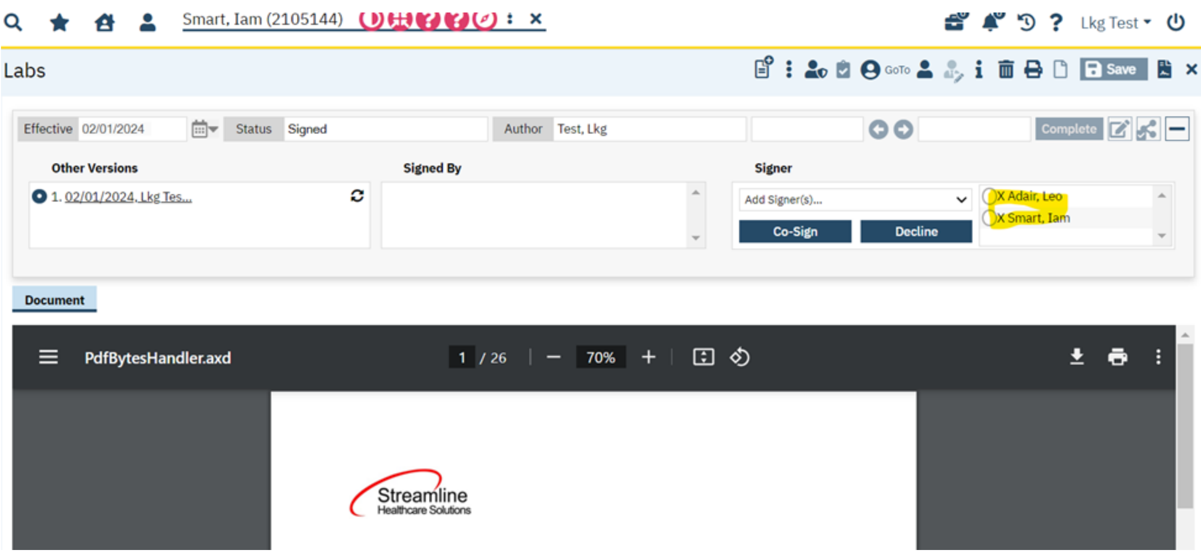
Documents List page:



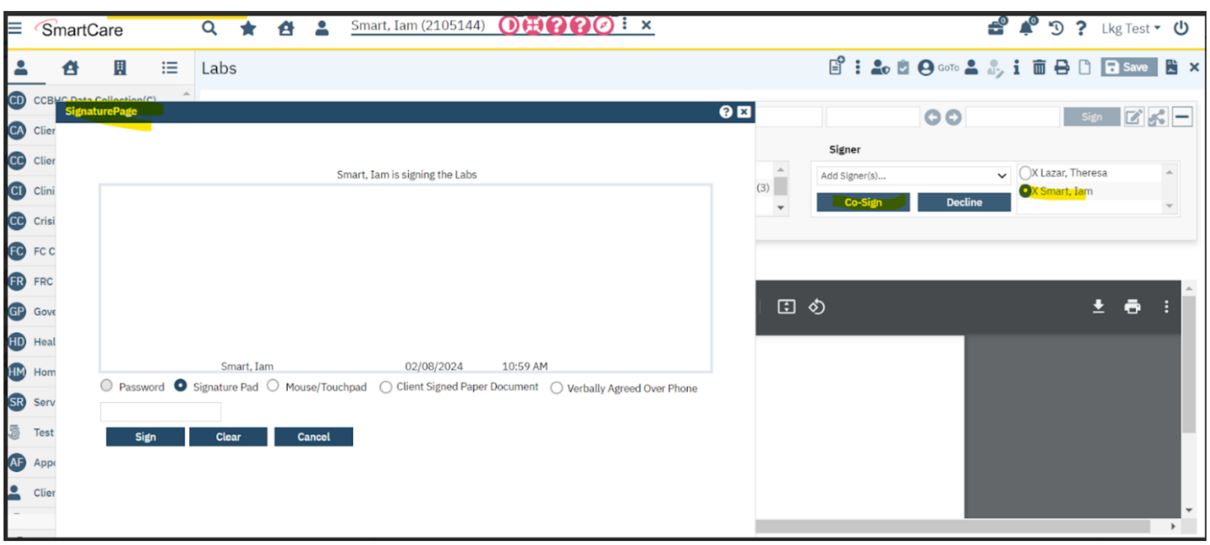
My documents List page:

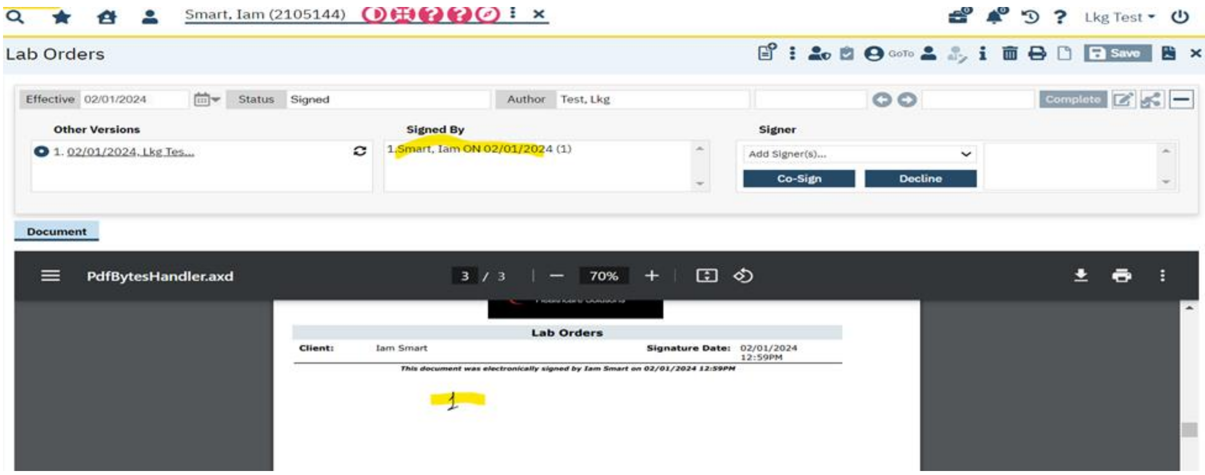


Adding a Cosigner:

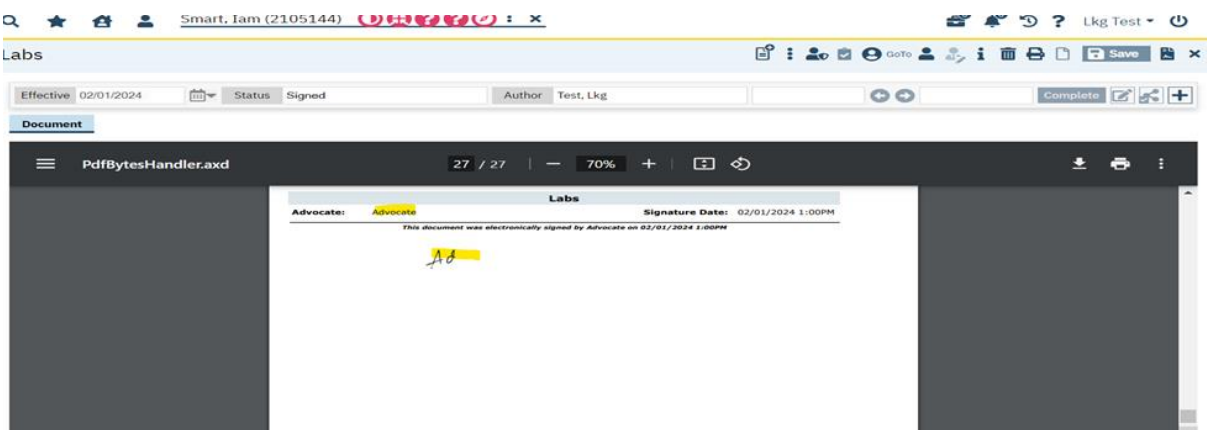


3. On clicking Radio buttons select the added Co-Signers under Co-Sign section in the Document screen and sign the respective document. The Document will be Co-Signed successfully.



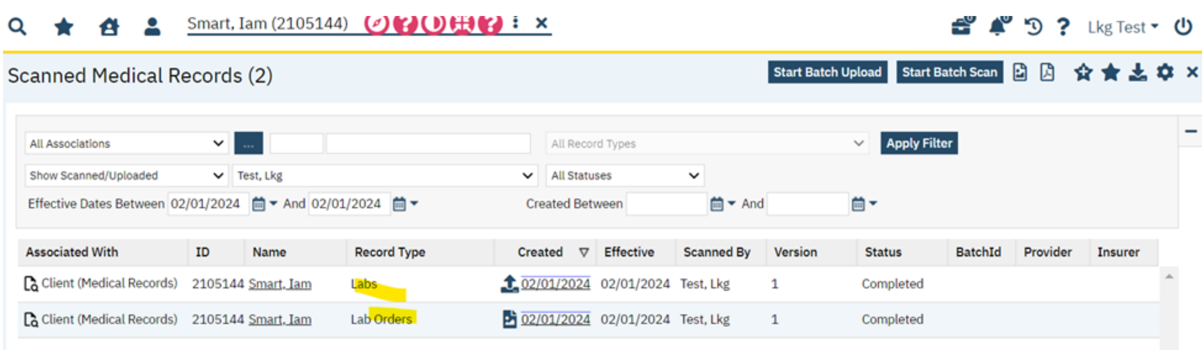


Cosigner display in PDF:

