

**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)

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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	<del>EII # 126291</del>	<del>Implemented the 'Case Information(C)' section – 'Case Initiation Date' field under 'Client Information(C)' screen.</del>	<del>Client Information-C</del>
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	<del>EII # 126815</del>	<del>Custom hook has been added to the files to display a custom field tab in the 'Agency/Program Discharge' document.</del>	<del>Documents</del>
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	<del>EII # 125780</del>	<del>A new 'Medication' radio button is added in the 'Health Maintenance Template' screen.</del>	<del>Primary Care</del>
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
125	EII # 126343	Changing Organization field's length to 250 and Changing CSP to SSP for Disclosure Screen.	SmartCare Improvements

## TASKS SUMMARY – 'NEW FUNCTIONALITY' RELATED (5)

Sl. No	Task No	Summary	Module Name
1	EII # 126792	Compliance Batch Details Page: Implementation of Download PDSRF button.	274 PDSRF
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

## TASKS SUMMARY – 'DEFECT FIXES' (108)

Sl. No	Task No	Summary	Module Name
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.	Activity Tracker
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	<del>Core Bugs #126769</del>	<del>National Outcome Measures (NOMS) screen: The incorrect tab is enabled and an Invalid validation message is displayed.</del>	<del>Documents</del>
50	<del>Core Bugs #126784</del>	<del>The vitals from the Flowsheet is not showing in the NOMS (National Outcome Measure) document based on the date</del>	<del>Documents</del>
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	<del>Core Bugs #126897</del>	<del>PC: Medical Progress Note: The user is unable to navigate back to the 'Medical Progress Note' screen from some other screen.</del>	<del>Documents</del>
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	<del>Core Bugs #126900</del>	<del>Error is displayed during the execution of the FC discharge support plan validation script.</del>	<del>Foster Care</del>
60	Core Bugs #126849	Client MAR and Group MAR pages not displayed in full screen	Group MAR
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 eRequisition 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
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	Interface
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	<del>The screen set in the client Page Preference is not displayed on click of Client ID in Primary Care Appointments pop-up.</del>	<del>Primary Care</del>
97	Core Bugs #126867	<del>Medical Progress Note: The System Tags have weird behavior where text color changes to the wrong color.</del>	<del>Primary Care</del>
98	Core Bugs #126880	<del>PC: Not all problems showing in the Problems widget on Client Summary Primary Care</del>	<del>Primary Care</del>
99	Core Bugs #126910	<del>The Prenatal Care tag details were not displayed correctly in the Medical Progress Note.</del>	<del>Primary Care Progress Note</del>
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
108	Core Bugs #126724	Rx: Warning message displayed while running Rx app in Visual Studio	Rx Application
109	Core Bugs #126772	Improvement to min and max dose calculations	Rx Application
110	Core Bugs #126837	Medication records were not saving in database properly for existing non ordered medication.	Rx Application
111	Core Bugs #126908	ssp_ValidateLoginToken does not check if the TwoFactorDevice record is marked as record deleted	Rx Application
112	Core Bugs #126792	Service Note Red Ink Error Message "Input string was not in a correct format."	SAML (Single Sign On)
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	<del>Primary Care Type dropdown was not displaying values based on sorting order specified in Global Code category 'PCAPPOINTMENTTYPE'</del>	<del>Staff Calendar</del>
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

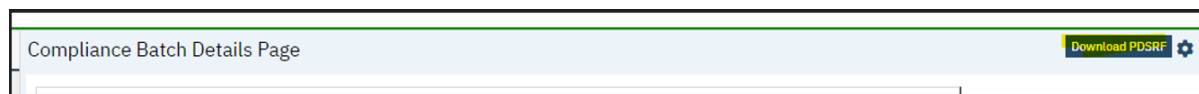
**Navigation Path:** 'My Office' – 'Compliance Batch List Page' – 'Batch Type-274' – 'Compliance Batch Details Page' – 'Download PDSRF' button.

**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.

	A	B	C	D	E
1	County Name	Contact Name	Contact Email	Contact Phone	
2	<del>C. J. H. S. L. SERIAL</del>	<del>Santhosh Gowda</del>	<del>santhoshgowda51@gmail.com</del>	<del>954-123-1234</del>	
3					
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CONTACT
SUBMISSIONS
+

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
	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		
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													

- **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.

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**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.

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## 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.

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## 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.

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**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.

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## 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.

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## 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.

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## 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.

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## 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.

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**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.

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**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.

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**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.

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**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.

- 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".

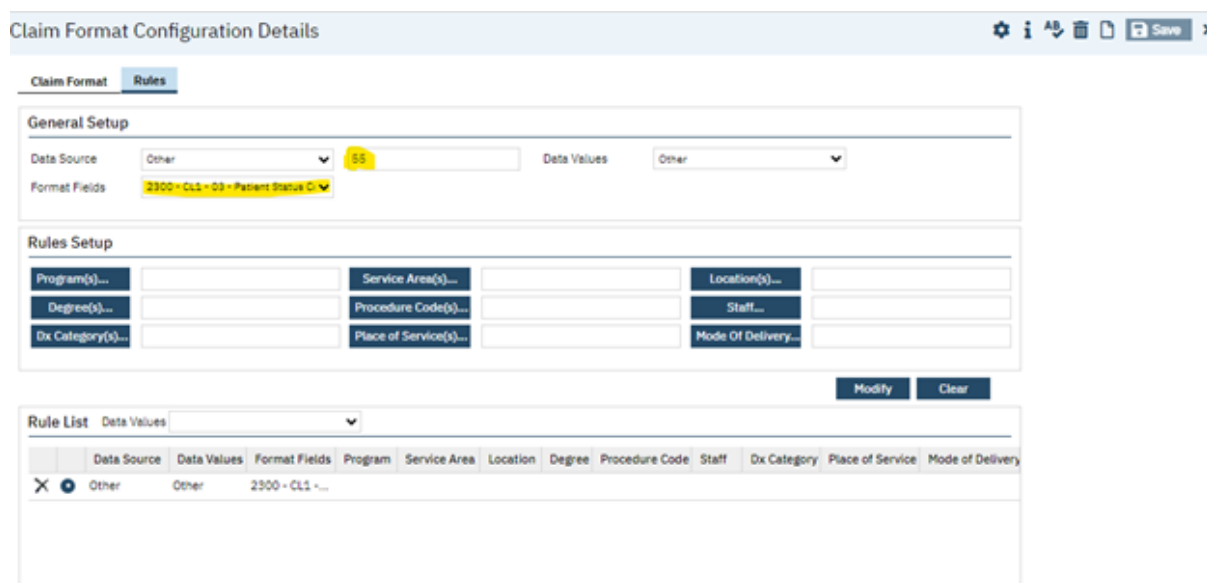
**Navigation Path:** 'My Office' – 'Charges/Claims' – select the required Charge ID and click on the 'E-Claim' button – click on the 'Process Now' button in the 'Claim Processing' pop-up – click on 'Create Claim File' button – click on 'Save As' button in the 'Claim File Creation' pop-up screen.

### 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.



Claim Format Configuration Details

Claim Format Rules

General Setup

Data Source: Other Data Values: Other

Format Fields: 2300 - CL1 - 03 - Patient Status Code

Rules Setup

Program(s) Service Area(s) Location(s) Degree(s) Procedure Code(s) Staff Dx Category(s) Place of Service(s) Mode of Delivery(s)

Modify Clear

Rule List Data Values

	Data Source	Data Values	Format Fields	Program	Service Area	Location	Degree	Procedure Code	Staff	Dx Category	Place of Service	Mode of Delivery
X	Other	Other	2300 - CL1 - 03 - Patient Status Code									



**Output on 837 Inst claim file.**

Batch Id	Format	Display As	File Name	Created Correctly
7602	HIPAA 837 Institution...	Plan Overr...	7602-Plan Override-HIPAA	<input checked="" type="checkbox"/>

DMGIDB\*19910904\*P  
REF\*SV\*468896543  
NM1\*PR\*2\*PLAN OVERRIDE\*\*\*\*\*PI\*24342  
N3\*7TH MAIN  
N4\*NEW YORK CITY\*NY\*70101  
CUM\*4714-12787\*120\*\*\*A\*\*A\*\*Y\*1  
DTP\*434\*RD8\*20230812-20230812  
DTB\*435\*DT\*202308101601  
6408\*188\*18  
AMT\*F3\*120  
REF\*EA\*4714  
HC\*ABK\*F260\*U  
HC\*AB3\*F260  
HC\*BE\*A3\*120  
HC\*DR\*DRG243566  
NM1\*71\*1\*TG\*SAHANA\*\*\*\*\*JC\*1234567890  
PR\*PAT\*99C\*TESTTB23  
DEENBNA SEATS

Balance Total: \$0.00

Process	Batch	Proced Name
6408	7602	Override

**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.

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**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.

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## 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.

Client Information(C)

General	Demographics	Contacts	Release of Information Log	Client Episodes	Hospitalization	Primary care	Financial		
SA Demographics	Referral	Special Rates	Family	Aliases	External Referral	Timeliness	Reporting	Interfaces	<b>Foster Care</b>

MAT Custom Fields

**Case Information**

Case Initiation Date:  

**Preferences**

Client Preferences/Interests:

<input type="checkbox"/> Soccer	<input checked="" type="checkbox"/> Music	<input type="checkbox"/> Model UN
<input checked="" type="checkbox"/> Student Government	<input checked="" type="checkbox"/> Skateboarding	

**Educational Needs**

Enrolled in School:

School Program Type:

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

The screenshot shows the 'Pharmacy Orders (107)' interface. The 'Display Processed' checkbox is selected, and the 'Apply Filter' button is highlighted. The table below shows the filtered results.

Deny	Process	Client Name (ID)	Order Date	Order Prescribed By	Order Medication	Order Instructions	Fill Date	Fill Pharmacy	Fill Medication	Fill
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Visna (4225)					11/15/2023 12:...	Shollenberger Pharmacy	amoxapline 50 mg tablet	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Visna (4225)		Smith,Killer	Bardia Silicone Ct Latex ...	Take 1 tablet a day	11/18/2023 12:...	Shollenberger Pharmacy	Bardia Silicone Ct Latex ...	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Sat 123 (4162)					12/5/2023 9:05...	Q51 PHARMA	DILTIAZEM 120MG TAB...	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Sat 123 (4162)	12/05/2023	David,Miller	Abilify 10 mg tablet	Take 4 tablets a day	12/5/2023 12:0...	Q51 PHARMA	Abilify 10 mg tablet	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Sat 123 (4162)					12/5/2023 8:10...	Q51 PHARMA	AMOXICILLIN 500MG C...	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Problem (4733)					1/3/2024 12:00...	Shollenberger Pharmacy	morphine in 0.9 % sodiu...	Take
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Test_Problem (4733)					1/3/2024 12:00...	Shollenberger Pharmacy	morphine in 0.9 % sodiu...	Take

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

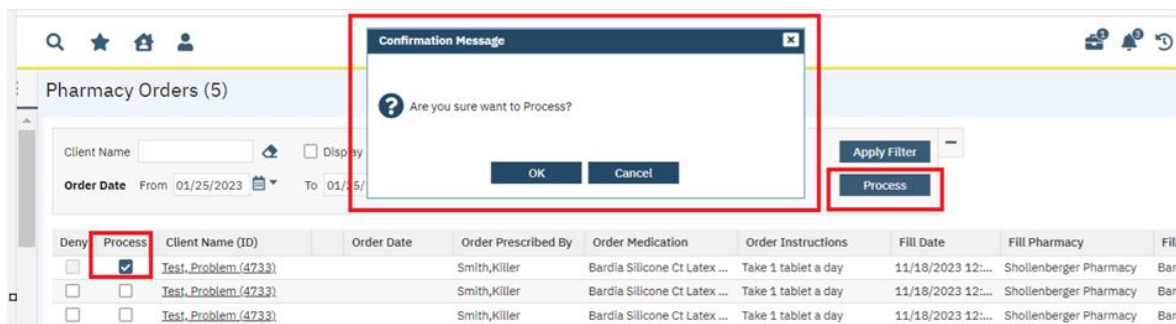
The screenshot shows the 'Pharmacy Orders (70)' interface. The 'Display Denied' checkbox is selected, and the 'Apply Filter' button is highlighted. The table below shows the filtered results.

Deny	Process	Client Name (ID)	Order Date	Order Prescribed By	Order Medication	Order Instructions	Fill Date	Fill Pharmacy	Fill Medication	Fill
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_zzz (1535)					11/23/2023 12:...	Shollenberger Pharmacy	menthol 7 mg lozenges	Take
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Visna (4225)					11/15/2023 12:...	Shollenberger Pharmacy	amoxapline 50 mg tablet	Take
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Problem (4733)		Smith,Killer	Bardia Silicone Ct Latex ...	Take 1 tablet a day	11/18/2023 12:...	Shollenberger Pharmacy	Bardia Silicone Ct Latex ...	Take
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Problem (4733)					1/3/2024 12:00...	Shollenberger Pharmacy	morphine in 0.9 % sodiu...	Take
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Problem (4733)					1/3/2024 12:00...	Shollenberger Pharmacy	morphine in 0.9 % sodiu...	Take
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Test_Problem (4733)					1/3/2024 12:00...	Shollenberger Pharmacy	morphine in 0.9 % sodiu...	Take

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.

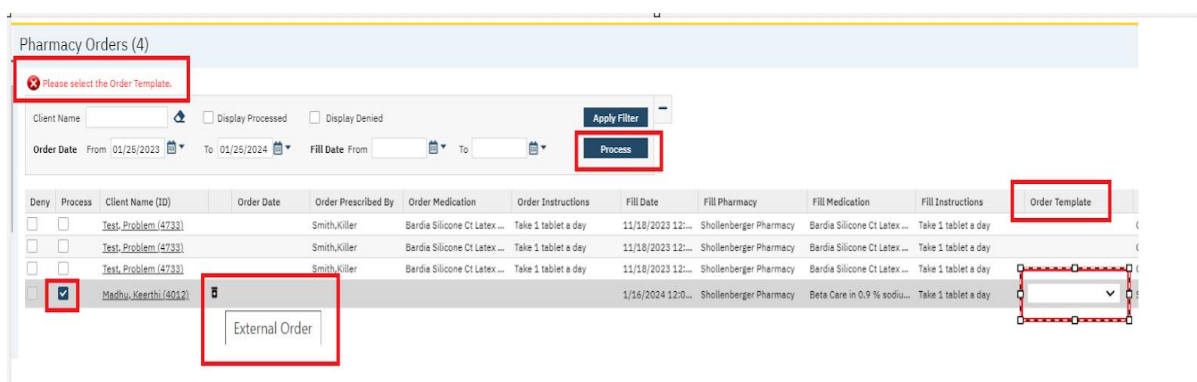
On click of 'OK' button, the records are processed.

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.

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**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 to 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.