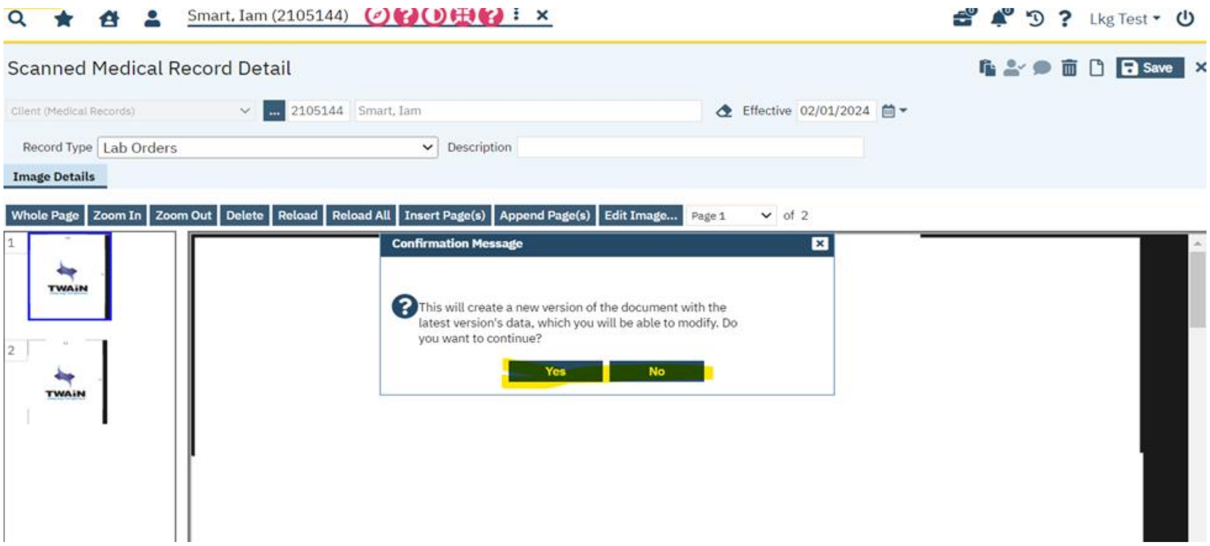


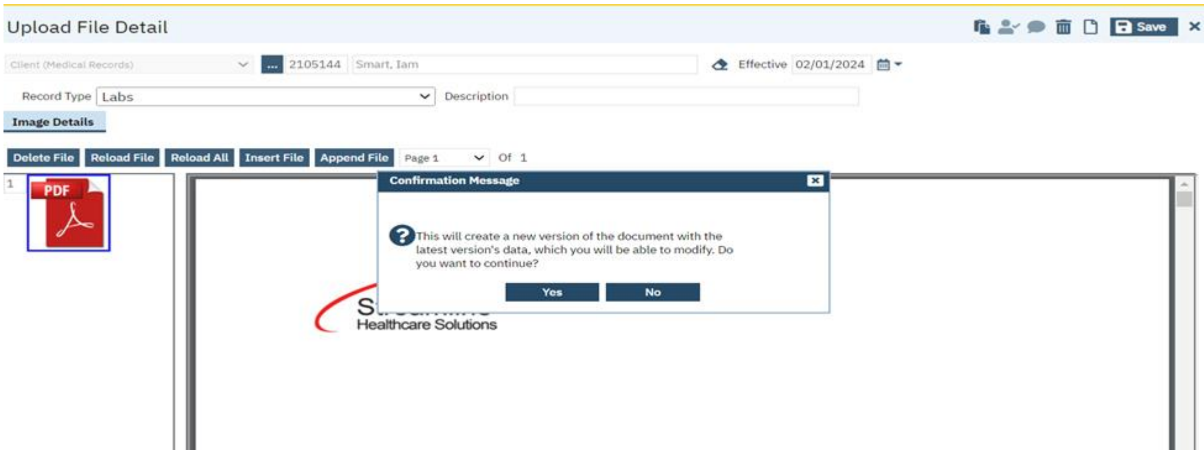
4. Open the respective Co-Signed Records by navigating to Scanned Medical Records List (Scanning under Client/My Office).

Refer the below Screenshot:



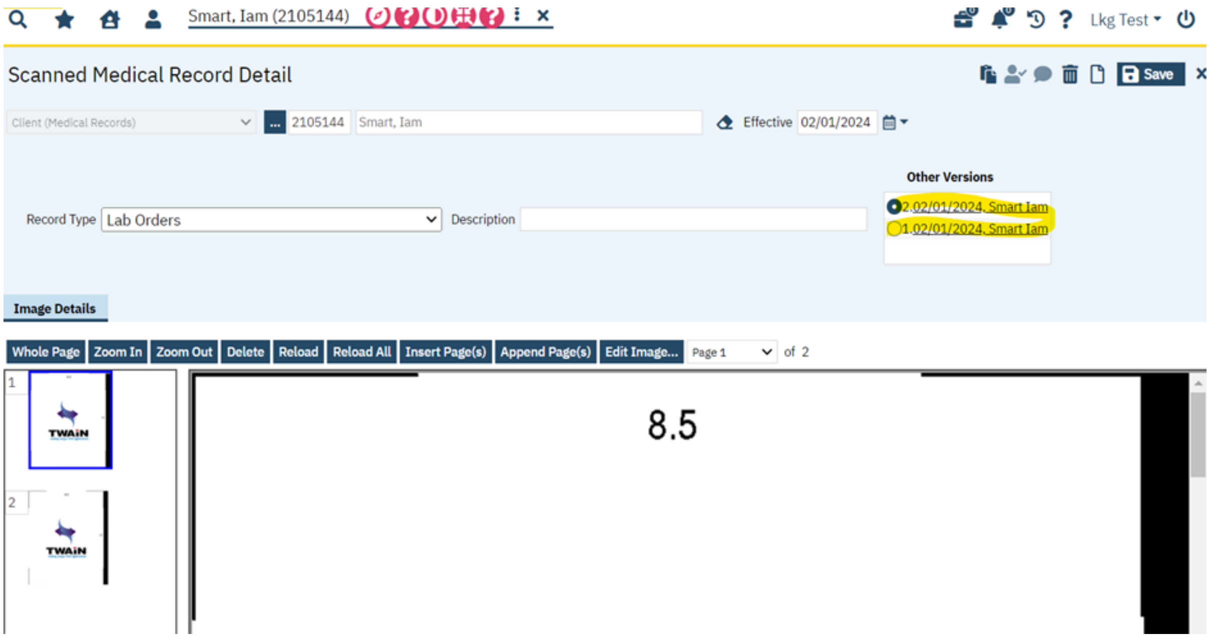
5. A. Open the Co-Signed records from the Scanned Medical Records List page and note that the below Confirmation Message popup will be displayed.

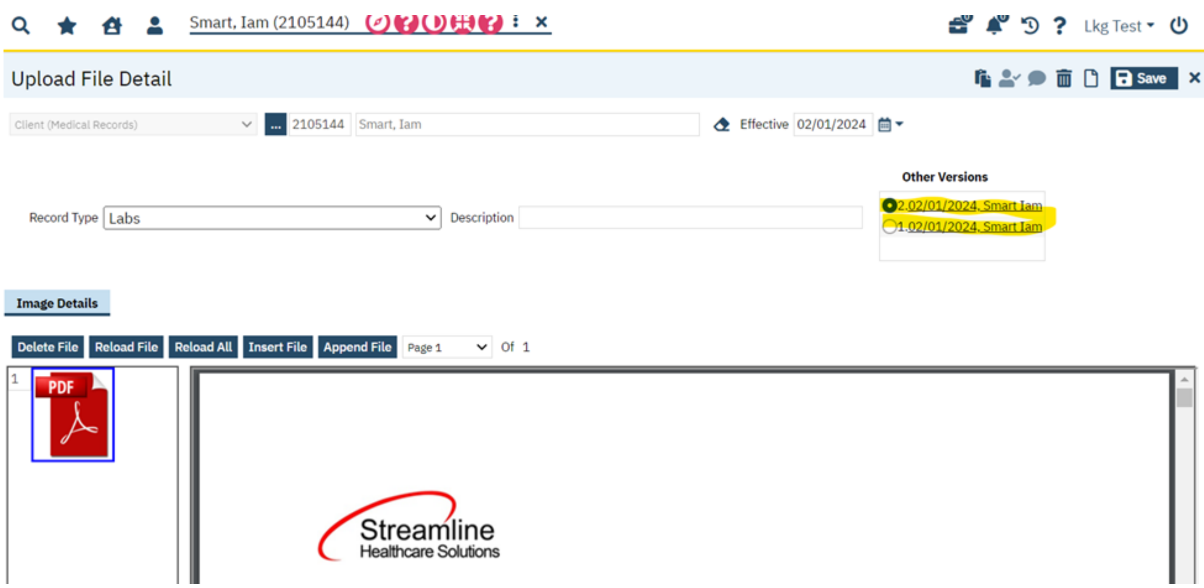




B. On clicking Yes in the confirmation popup, the new version will be created and all the operations will be enabled to perform in the new versioned document.

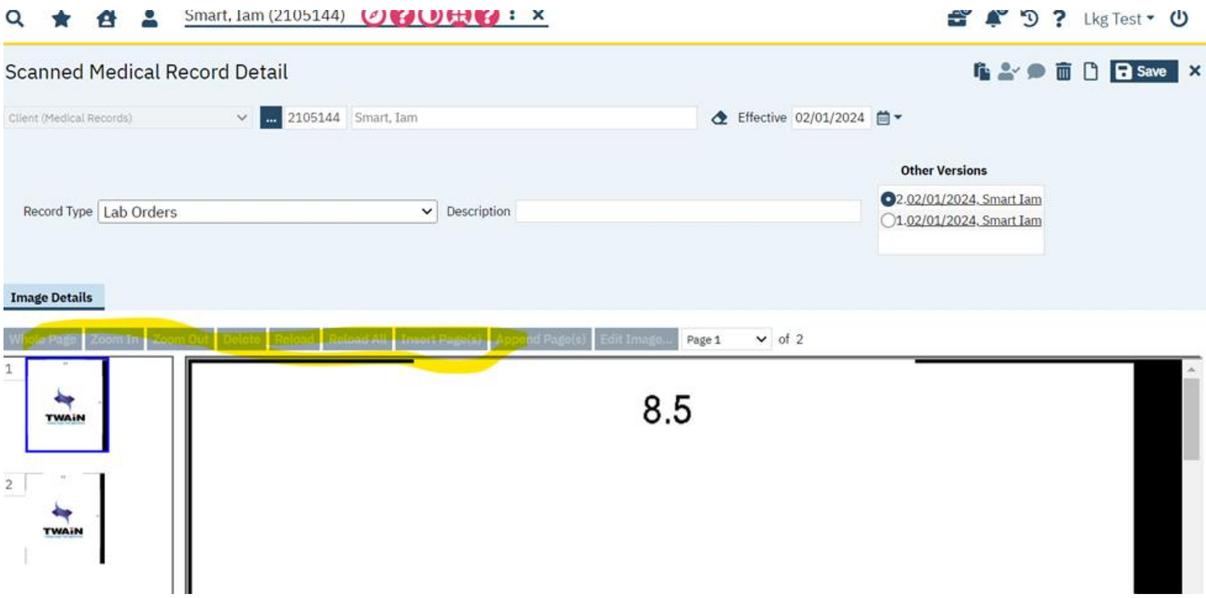
Refer the below Screenshots:

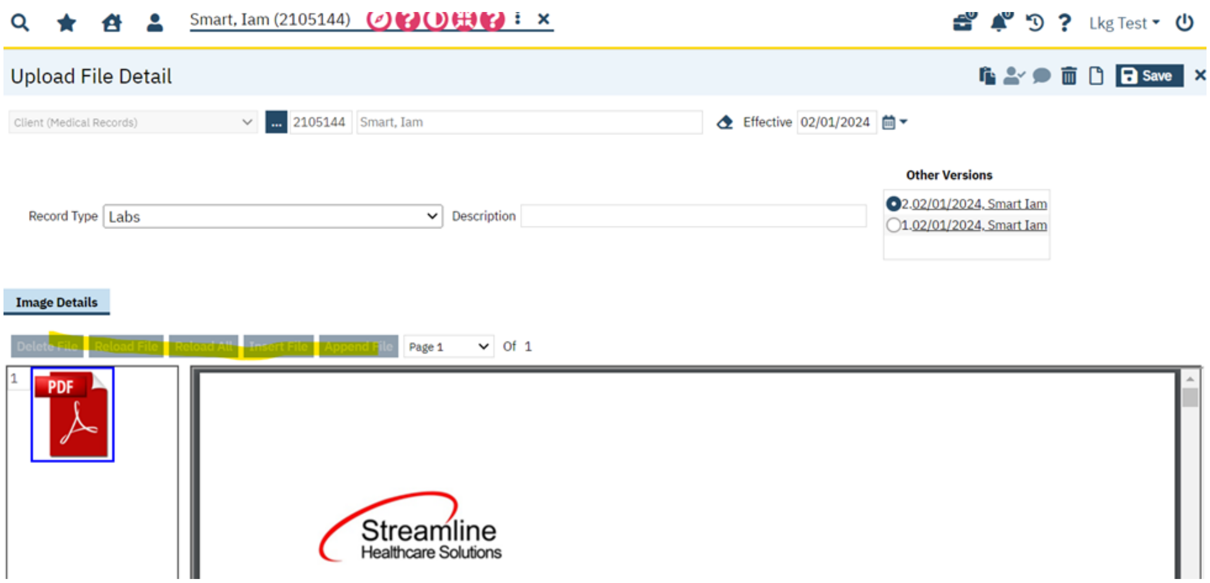




C. On clicking No option in confirmation popup, the new version will not be created and all the operation will de disabled in the Scanned Medical Record Details screen and Insert, Upload, Append…. etc. operations cannot be done.

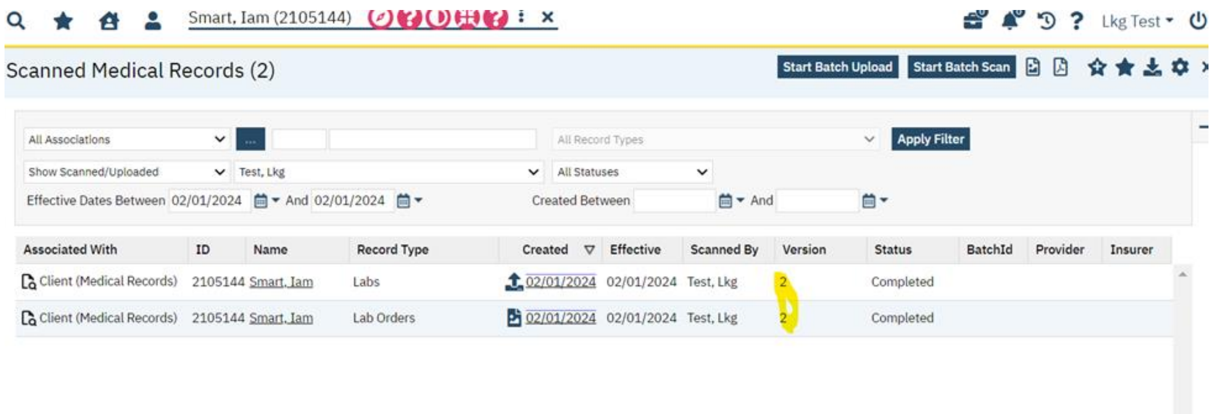
Refer the below Screenshot:





D: The Version column is implemented in the Scanned Medical Record List page to identify the versions

Refer the Screenshot below:



Note: The user can add multiple Co-Signers and Co-Sign the Scanned/Uploaded records from Documents/My Documents list page and will be able to create multiple versions through Scanned Medical Records List page on clicking Yes in the confirmation popup.

Services

Reference No	Task No	Description
114	Core Bugs # 127032	An Error message while saving the Service Details Page.
115	Core Bugs # 126879	Recurring Services: The user is not able to edit the 'Recurrence service' when the appointment created for that service is deleted even if the respective service exists.
116	Core Bugs #126999	The appointment is no longer on Schedule.

Author: Suganya Sivakumar

114. Core Bugs # 127032: An Error message while saving the Service Details Page.

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

Navigation Path: 'Client' search --- Select a 'Client' --- Navigate to 'Services' --- 'Client' --- Click on the 'New' icon --- 'Service Details' Page --- Enter all the required fields --- Click on the 'Save' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user entered all the values in the 'Service Details' screen and then clicked on the 'Save' icon, the following error message was displayed.

Error Message: "Please Enter Valid Duration."

With this release, the above-mentioned issue has been resolved. Now, the user can save the 'Service Details' screen successfully without any error message being displayed.

Author: Aishwarya Bommaklar

115. Core Bugs # 126879: Recurring Services: The user is not able to edit the 'Recurrence service' when the appointment created for that service is deleted even if the respective service exists.

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

Navigation Path 1: 'Client' search – 'Services' List Page – Click on the 'New' icon – Enter all the required details – Click on the 'Save' icon – Click on 'Make Recurring' icon – Enter the details – Select 'Create Immediately' checkbox – Click on 'OK' button.

Navigation Path 2: 'Client' search – 'Services' List Page – Select one of the above recurrence services and click on the 'DOS' hyperlink – Click on the 'Edit Recurrence' icon – change the 'End Date' and Select 'Create Immediately' checkbox – Click on 'OK' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to change the 'End Date' in the 'Recurring Services' pop-up by editing the 'Recurrence Pattern', the changes were not reflected. This is because the appointment created to that service was deleted even if the respective service exists.

With this release, the above-mentioned issue has been fixed. Now, when the user tries to change the 'End Date' in the 'Recurring Services' pop-up by editing the recurrence pattern, the appointment created for the service is not deleted when the respective service exists.

Author: Suganya Sivakumar

116. Core Bugs # 126999: The appointment is no longer on Schedule.

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

Prerequisite:

- Create a 'Scheduled Service appointment and create the 'Recurrence services'.
- Select any one of the 'Recurrence services' and change the status.

Navigation Path: Perform Client Search --- Select Client --- Navigate to 'Services' --- 'Client' --- Click on the 'New' Icon --- 'Service Details' Page --- Enter all the required fields --- Click on the 'Save' Icon --- Click on 'Recurrence' Icon --- 'Recurring Services' pop-up --- Select the 'Dates' --- Click on 'Ok' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user selected the 'Recurrence services' and changed the status of the 'Service' to any (Show/No Show/Cancel/Error), the changes were made to that service impacted the other recurrence services.

With this release, the above-mentioned issue has been resolved. Now, the changes made to one recurrence service will no longer affect the other services, when the user selects the 'Recurrence services' and changes the status of the 'Service' to any (Show/No Show/Cancel/Error).

Services/Notes

Reference No	Task No	Description
117	EII # 126075	Service note and group note PDF changes.
118	EII # 126139	Implementing Sign button functionality for Client Signature to Verify Service(s) Received
119	Core Bugs # 126711	Error message indicating something is duplicating the document when staff is trying to save the note.
120	Core Bugs # 126848	Regenerate Charge Dropdown Option on "Services - My Office" Screen Not Functioning.
121	Core Bugs # 126986	Adding the custom hook for the Core SSP.
122	Core Bugs # 127018	Staff and proxy user not able to edit the signed Service Notes.

Author: Kiran Tigarimath

117. EII # 126075: Service note and group note PDF changes.

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

Prerequisite: The 'Show Encounter Form' radio button is set 'Yes' for the selected service note/Group note under 'Document Codes Detail' screen.

Navigation Path 1: 'Client' -- 'Service Note' Screen.

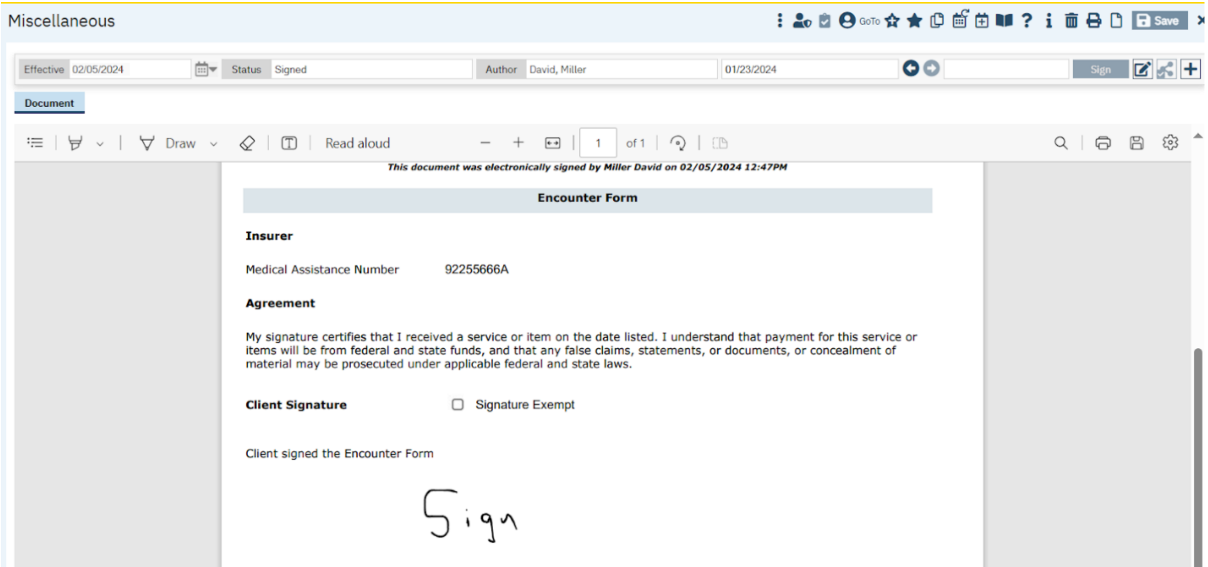
Navigation Path 2: 'My Office' -- 'New' -- 'Group Details' -- 'Schedule' -- 'New Group Service' -- 'Group Service Detail' Screen.