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## 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,

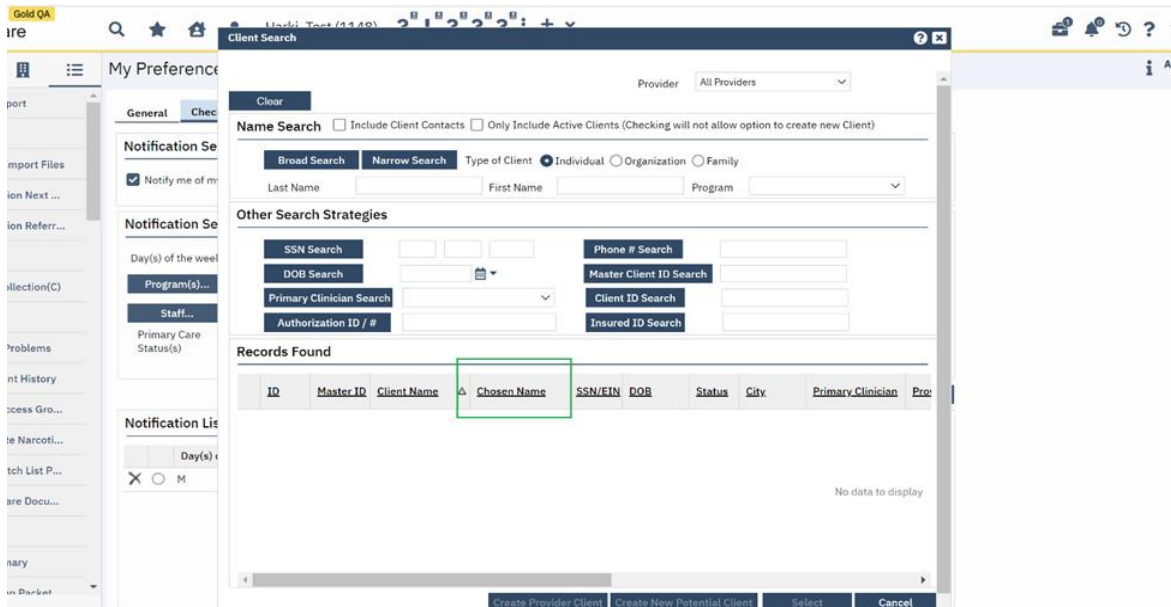
1. 'ShowHideAdditionalColumnsonClientSearchPopUp' Recode Category has been renamed to 'ShowAdditionalColumnsOnClientSearchPopup'. This recode category is used to show/hide additional columns like 'Primary Insured ID', Primary Plan, Sex, Race, Marital Status, Primary Language, Alias, Chosen Name on Client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

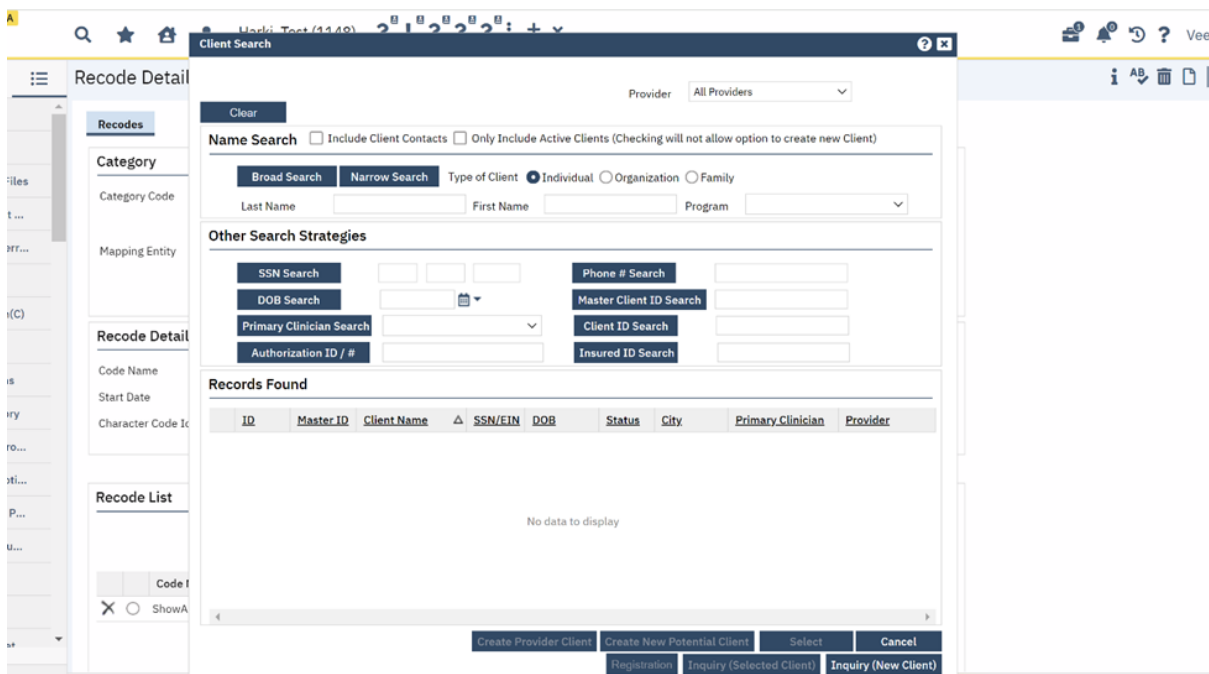
**Screenshot when Chosen Name column is displayed:**



The screenshot shows the 'Client Search' popup. The 'Records Found' table has the following columns: ID, Master ID, Client Name, Chosen Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The 'Chosen Name' column is highlighted with a green box.

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 :



The screenshot shows the 'Recode Detail' popup. The 'Records Found' table has the following columns: ID, Master ID, Client Name, SSN/EIN, DOB, Status, City, Primary Clinician, and Provider. The '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:** Ram ya 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

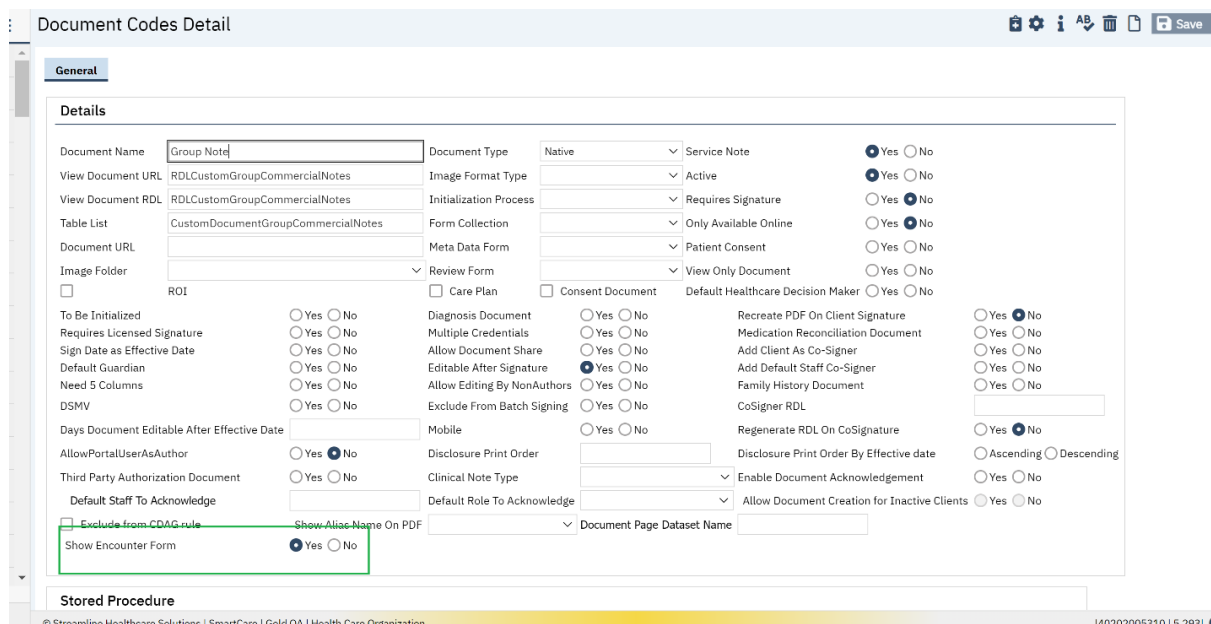
**39. EII # 125928: Added 'Show Encounter Form' field in Document Codes Detail screen.**

**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.



The screenshot shows the 'Document Codes Detail' screen with the 'Details' tab selected. The 'Show Encounter Form' field is highlighted with a green box, indicating it is a new addition. The field has a 'Yes' radio button selected and a 'No' radio button. Other fields include 'Document Name' (Group Note), 'Document Type' (Native), 'Service Note' (Yes), 'View Document URL' (RDLCustomGroupCommercialNotes), 'Image Format Type' (Active), 'View Document RDL' (RDLCustomGroupCommercialNotes), 'Initialization Process' (Requires Signature), 'Table List' (CustomDocumentGroupCommercialNotes), 'Form Collection' (Only Available Online), 'Document URL' (Patient Consent), 'Image Folder' (Review Form), 'Meta Data Form' (View Only Document), 'ROI' (Care Plan), 'Consent Document' (Default Healthcare Decision Maker), 'To Be Initialized' (Yes), 'Requires Licensed Signature' (Yes), 'Sign Date as Effective Date' (Yes), 'Default Guardian' (Yes), 'Need 5 Columns' (Yes), 'DSMV' (Yes), 'Days Document Editable After Effective Date' (Yes), 'Allow Portal User As Author' (Yes), 'Third Party Authorization Document' (Yes), 'Default Staff To Acknowledge' (Yes), 'Exclude from CDAG rule' (Yes), 'Show Alias Name On PDF' (Yes), 'Mobile' (Yes), 'Disclosure Print Order' (Yes), 'Clinical Note Type' (Yes), 'Default Role To Acknowledge' (Yes), 'Recreate PDF On Client Signature' (Yes), 'Medication Reconciliation Document' (Yes), 'Add Client As Co-Signer' (Yes), 'Add Default Staff Co-Signer' (Yes), 'Family History Document' (Yes), 'CoSigner RDL' (Yes), 'Regenerate RDL On CoSignature' (Yes), 'Disclosure Print Order By Effective date' (Ascending), 'Enable Document Acknowledgement' (Yes), 'Allow Document Creation for Inactive Clients' (Yes), and 'Document Page Dataset Name'.

## 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	<del>Core Bugs # 126769</del>	<del>National Outcome Measures(NOMS) screen: The incorrect tab is enabled and an Invalid validation message is displayed.</del>
50	<del>Core Bugs # 126784</del>	<del>The vitals from the Flowsheet is not showing in the NOMS (National Outcome Measure) document based on the date</del>
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	<del>PC: Medical Progress Note: The user is unable to navigate back to the 'Medical Progress Note' screen from some other screen.</del>
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".

PHQ9

Effective 02/08/2024

Status In Progress

Author David, Miller

01/18/2024

Complete

PHQ9

Consent For Treatment ACT

PHQ9

☒ Declined to Participate

Performed At\*

Next

Over the last two weeks, how often have you been bothered by any of the following problems?

1. Little interest or pleasure in doing things

2. Feeling down, depressed, or hopeless

3. Trouble falling or staying asleep, or sleeping too much

4. Feeling tired or having little energy

Validations

Document- EffectiveDate- 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.

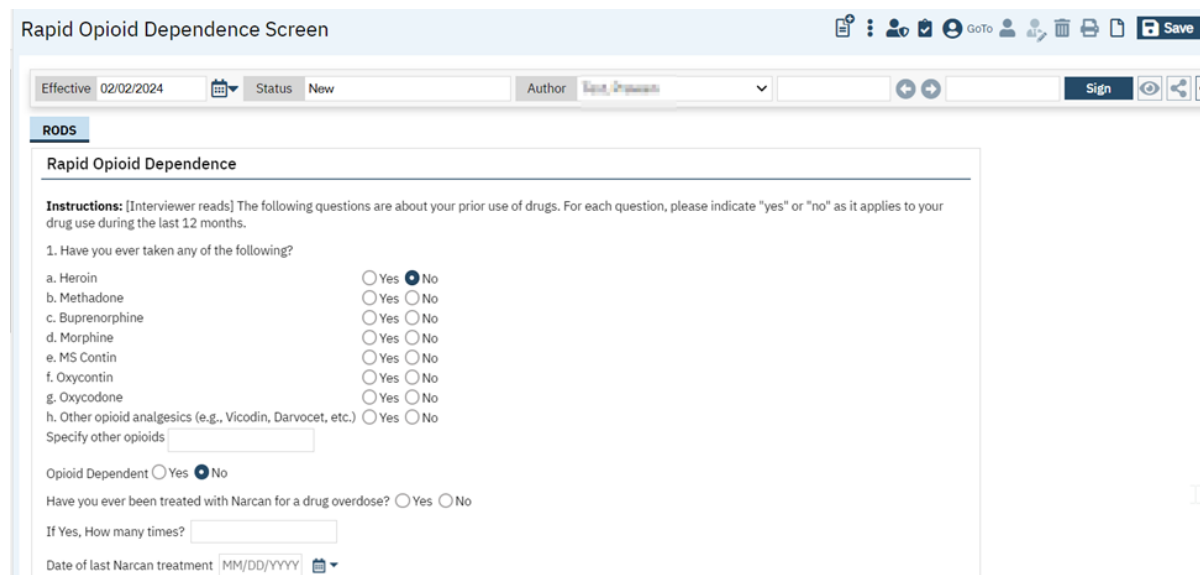
**Functionality 'Before' and 'After' release:**

**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:



The screenshot shows the 'Rapid Opioid Dependence Screen' form. At the top, there is a header bar with the title 'Rapid Opioid Dependence Screen' and a toolbar with icons for navigation and actions. Below the header, there is a form area with a tab labeled 'RODS'. The main section is titled 'Rapid Opioid Dependence'. It contains instructions for the interviewer to read and a series of questions about drug use. The questions are listed with radio button options for 'Yes' and 'No'. The first question is '1. Have you ever taken any of the following?'. The options are: a. Heroin, b. Methadone, c. Buprenorphine, d. Morphine, e. MS Contin, f. Oxycontin, g. Oxycodone, h. Other opioid analgesics (e.g., Vicodin, Darvocet, etc.), and a text field for 'Specify other opioids'. The 'No' option is selected for the first question. Below the questions, there is a section for 'Opioid Dependent' with a radio button for 'Yes' and 'No'. The 'No' option is selected. There is also a question 'Have you ever been treated with Narcan for a drug overdose?' with 'Yes' and 'No' radio buttons. The 'No' option is selected. Below this, there is a question 'If Yes, How many times?' with a text field. At the bottom, there is a question 'Date of last Narcan treatment' with a date picker set to MM/DD/YYYY.