Functionality 'Before' and 'After' release:

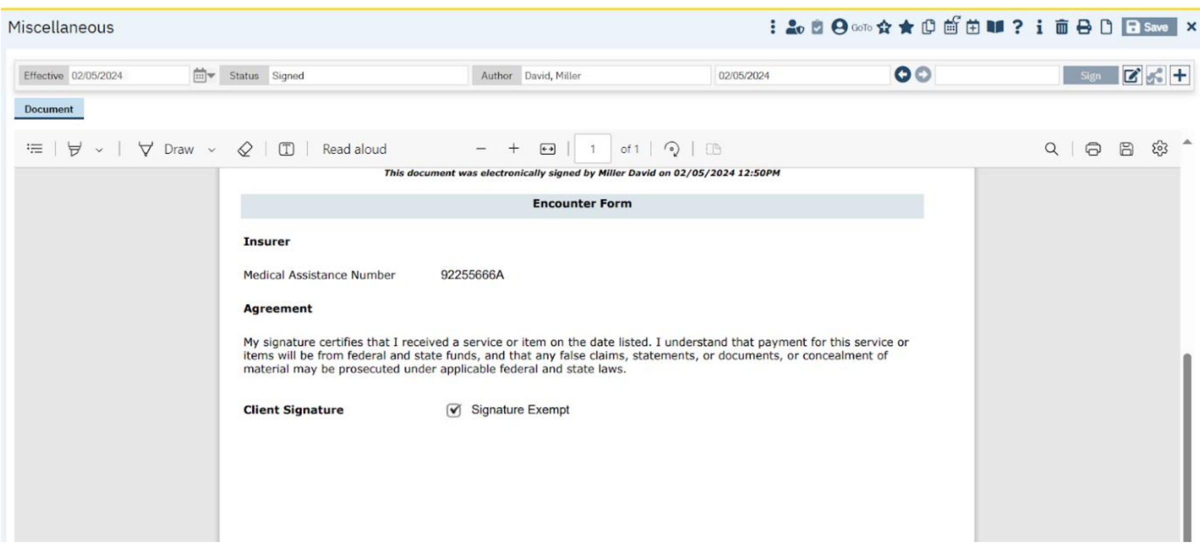
With this release, the below mentioned changes are implemented for the encounter form PDF and service notes/group services.

1. The client signature in service notes/Group services of the same encounter form will be displayed in the 'signed PDF' only, after the author signs the encounter form client signature. The Encounter form will not be displayed for 'in progress' status notes.

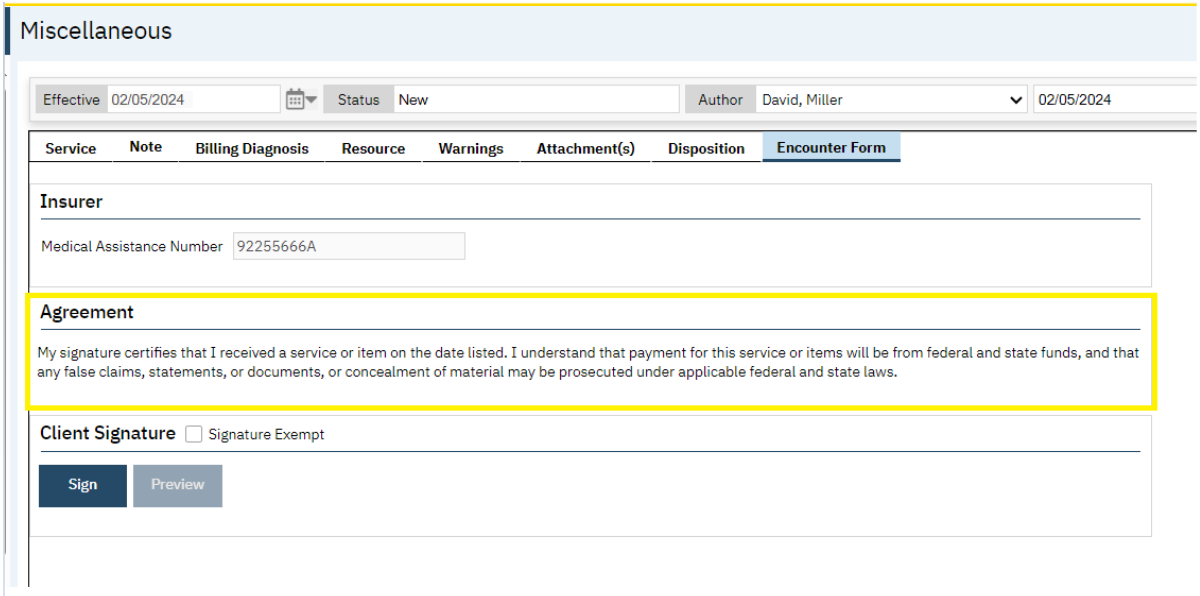
1.1. Encounter form signed:



1.2. Encounter form Signature exempted:



2. The hot key functionality is Implemented by entering (Ctrl+Alt+L) to the agreement section text in the Encounter form. The user can change the label when required.



Author: Akshay Vishwanath

118. EII # 126139: Implementing Sign button functionality for Client Signature to Verify Service(s) Received.

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

Prerequisite: The user needs to select a rule 'Require Client Signature on the Encounter Form' in Procedure Code Details Screen by following the below **Navigation path**:

'Administration' -- 'Procedure/Rates' -- 'Procedure/Rates' list page -- Click on Procedure name hyperlink -- 'Procedure Code Details' page -- 'Rules' section -- select 'Require Client Signature on the Encounter Form' checkbox option.

Navigation Path 1: 'Client' -- 'Services/Notes' -- 'Services/Notes' list page -- Click on 'New' icon -- Select the required Program, Procedure and Location where the Service Note document code has 'Show Encounter Form' selected as Yes.

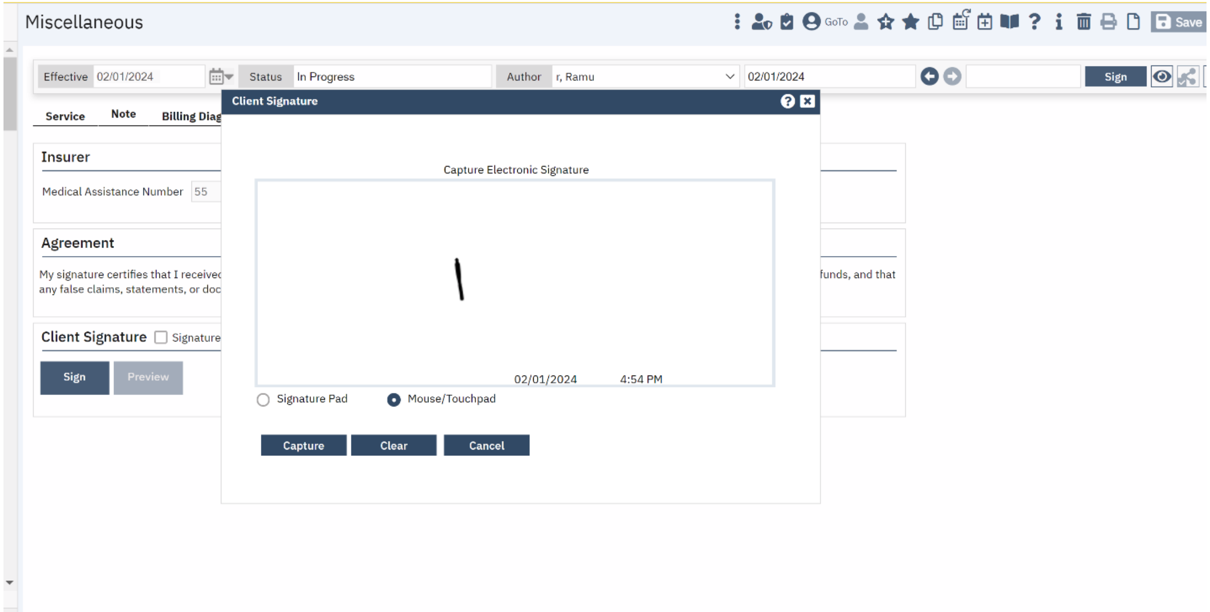
Navigation Path 2: 'My Office' -- 'Groups' -- 'Groups' list page -- Click on 'New' icon -- 'Group Details' page -- Enter required data and select required Group Note, Program, Procedure and Location where the Service Note document code have 'Show Encounter Form' selected as Yes -- Click on 'Schedule' tab -- Click on 'New Group Services' button -- 'Group Service Client' popup -- Enter and select required data and click on 'Select' button -- 'Group Service Detail' page.

Functionality 'Before' and 'After' release:

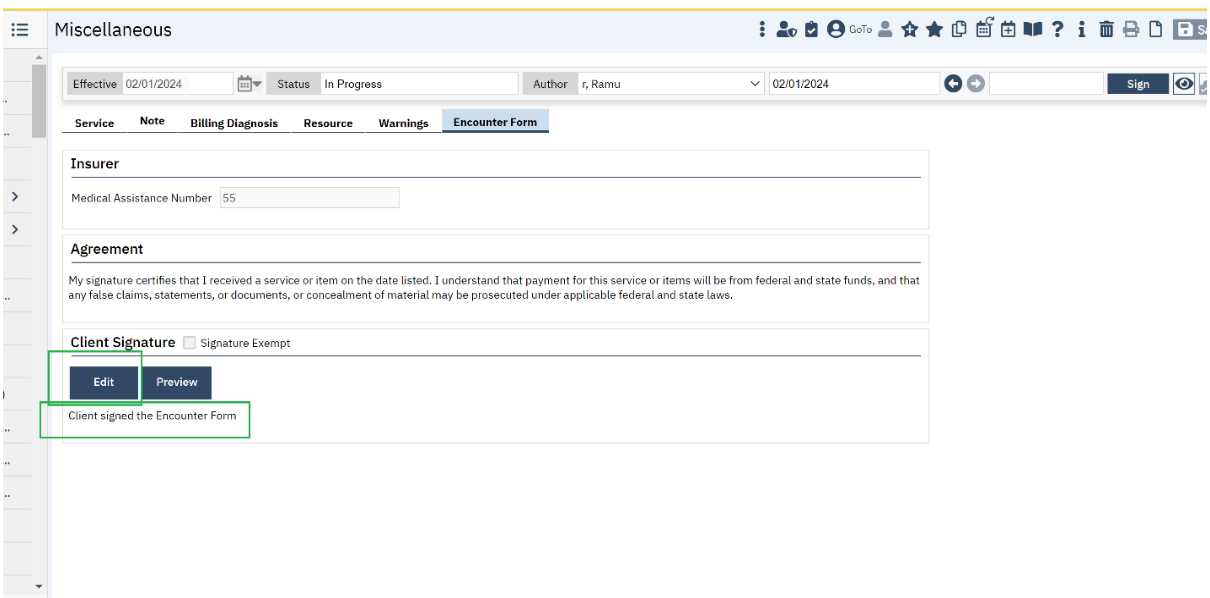
Purpose: To obtain a signature from client after every service to certify that the service has been provided and/or received.