**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.

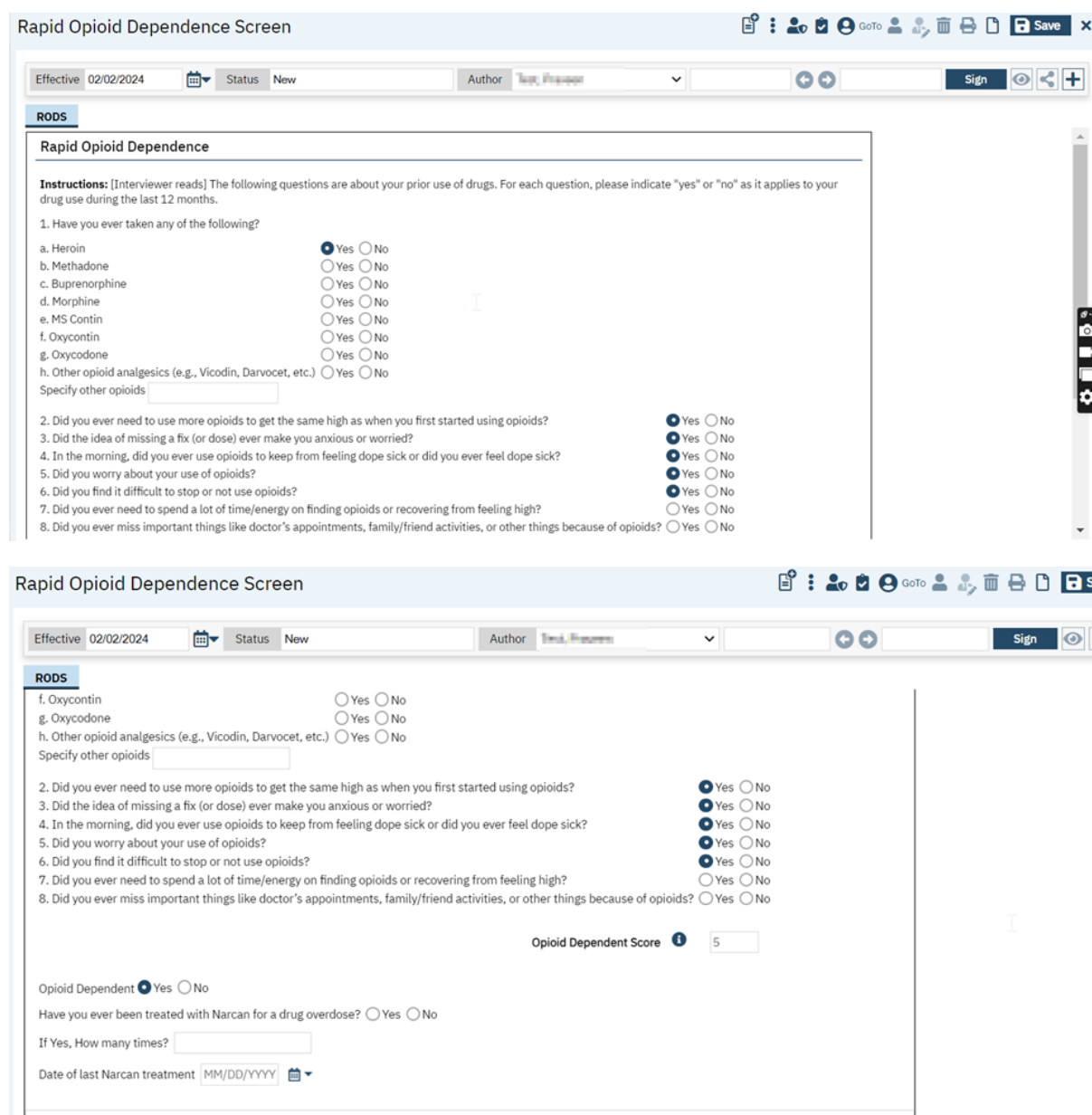
**8. Did you ever miss important things like doctor's appointments, family/friend activities, or other things because of opioids?':** This is a radio button field, consisting of 'Yes' and 'No' as values.

**'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:



The screenshot displays the 'Rapid Opioid Dependence Screen' form. The form includes a header with a title bar and a toolbar with icons for navigation and actions. Below the header, there is a section for 'Effective' date (02/02/2024), 'Status' (New), and 'Author' (Test, Program). The main content area is titled 'RODS' and contains a list of questions with radio button options for 'Yes' and 'No'. The questions are:

- Have you ever taken any of the following?
  - a. Heroin
  - b. Methadone
  - c. Buprenorphine
  - d. Morphine
  - e. MS Contin
  - f. Oxycontin
  - g. Oxycodone
  - h. Other opioid analgesics (e.g., Vicodin, Darvocet, etc.)
- Did you ever need to use more opioids to get the same high as when you first started using opioids?
- Did the idea of missing a fix (or dose) ever make you anxious or worried?
- In the morning, did you ever use opioids to keep from feeling dope sick or did you ever feel dope sick?
- Did you worry about your use of opioids?
- Did you find it difficult to stop or not use opioids?
- Did you ever need to spend a lot of time/energy on finding opioids or recovering from feeling high?
- Did you ever miss important things like doctor's appointments, family/friend activities, or other things because of opioids?

Below the questions, there is a section for 'Opioid Dependent Score' with a value of 5. The form also includes a section for 'Opioid Dependent' with a value of 1, and a section for 'Have you ever been treated with Narcan for a drug overdose?' with a value of 0. The form is titled 'Rapid Opioid Dependence Screen' and includes a toolbar with icons for navigation and actions.

Validation messages will display as follows:

Validations
RODS - Rapid Opioid Dependence - Heroin is required
RODS - Rapid Opioid Dependence - Methadone is required
RODS - Rapid Opioid Dependence - Buprenorphine is required
RODS - Rapid Opioid Dependence - Morphine is required
RODS - Rapid Opioid Dependence - MS Contin is required
RODS - Rapid Opioid Dependence - Oxycontin is required
RODS - Rapid Opioid Dependence - Oxycodone is required
RODS - Rapid Opioid Dependence - Other opioid analgesics is required

Validations
RODS - Rapid Opioid Dependence - Specify other opioids is required
RODS - Rapid Opioid Dependence - Did you ever need to use more opioids to get the same high as when you first started using opioids is required
RODS - Rapid Opioid Dependence - Did the idea of missing a fix (or dose) ever make you anxious or worried is required
RODS - Rapid Opioid Dependence - In the morning, did you ever use opioids to keep from feeling dope sick or did you ever feel dope sick is required
RODS - Rapid Opioid Dependence - Did you worry about your use of opioids is required
RODS - Rapid Opioid Dependence - Did you find it difficult to stop or not use opioids is required
RODS - Rapid Opioid Dependence - Did you ever need to spend a lot of time/energy on finding opioids or recovering from feeling high is required
RODS - Rapid Opioid Dependence - Did you ever miss important things like doctor's appointments, family/friend activities, or other things because of opioids is required

Validations
RODS - Rapid Opioid Dependence - Have you ever been treated with Narcan for a drug overdose is required

Validations
RODS - Rapid Opioid Dependence - If Yes, How many times is required
RODS - Rapid Opioid Dependence - Date of last Narcan treatment is required

**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:

Client Orders (1)

Custom Date From To All Statuses Assigned To Ordering Physician Apply Filter

All Types Order Name Original Order ID All Clinic/Locations

Unacknowledge Orders (1)

OrderId	Type	Name	Frequency	Start Date	End Date	Status	Sub-Status	Ordering Physician	Clinic/Location	Assigned Staff	Pi
3778	Activity	Test Prabakar	Monthly Test	02/01/2024 12:00 ...	02/02/2024 12:00 ...	Discontinued		Ng, Archana			

Order Review

Test Prabakar

Frequency: Monthly Test

Start: 02/01/2024 12:00 AM

End: 02/02/2024 12:00 AM

Preference ☒ Discontinued

Priority: Routine

Staff ☐ Role ☒ Super User / Test User

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'.

Client Orders (1)

Custom Date From To All Statuses Assigned To Ordering Physician Apply Filter

All Types Order Name Original Order ID All Clinic/Locations

OrderId	Type	Name	Frequency	Start Date	End Date	Status	Sub-Status	Ordering Physician	Clinic/Location	Assigned Staff	Pi
3791	Activity	test1111	PRN Activity	02/01/2024 12:00 ...	02/03/2024 11:59 ...	Active		Ng, Archana			

**Goal Plan Document:****Activity details:**

Goal Plan

Effective: 02/15/2024 Status: In Progress Author: Test, Archana 01/12/2024 Sign

**Skill Development Area**

Skill Development Area #1 Skill Development Area: Ambulating End Date: [Calendar Icon]

Long Term Goal: goal5

**Need #1.01**

Need: need

Initiation Date: 02/01/2024 Target Date: [Calendar Icon]

End Date: 02/01/2024 Completed Status: Achieved

**Activity #1.01.01**

Order Name: Order\_Plan123 Staff: [Radio Button] Role: PsychiatristTest [Up Arrow Icon]

Start Date: 02/01/2024 Target Date: [Calendar Icon]

End Date: 02/15/2024 Program: acchu program1-12/0...

Frequency: test PRN ACT Priority: Now

Order Comments: test- comments

Status/Skill Level: status - comments

Comments: test124

Review Status: Revised

Review Comments: comments

**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'.

The screenshot displays the 'Goal Plan' interface. At the top, there's a header bar with 'Effective' date (02/01/2024), 'Status' (In Progress), 'Author' (Ng, Archana), and '01/31/2024'. Below this is a 'Skill Development Area' section. A dropdown menu for 'Skill Development Area' is highlighted with a red box and shows 'Communication'. The form contains several input fields and dropdowns for tracking a skill development activity, including dates, status, and comments.

**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

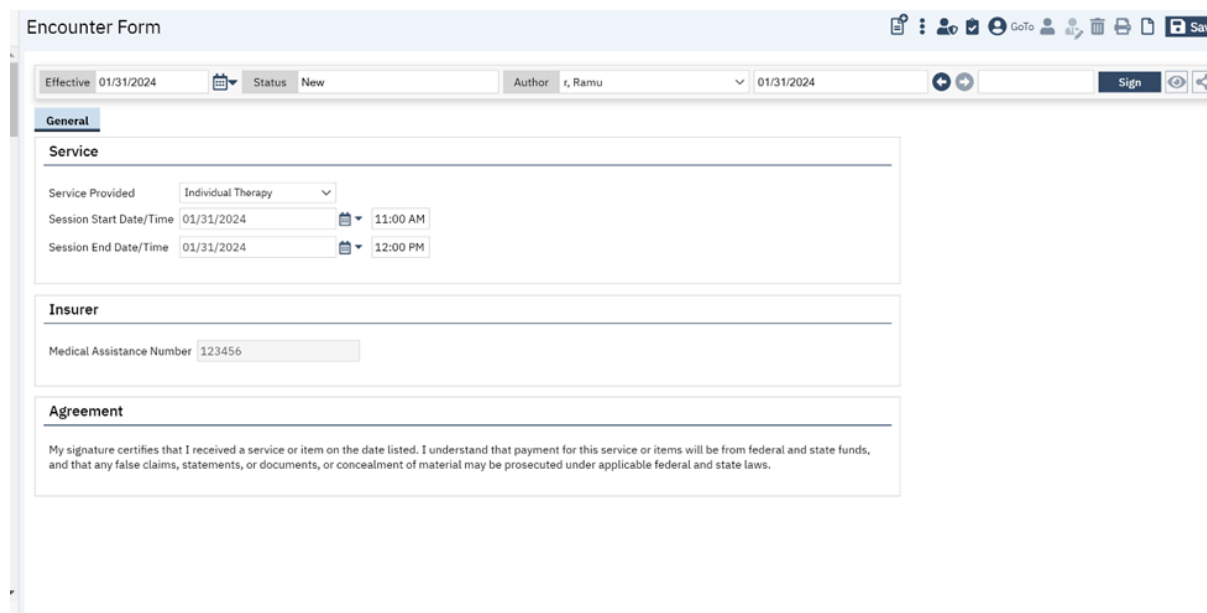
**Navigation Path:** – Client' search – 'Documents' – 'Encounter Form' document.

#### **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 'EncounterForm' 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.

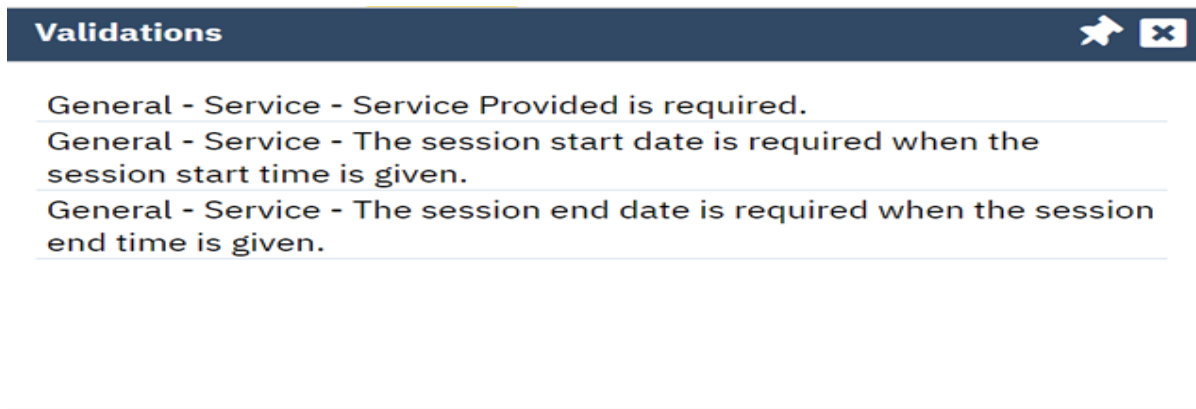
**'Insurer' Section:** In this section, the below-mentioned fields will be displayed:

- **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.

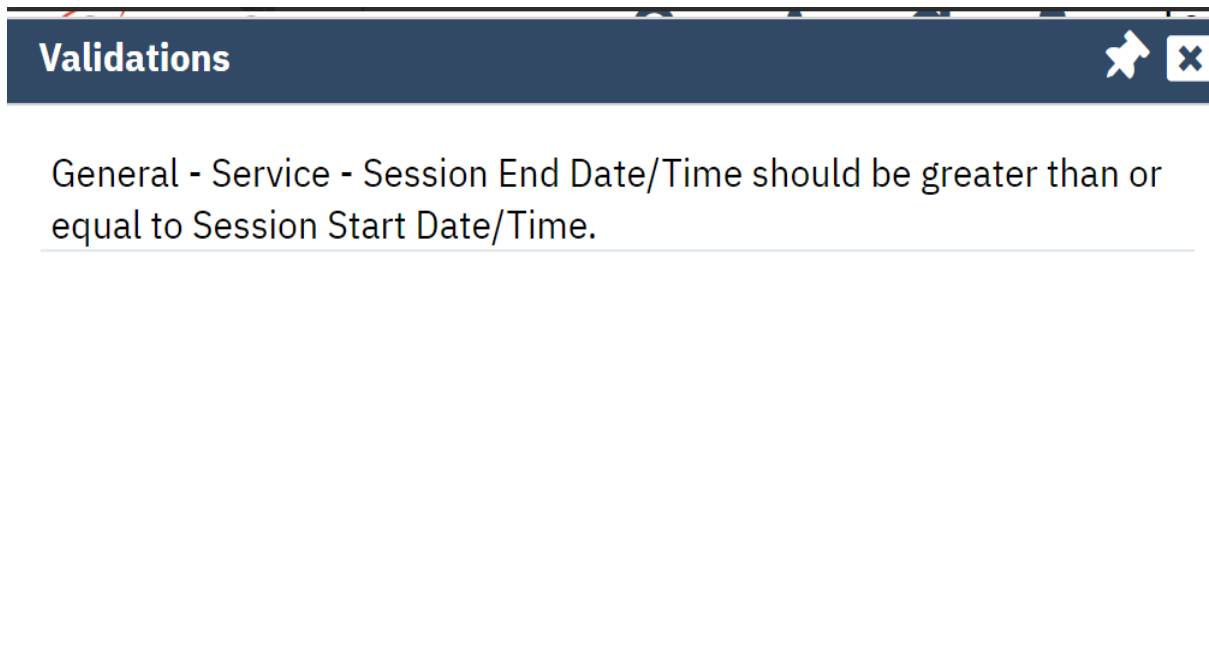
**'Agreement' Section:** In this section, the below-mentioned text Label will be displayed. Since this is DFA, the users can change the label on their own.