Services/Notes:

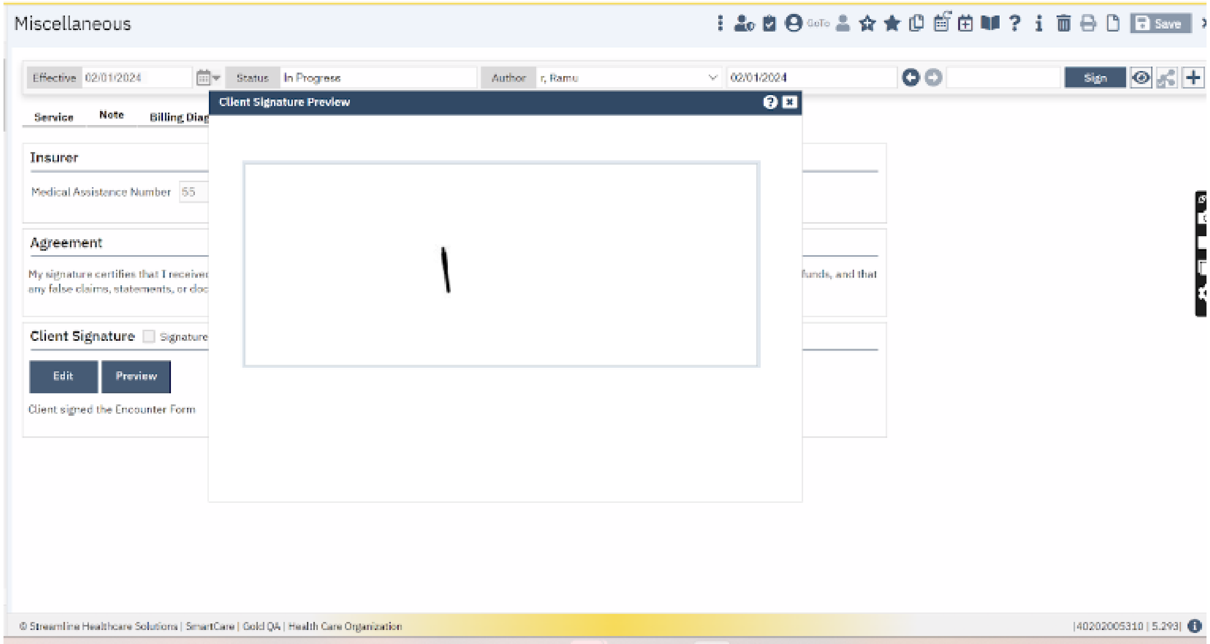
- When the user clicks on sign button in the Encounter form, the Client Signature pop-up opens with Signature Pad and Mouse/Touch Pad as signing option.



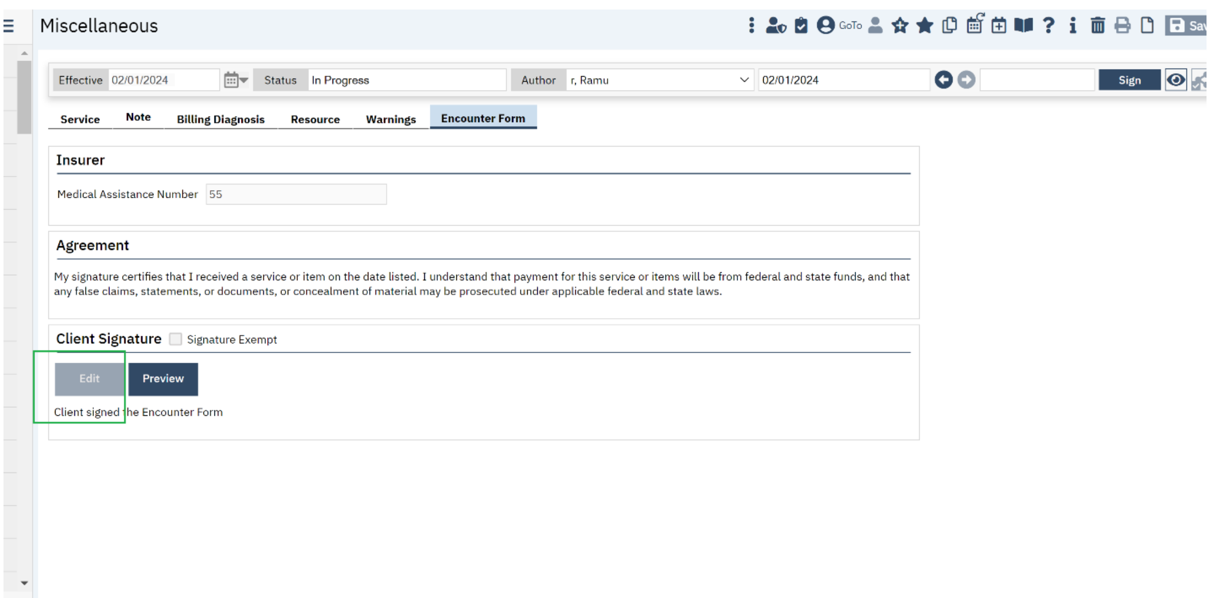
- Once the user signs Client Signature pop-up 'Client signed the Encounter Form' text is displayed and Sign button will be changed to 'Edit' option and Preview button will enabled and 'Signature Exempt' check box will be disabled.



- Once the user click on 'Preview' button, the Client signature which is captured previously will be displayed.

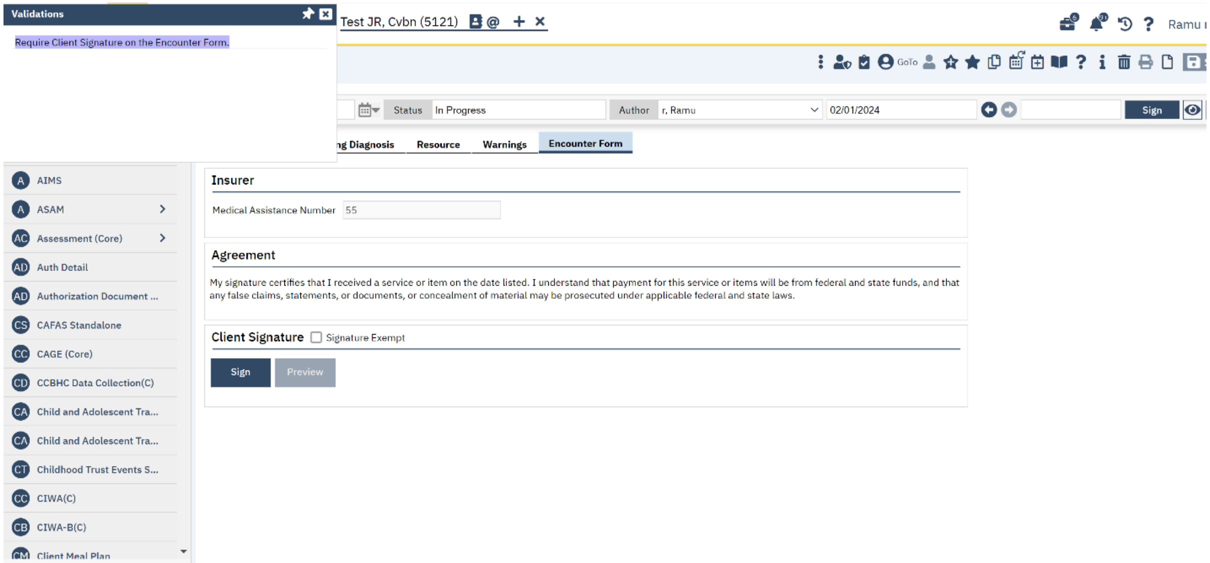


- Once the user signs the service note and edit the service note, 'Edit' button in the 'Encounter form 'will be disabled.

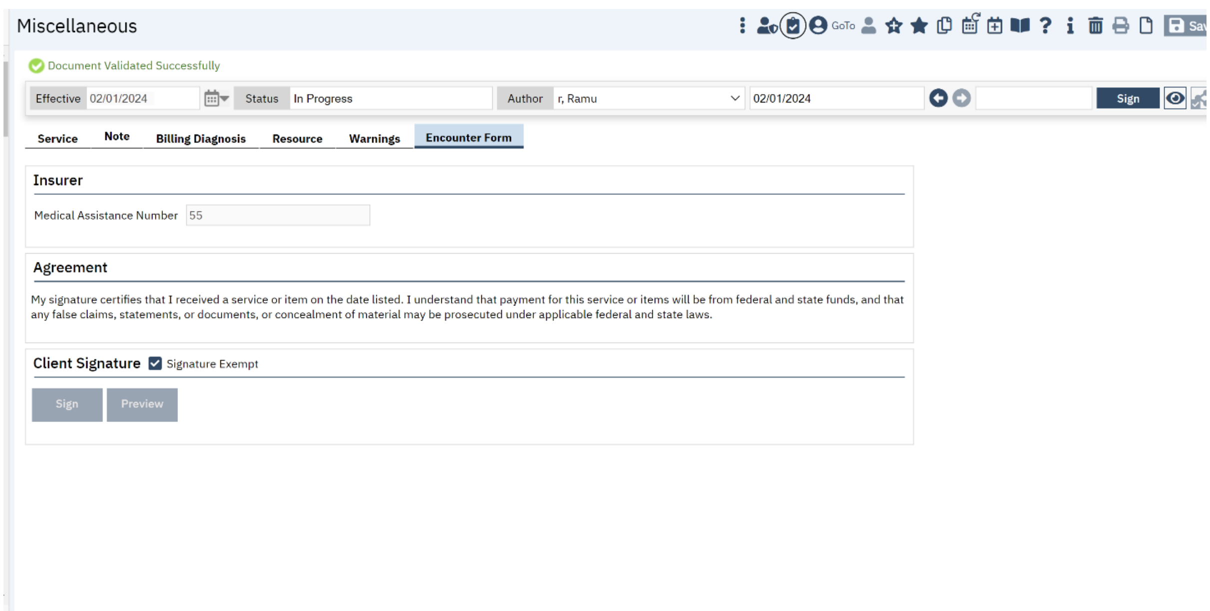


- When 'Require Client Signature on the Encounter Form' check box is checked in Procedure code details screen, then the client signature on the 'Encounter Form' is mandatory and the below validation message will be displayed if there is no client signature on 'Encounter Form'.

  Validation Message:" Require Client Signature on the Encounter Form."