**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.

Encounter Form

Effective 01/31/2024 Status Signed Author Huggi, Santosh

Document

PdfBytesHandler.axd 1 / 1 73%

Client Name: Clientv Test DOB: 07/01/2000 Medicaid: NA

**SmartCare#Demo**

**Encounter Form**

Client Name	Test, Clientv	Client ID:	2105224
DOB:	07/01/2000	Effective Date:	01/31/2024

Service  
Service Provided Individual Therapy

Session Start Date/Time 1/31/2024 9:00:00 AM

Session End Date/Time 1/31/2024 10:00:00 AM

Insurer  
Medical Assistance Number

Agreement  
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.

Clinician: Santosh Huggi, OTHER Organization, DEA Signature Date: 01/31/2024

**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:**

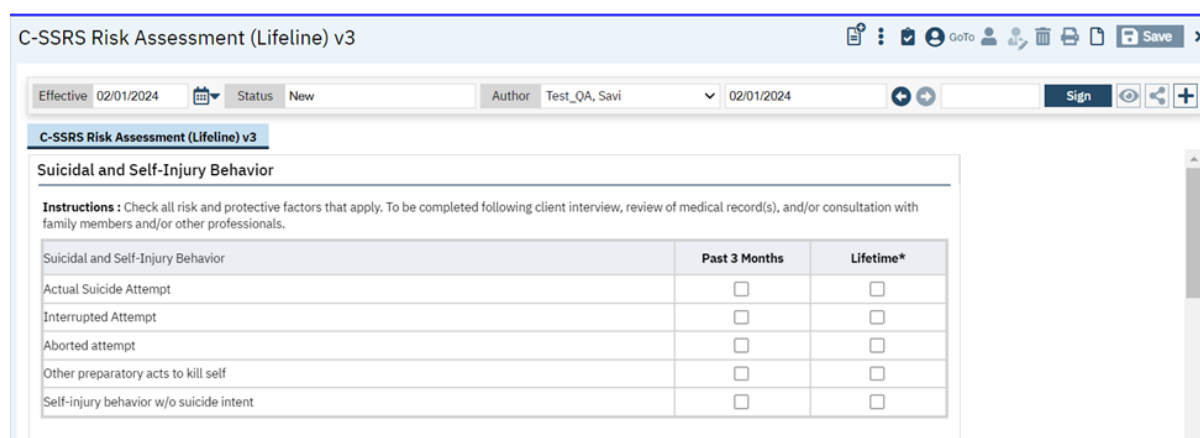


**Purpose:** The C-SSRS Risk Assessment is intended to help establish a person's immediate risk of suicide and is used in acute care settings.

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:

- Screen Name – C-SSRS Adult Assessment
- Screen Name – C-SSRS Adult Since Last Visit
- Screen Name – C-SSRS Children's Baseline Screening
- 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.



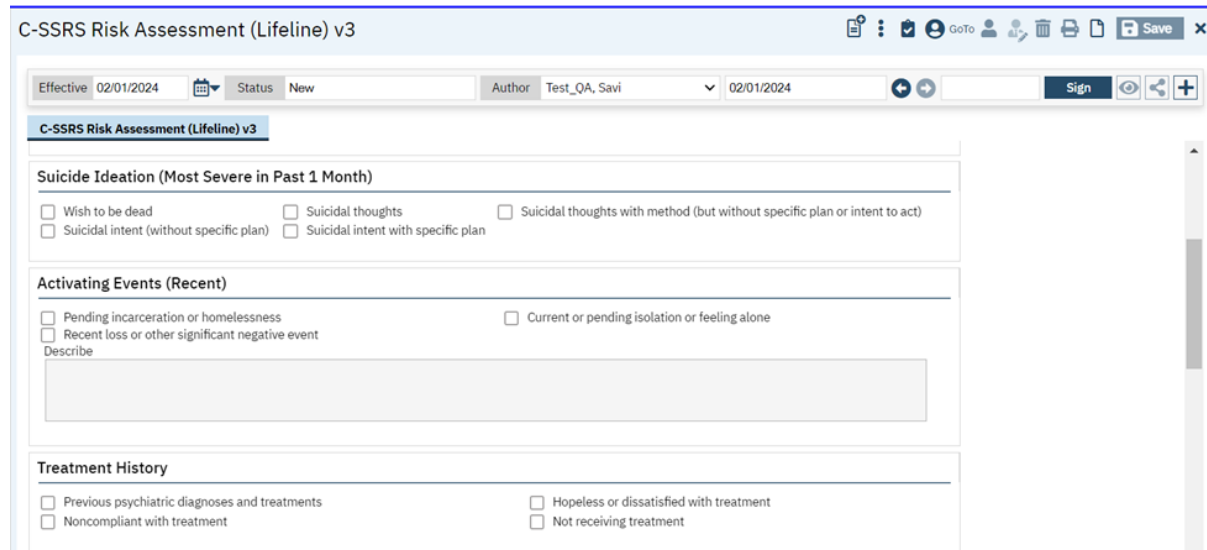
Suicidal and Self-Injury Behavior	Past 3 Months	Lifetime*
Actual Suicide Attempt	<input type="checkbox"/>	<input type="checkbox"/>
Interrupted Attempt	<input type="checkbox"/>	<input type="checkbox"/>
Aborted attempt	<input type="checkbox"/>	<input type="checkbox"/>
Other preparatory acts to kill self	<input type="checkbox"/>	<input type="checkbox"/>
Self-injury behavior w/o suicide intent	<input type="checkbox"/>	<input type="checkbox"/>

**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

C-SSRS Risk Assessment (Lifeline) v3

Effective 02/01/2024

Status New

Author Test\_QA, Savi

02/01/2024

Sign

Save

C-SSRS Risk Assessment (Lifeline) v3

Other Risk Factors

Clinical Status (Recent)

☐ Hopelessness
☐ Major depressive episode
☐ Highly impulsive behavior
☐ Perceived burden on family or others
☐ Method for suicide available (gun, pills, etc.)
☐ Family history of suicide (lifetime)

☐ Helplessness\*
☐ Mixed affective episode
☐ Substance abuse or dependence
☐ Homicidal ideation
☐ Refuses or feels unable to agree to safety plan
☐ Chronic physical pain or other acute medical problem (AIDS, COPD, cancer, etc.)

☐ Feeling Trapped\*
☐ Command hallucinations to hurt self
☐ Agitation or severe anxiety
☐ Aggressive behavior towards others
☐ Sexual abuse (lifetime)

Protective Factors (Recent)

☐ Identifies reasons for living
☐ Fear of death or dying due to pain and suffering
☐ Engaged with Phone Worker \*

☐ Responsibility to family or others; living with family
☐ Belief that suicide is immoral, high spirituality

☐ Supportive social network or family
☐ Engaged in work or school

**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 \*

C-SSRS Risk Assessment (Lifeline) v3

Effective: 02/01/2024 Status: New Author: Test\_QA, Savi 02/01/2024 Sign Save

**C-SSRS Risk Assessment (Lifeline) v3**

**Protective Factors (Recent)**

☐ 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**

**Suicide, Self-Injury, Aggressive Behavior Description**

Describe any suicidal, self-injury, or aggressive behavior. Include Dates (to/from if known)

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).