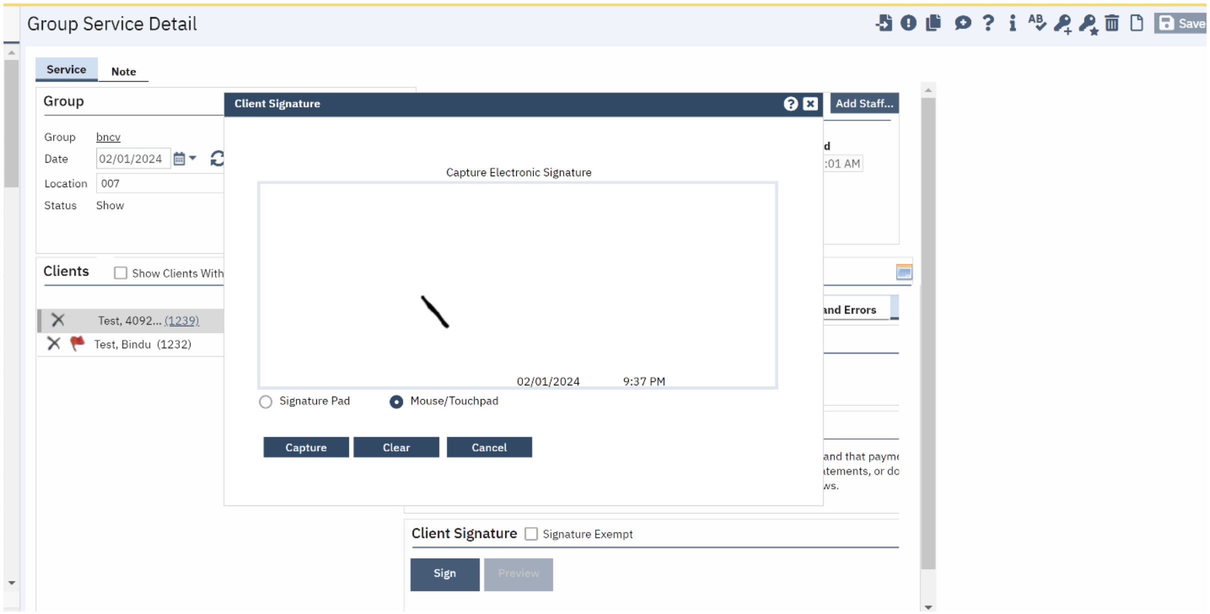


- When 'Require Client Signature on the Encounter Form' check box is checked in Procedure code details screen, then the client signature on the 'Encounter Form' is not mandatory only when 'Signature Exempt' check box is checked and the 'Sign' button will be disabled on checking Signature Exempt' check box.

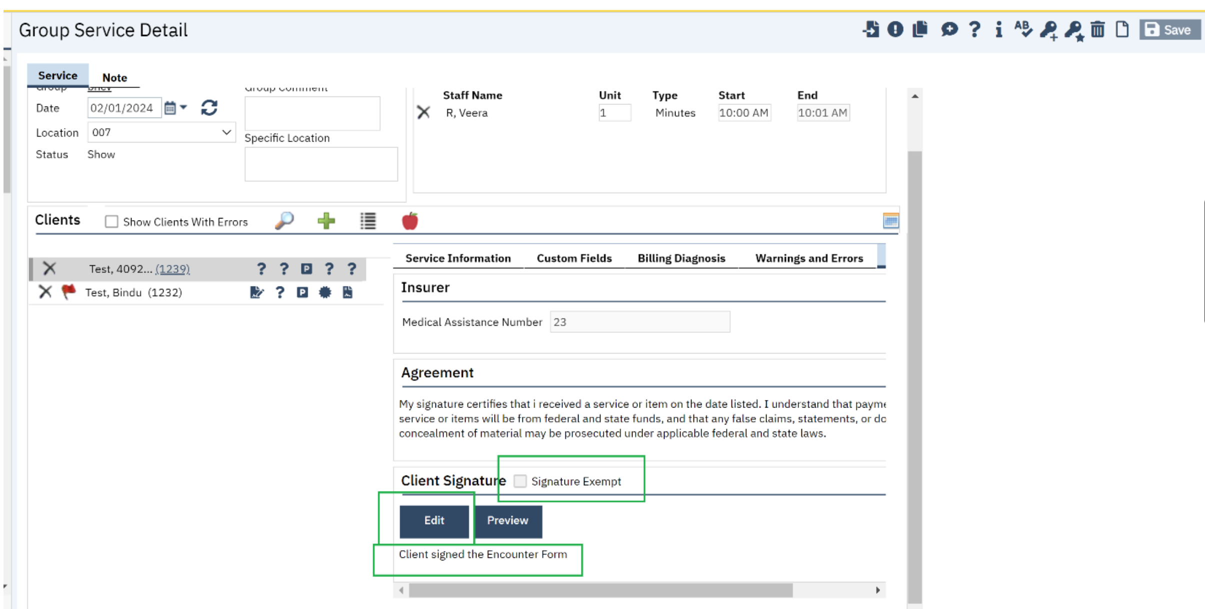


Group Service Detail:

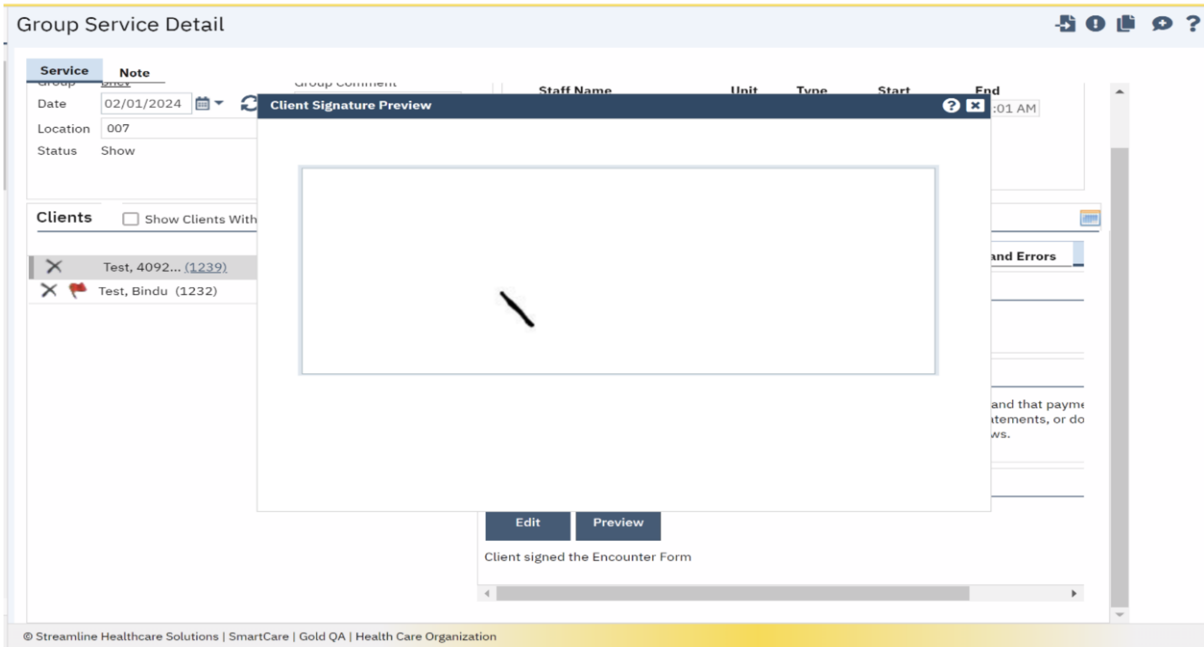
- When the user clicks on sign button in the 'Encounter form', the Client Signature pop-up opens with Signature Pad and Mouse/Touch Pad as signing option.



- Once the user signs Client Signature pop-up, the 'Client signed the Encounter Form' text is displayed and the Sign button will be changed to 'Edit' option and the Preview button will enabled and the 'Signature Exempt' check box will be disabled.

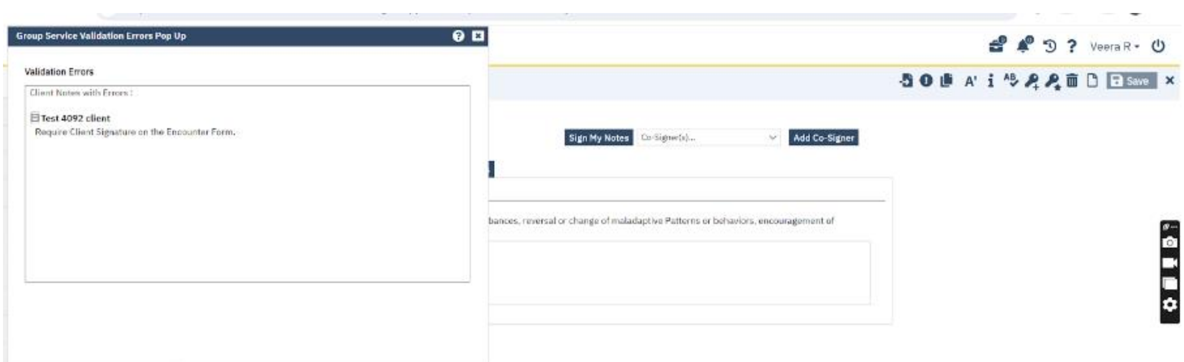


- Once the user clicks on 'Preview' button, then the Client signature which is captured previously will be displayed.

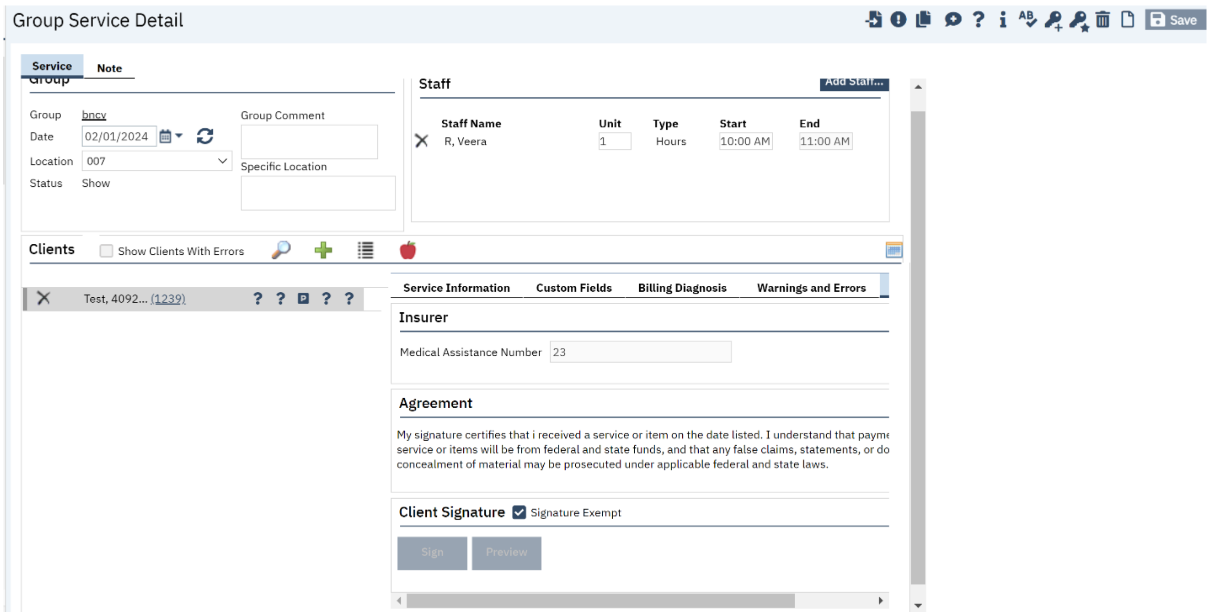


- When 'Require Client Signature on the Encounter Form' check box is checked in Procedure code details screen, then the client signature on the 'Encounter Form' is mandatory and the below validation message will be displayed when there is no client signature on the 'Encounter Form'.

  Validation Message:" Require Client Signature on the Encounter Form."



- When 'Require Client Signature on the Encounter Form' check box is checked in Procedure code details screen, then the client signature on the 'Encounter Form' is not mandatory only when 'Signature Exempt' check box is checked and 'Sign' button will be disabled on checking Signature Exempt' check box.



Author: Chaithra Kunjilana

119. Core Bugs # 126711: Error message indicating something is duplicating the document when staff is trying to save the note.

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

Navigation Path: Client - 'Clinical Documents' – 'Services/Notes' – click on New - Select the procedure related to 'Individual Service Note' – Enter the required values – Navigate to any other screen – navigate back to Service Notes from unsaved changes -- save/sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to save the 'Individual Service Note' navigating from unsaved changes, the below mentioned error message was displayed and the user was unable to save the Note.

Error Message: *"Violation of PRIMARY KEY constraint 'customDocumentIndividualTherapyNote_p'. Cannot insert duplicate key in object 'dbo.custom,DocumentIndividualTherapyNote'. The duplicate key value is (1119210). The Statement has been Terminated."*

With this release, the above-mentioned issue has been resolved. Now, the user can save the 'Individual Service Note' navigating from unsaved changes without an error.

Author: Debanjit Das

120. Core Bugs # 126848: Regenerate Charge Dropdown Option on "Services - My Office" Screen Not Functioning.

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

Navigation Path: Services (My Office) screen -- Select a Service and click on 'Regenerate Charge'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Services (My Office) screen, when a user clicked on the 'Regenerate Charge' option from the 'Select Action' dropdown, the services was not regenerated for the new Charge.

With this release, the above-mentioned issue has been resolved. Now, the services will be regenerated from the Services (My Office) screen, when a user clicks on the 'Regenerate Charge' option from the 'Select Action' dropdown.

Author: Chaithra Kunjilana

121. Core Bugs # 126986: Adding the custom hook for the Core SSP.

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

Navigation Path: Open a client -- Go to Services/Notes -- New -- Select the procedure related to 'Psychiatric Note' -- Enter the required values -- Sign.

Functionality 'Before' and 'After' release:

With this release, a custom hook has been added in the core SP (Stored Procedure) "ssp_PostUpdateConfigurationForPsychitricNoteRDL" to handle the custom PDF name update in the DocumentCodes table, based on the configuration key (ShowOnlySelectedFieldsInEMNoteReport) value.

Note: If the customer is using the custom PDF in Psychiatric Note, then the Psychiatric Note PDF name will point to the custom PDF. Otherwise, it will point to the core PDF.

Author: Kiran Tigarimath

122. Core Bugs # 127018: Staff and proxy user not able to edit the signed Service Notes.

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

Prerequisite: Set the field 'Allow Editing By Non Authors' to 'Yes' in 'Document Code Details Screen.

Navigation Path 1: 'Client' - 'Services/Notes'.

Navigation Path 2: 'Administration' - 'Services/Notes'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The staff and proxy user of the staff were not able to edit the signed services notes due to locks creation, even though 'Allow Editing By Non Authors' field is set to 'Yes' in Document Codes Detail screen.

With this release, the above-mentioned issue is fixed. Now, the staff and proxy user of the staff are able to edit the signed services notes, when 'Allow Editing By Non Authors' field is set to 'Yes' in Document Codes Detail screen.

Signature Popup

Reference No	Task No	Description
123	Core Bug # 126928	Signature pad not signing after unplugged.

Author: Chandan Kanchinkoti

123. Core Bugs # 126928: Signature pad not signing after unplugged.

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

Pre-requisite: Signature pad is unplugged and plugged in again.

Navigation Path: Client Search - Select a Client - Documents - Select any document - New - Enter all the details – Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the signature pad was plugged in again and when the user tried to sign the document, the application was not allowing the user to sign the document.

With this release, the above-mentioned issue has been resolved. Now, when the signature pad is plugged in again, the user can sign the document using the signature pad.

SmartCare Improvements

Reference No	Task No	Description
124	EII # 126278	No action on clicking Reset button in the Forgot Password pop up for Active Directory login user.
125	EII # 126343	Changing Organization field's length to 250 and Changing CSP to SSP for Disclosure Screen
126	Core Bugs # 126819	Document Codes: 'Editable After Signature' radio button issue.
127	Core Bugs # 126860	Performance issue while logging in to the SmartCare.

Author: Rakesh Naganagoda

124. EII # 126278: No action on clicking Reset button in the Forgot Password pop up for Active Directory login user.

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

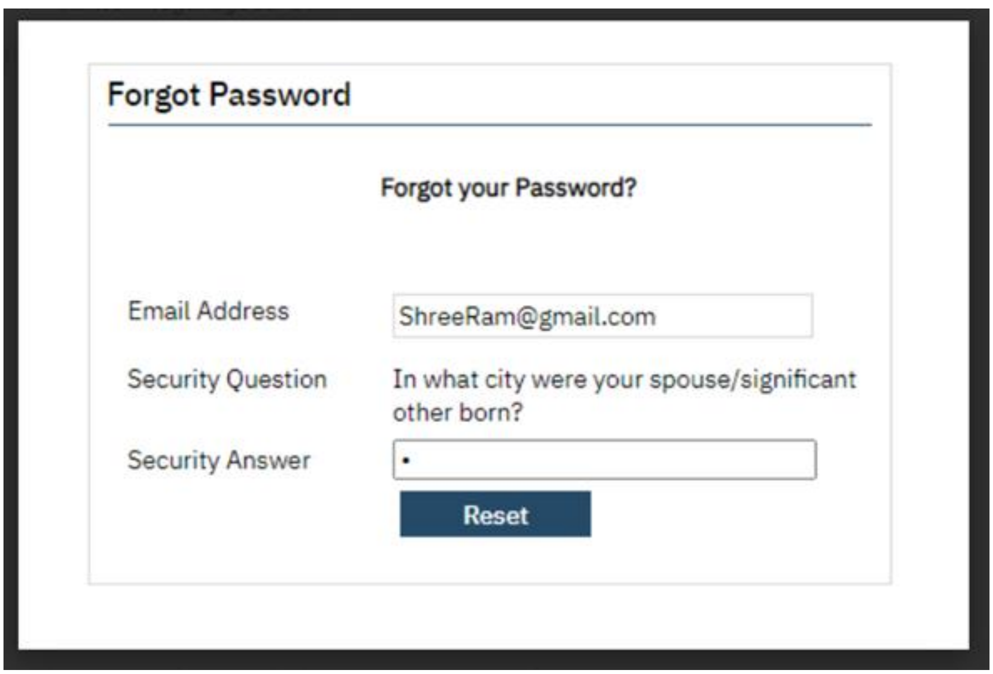
Prerequisites: Create an Active Directory login user in the Staff/Users screen through the **path**: Login to SmartCare application – Navigate to Staff/Users screen – Create new staff with all the details and 'Authentication Type' as 'Active Directory' so that the staff become Active Directory user.

Navigation Path: Login to the application as Active Directory user – Click on 'Forgot your Password?' hyperlink – In the Forgot Password screen enter Email Address and Security Answer – Click on the Reset button.

Functionality 'Before' and 'After' release:

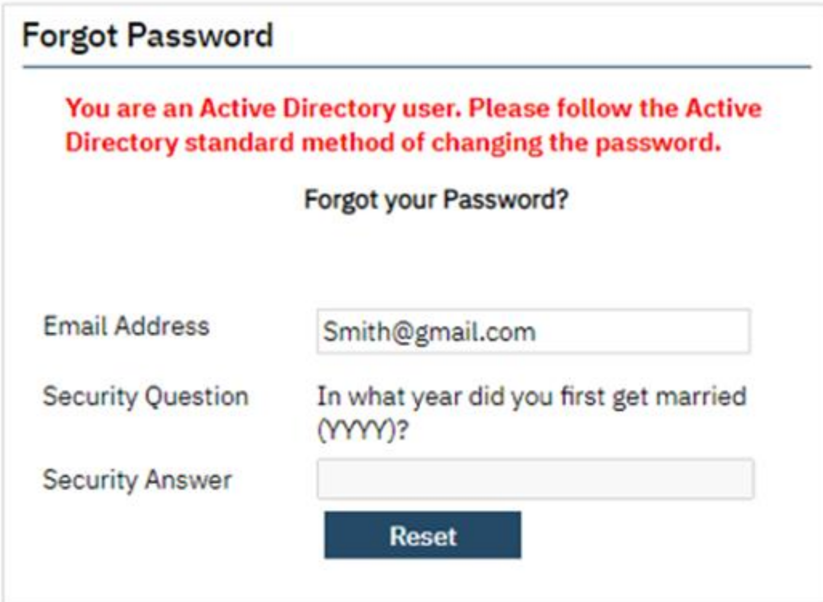
Before this Release, here was the behaviour. When the Active Directory users clicked on the Reset button in the Forgot Password pop up, there was no action performed.

With this release, when the Active Directory user clicks on Forgot your Password? Hyperlink, the Forgot Password pop up will be displayed:



In the Forgot Password pop up, on entering Email Address and Security Answer, and on clicking Reset button, the below mentioned validation message will be displayed:

Validation Message: "You are an Active Directory user. Please follow the Active Directory standard method of changing the password."



Author: Praveen Gangadhara

125. EII # 126343: Changing Organization field's length to 250 and Changing CSP to SSP for Disclosure Screen.

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

Navigation Path 1: 'Client' – Client Information © - 'Contacts' tab – Observe the 'Organization' field accepts 250 characters.

Navigation Path 2: 'Client' – Client Information © - 'Referral' tab – Observe the 'Organization' field accepts 250 characters.

Navigation Path 3: 'Client' – Client Information (Admin) - 'Contacts' tab – Observe the 'Organization' field accepts 250 characters.

Navigation Path 4: 'Client' – Client Information - 'Contacts' tab – Observe the 'Organization' field accepts 250 characters.

Navigation Path 5: 'Client' – Documents – 'Release Of Information' document – Select 'Contact' radio button - Observe the 'Organization' field accepts 250 characters.

Navigation Path 6: 'Client' – Documents – 'Release Of Information' document – Select 'Organization/Provider' button – Open 'Disclosure pop-up - Observe the 'Organization' field accepts 250 characters.

Navigation Path 7: 'Client' – Documents – 'Treatment Team' document – 'Treatment Team Details' Observe the 'Organization' field accepts 250 characters.

Navigation Path 8: My Office– 'Frequent Contacts' – 'Frequent Contact detail' - Observe the 'Organization' field accepts 250 characters.

Navigation Path 9: 'Client' – Documents – 'Registration Document©' – 'Client Contacts' tab - Observe the 'Organization' field displays 250 characters.

Navigation Path 10: 'Administration' – 'Contact/Referral Organizations' -- 'Contact/Referral Organizations' List Page – click on New --'Contact/Referral Organization Details' Page - Observe the 'Organization' field displays 250 characters.

Navigation Path 11: Client – Client Flags – Observe field displays 250 characters.

Navigation Path 12: Client – Document – 'Release Of Information' document – Sign the document by selecting 'Organization/Provider' radio button.

Navigation Path 13: Client -- 'Disclosure/Request' – Click on New --'Disclosure/Request Details' – verify all the validations.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Organization' field's max value was different in the below mentioned screens:

- 'Client Information©' screen: 'Contact' tab - 200 Characters and 'Referral' tab - 100 characters.
- 'Client Information (Admin)' screen: 'Contact' tab - 200 Characters.
- 'Client Information' screen: 'Contact' tab - 200 Characters.
- 'Release Of Information' document: 100 Characters and In Disclosed pop-up - 200 characters.
- 'Treatment Team' screen: 100 Characters.
- 'Frequent Contact' screen: 200 Characters.
- 'Contact/Referral Organization' screen: 200 Characters.
- 'Registration Document ©: 200 Characters.
- 'Client Flags' screen: 100 Characters.

With this release, the 'Organization' field's max value is changed to 250 characters in the below mentioned screens,

- 'Client Information©' screens - 'Contacts' tab and 'Referral' tab.
- 'Client Information (Admin)' screen – 'Contacts' tab.
- 'Client Information' screen – 'Contacts' tab.
- 'Release Of Information' document
- 'Treatment Team Details' screen.
- 'Frequent Contact' screen
- 'Contact/Referral Organization' screen.
- 'Registration Document ©.

- 'Client Flags' screen

In the 'Disclosure/Request' screen, the CSP validations are changed to SSP Validations.

Author: Kiran Tigarimath

126. Core Bugs # 126819: Document Codes: 'Editable After Signature' radio button issue.

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

Prerequisite: 'Administration' - 'Document Codes' - Document Codes Detail' screen.

Navigation Path: 'Client' - 'Documents' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. After signing the selected document, the user was able to edit the document, even though none of the radio buttons (Yes/No) was selected for the 'Editable After Signature' field under 'Document Codes Detail' screen for the selected document.

With this release, the above-mentioned issue is resolved. Now, the user is not able to edit the document, when none of the radio buttons (Yes/No) is selected for the 'Editable After Signature' field under 'Document Codes Detail' screen for the selected document.

Note: While creating a new Document Code, the 'Editable After Signature' field will be selected as 'Yes' by default in the Document Codes detail screen.

Author: Ramya Nagaraj

127. Core Bugs # 126860: Performance issue while logging in to the SmartCare.

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:** On Fire

Prerequisites:

1. Set the staff preferences using the **path:** Go search - Staff /Users - Select any staff- Staff Preferences - Select 'Treatment Team' value from Determine Primary Caseload by drop down.

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

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

Navigation Path: Login to the application.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When a user tried to login to SmartCare, the application performance was poor and the below error message was displayed.

Error Message: Unknown error occurred, please try again later.

With this release, the above-mentioned issue has been resolved. Now, user is able to login to the SmartCare application without any performance issues.

SmartLinks

Reference No	Task No	Description
128	Core Bugs # 126838	The Smartlinks are not visible in the Dark Navigation Theme mode.

Author: Rakesh Naganagoda

128. Core Bugs # 126838: The Smartlinks are not visible in the Dark Navigation Theme mode.

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

Navigation Path: Login to SmartCare – Navigate to 'Change Navigation Theme' option in the user menu -- Change the Theme to dark mode.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the 'Change Navigation Theme' is set to Dark mode in the application, the below mentioned Smartlink icons were not visible.

- Remove from Smartlinks.
- Screen.
- Add to Quicklinks.

The Smartlink icons were visible only when the user hovered over the Smartlink icons.

With this release, the above-mentioned issues have been resolved. Now, the above mentioned Smartlink icons are visible without hovering over them in the Dark mode.

Staff Calendar

Reference No	Task No	Description
~~129~~	~~Core Bugs # 126815~~	~~Primary Care Type dropdown was not displaying values based on sorting order specified in Global Code category 'PCAPPOINTMENTTYPE'.~~

~~**Author:** Aishwarya Bommaklar~~

~~129. Core Bugs # 126815: Primary Care Type dropdown was not displaying values based on sorting order specified in Global Code category 'PCAPPOINTMENTTYPE'.~~

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

~~**Navigation Path 1:** Administration – Global Codes – Select 'PCAPPOINTMENTTYPE' – Click on Category hyperlink – Select the radio button beside the Code ID – Change the Sort Order – Click on Modify button – Click on Save icon.~~

~~**Navigation Path 2:** My Office – My Calendar – Click on the time slot – Select New Primary Care Entry – Select Type drop down.~~

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

~~Before this release, here was the behaviour. The Primary Care Type drop down values in the New Primary Care Entry pop up, were not displayed as per the sort order specified in the Global code category 'PCAPPOINTMENTTYPE'.~~

~~With this release, the above-mentioned issue is resolved. Now the Primary Care Type drop down values are displayed, based on the sorting order specified in the Global Code category 'PCAPPOINTMENTTYPE'.~~

Teds Tracking List

Reference No	Task No	Description
130	Core Bugs # 126952	On signing the 'Admission and Discharge' documents, but in the 'Teds Episode', the Service End Date is not getting updated.

Author: Boovendiran Chinnusamy

130. Core Bugs # 126952: On signing the 'Admission and Discharge' documents, but in the 'Teds Episode', the Service End Date is not getting updated.

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

Navigation Path 1: 'Client' search – search – Select a Client – Go search 'CalOMS Admission'.

Navigation Path 2: 'Client' search – Select a Client – Go search 'CalOMS Standalone Update/Discharge'.

Functionality 'Before' and 'After' release:

Note: This is specific to California State Customers.

Before this release, here was the behaviour. In the 'Teds Episode' - the service end date was not updated correctly on signing the 'Admission and Discharge' documents.

With this release, the above-mentioned issue has been fixed. Now, in the 'Teds Episode' - Service End Date is updating correctly on signing the 'Admission and Discharge' documents.

Time Service entry

Reference No	Task No	Description
131	Core Bugs # 126887	Time Service Entry Slowness.

Author: Suganya Sivakumar

131. Core Bugs # 126887: Time Service Entry Slowness.

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

Navigation Path: Select Client - Go Search - Time Service Entry (Client).

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. There was a performance issue when the user tried to navigate to the Time Service Entry screen.

With this release, the above-mentioned issue has been resolved. Now, the Time Service Entry screen loads quickly without any delay.

Widgets

Reference No	Task No	Description
132	Core Bugs # 126733	Where only two of the three signed 'PHQ A/PHQ 9' documents are showing in the custom widget after making edits to any one of the documents.
133	Core Bugs # 126840	Summary Widget is not displayed properly when zoomed in the Patient Portal.
134	Core Bugs # 127013	Performance issue: Tracking Widget Time Out.

Author: Rakesh Naganagoda

132. Core Bugs # 126733: Where only two of the three signed 'PHQ A/PHQ 9' documents are showing in the custom widget after making edits to any one of the documents.

Prerequisites: Create a widgets for PHQ 9 document for both Graph and Table.

Navigation Path 1: Login to SmartCare – 'Client' search – 'PHQ 9' Document – Create 3 PHQ 9 document with different Effective Date.

Navigation Path 2: 'Client' search – 'Client Dashboard' Screen – Observe the PHQ 9 document in the widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Only two of the three signed 'PHQ A/PHQ 9' documents were showing in the custom widget after making edits to any one of the documents.

With the release, this issue has been resolved. Now, all three recently signed documents are displayed in the custom widget.

Author: Sunil Belagali

133. Core Bugs # 126840: Summary Widget is not displayed properly when zoomed in the Patient Portal.

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

Navigation Path: Login with Patient Portal account -- My Dashboard -- 'Summary' widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'My Dashboard' screen, the 'Summary' widget was cutting off at the bottom and was not displayed properly when zoomed in.

With this release, the above-mentioned issue is resolved. Now, the vertical scrollbar is added to the 'Summary' widget to scroll inside the widget when zoomed in.

Author: Girish Jayanna

134. Core Bugs # 127013: Performance issue: Tracking Widget Time Out.

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

Navigation Path: Dashboard (My Office) -- 'Tracking' widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The data was not displayed in the Tracking widget; instead, it displayed the Timeout Expired error message.

With this release, the above-mentioned issue has been resolved. Now, the Tracking widget is displaying the data properly.

Glossary of System Configuration Keys, Global Codes, Recodes

System Configuration Keys

23. 'ShowNewFlagIconBelowClientViewingButton'

40. AllowFutureEffectiveDateInDocuments

54. DisplayCDAGSectionInStaffDetails

54. EnableClinicalDataAccessGrouping

121. ShowOnlySelectedFieldsInEMNoteReport

127. DisplayCDAGSectionInStaffDetails

127. EnableClinicalDataAccessGrouping

Global Codes

43. ENCOUNTERTYPE

82. LETTERTEMPLATE

90. Order Type

129. PCAPPOINTMENTTYPE

Recodes

14. CascadePayerChargeErrors

14. CascadeChargeToLowestPriorityPayer

28. GenerateReqForOrderType

33. ShowHideAdditionalColumnsonClientSearchPopUp

33. ShowAdditionalColumnsOnClientSearchPopup