**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

C-SSRS Adult Assessment

Effective: 02/02/2024 Status: New Author: Test\_QA, Savi Sign Save

General **C-SSRS Risk Assessment (Lifeline) v3**

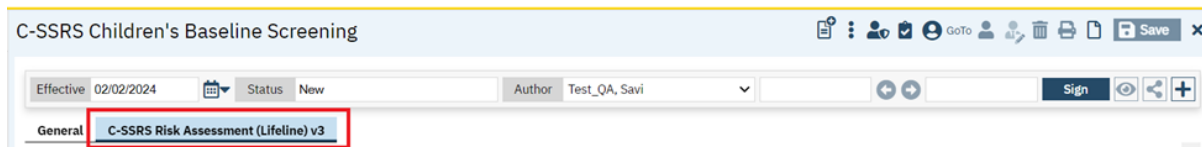
b) C-SSRS Adult Since Last Visit

C-SSRS Adult Since Last Visit

Effective: 02/02/2024 Status: New Author: Test\_QA, Savi Sign Save

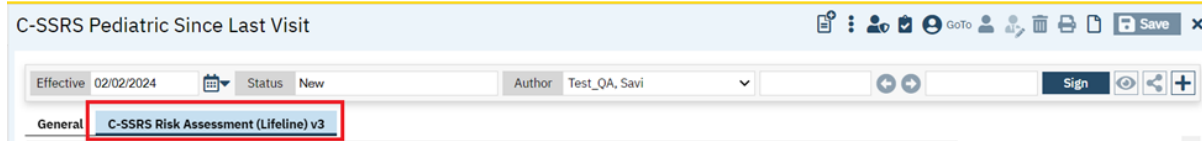
General **C-SSRS Risk Assessment (Lifeline) v3**

### c) C-SSRS Children's Baseline Screening



The screenshot shows the 'C-SSRS Children's Baseline Screening' form. At the top, there is a header bar with the title and a toolbar with icons for print, share, and save. Below the header, there is a form section with fields for 'Effective' (02/02/2024), 'Status' (New), 'Author' (Test\_QA, Savi), and a 'Sign' button. A red box highlights the 'General' tab, which contains the text 'C-SSRS Risk Assessment (Lifeline) v3'.

### d) C-SSRS Pediatric Since Last Visit



The screenshot shows the 'C-SSRS Pediatric Since Last Visit' form. It has a similar layout to the previous form, with a header bar and a form section. The 'Effective' field is 02/02/2024, 'Status' is New, and 'Author' is Test\_QA, Savi. A red box highlights the 'General' tab, which contains the text 'C-SSRS Risk Assessment (Lifeline) v3'.

**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.

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**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.

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**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.

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**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.

Procedure Code Details

General

Rates/ Billing Codes

Programs/ Credentials

Add-On Procedure Codes

CQM Configurations

Bundle Codes

Reporting

Code Information

Name

test nir procedure

Display As

test nir procedure

Active

Allow Decimals (2 Places)

Entered As

Minutes

Rules

This code is not billable. Therefore this code NEVER has a rate associated with it.

Client charges for this code should be written off.

Require Signed Note for Non-Billable Service.

This code does not require that a staff be specified for service.

Do not show this service on the staff calendar.

This code specifies a 'face-to-face' contact with client.

This is a group code (more than one client can be present).

End date must equal start date on service entry.

Must have a signed note before creating a charge.

Require Time In/ Time Out in Smartcare.

Does not require billing diagnosis.

This is a bundled rate procedure code.

Exclude from sending Appointment Reminders

Service Completion Lag Days

Associate Note

CPST Note

Allow using Note from a different Service.

Require Client Signature on the Encounter Form

Reporting Information

External Code 1

External Source 1

External Code 2

External Source 2

MU Code

MU Source

Credit Percentage

100 %

Code Categories

Category1

Category2

Category3

Rate Information

Current Standard Rate

\$100.0000 Range 1 To 60

Minutes

Modifiers

Allow Modifiers On Service

Add Modifiers...

Modifier Code

Default On Service

**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.

Psychiatric Note

GoTo

Effective 01/31/2024
Status New
Author Test, Niru
01/31/2024

Service
Note
Billing Diagnosis
Resource
Warnings
Encounter Form

Insurer
Medical Assistance Number 212121

Agreement
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

Sign
Preview

**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.

Group Service Detail

**Service** **Note** **Other**

**Group**

Group: t99  
Date: 01/31/2024  
Location: 01 & 02 Austria Bangalore  
Place of Service:   
Status: Scheduled

Group Comment:   
Specific Location:

**Staff** **Add Staff...**

Staff Name	Unit	Type	Start	End
Test, Aishu	30	Minutes		

**Clients** ☐ Show Clients With Errors

Test, niru (2105254)  
Test, Rock (2105321)

**Encounter Form**

Encounter Number: 212121

I understand that I received a service or item on the date listed. I understand that payment for this service will be from federal and state funds, and that any false claims, statement, or documents, or other material may be prosecuted under applicable federal and state laws

Signature: ☐ Signature Exempt

Review

**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 eRequisition 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 eRequisition 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.

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## 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:**

PCP Letter

Effective 02/06/2024 Status New Author Kunjilana, Chaitra 02/02/2024

Source [Icons]

B I [Icons] Styles Normal Font Size A [Icons]

\*\*\*CONFIDENTIAL\*\*\*

05/31/2023 [Date Of Service]

2, Rajesh [Provider Name]

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

Dear 2, Rajesh, [Provider Name]

On 05/31/2023, Chaitra Testing, 1425, Feb 9 2000 12:00AM, was seen by 2, Rajesh at Gold QA for Services.  
[Date of Service] [Client Name] [Client ID] [Client DOB] [Provider Name] [Organization Name]

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

[Billing Diagnosis]

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

[Current Medications]

[Organization Name]

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

body p

- 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:**

**PCP Letter****Client Information**

<b>Client Name</b>	Testing, Chaithra	<b>Client ID</b>	1425
<b>DOB</b>	02/09/2000	<b>Effective Date</b>	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.



The screenshot shows a web form titled 'Category'. It contains several input fields and checkboxes. The 'Category Code' field is set to 'LETTERTEMPLATE'. The 'Category Name' field is also set to 'LETTERTEMPLATE'. There are two checkboxes: 'Active' (checked) and 'User Defined Category' (unchecked). Below these, there is a list of permissions: 'Allowed to add/modify/delete codes' (checked and disabled), 'Allowed to modify code names' (checked), 'Allowed to modify sort order' (checked), and 'Has Subcodes' (unchecked). The 'Allowed to add/modify/delete codes' checkbox is circled in blue.

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.

Global Code Details

Category

Category Code LETTERTEMPLATE

Category Name LETTERTEMPLATE

☒ Active ☐ User Defined Category

☒ Allowed to add/modify/delete codes

☒ Allowed to modify code names

☒ Allowed to modify sort order

☐ Has Subcodes

Description

Organization/Affiliate Setup

☒ Primary Driven
☒ Allow Addition By Affiliate
☒ Allow Deactivation By Affiliate

## 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.

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## Messages

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

**Author:** Ram ya 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.

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**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.

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## 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.

Order Details

Order Details

Order Setup

Order Type
Nutrition

Type

Health Data Template

Alternate Name1

Procedure Code

Order Name

Brand Name

Icon
Search and Select

☒ Active

☐ Cannot Modify Order Name

☐ SUD

- 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.

Order Details

Priorities

Priorities

▼

Add

	Default	Priority
No data to display		

Schedules

Schedules

▼

Add

	Default	Schedule
No data to display		

Frequencies

Frequencies

▼

Add

New

	Default	Display Name	Frequencies	Dispense Times
No data to display				

Options

Order can be completed	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Order can be pended	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Order rationale	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Order Comments	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Whiteboard Observations	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Diagnosis Required	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Whiteboard Legal	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Whiteboard Level	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Billable	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Add Order to MAR	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Permissioned?	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Sensitive Order	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Quick Order	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Display Program?	<input type="radio"/> Yes	<input checked="" type="radio"/> No

Diagnoses

▼

Add

	Default	DSM 5/ ICD 10	ICD/ DSM Description
No data to display			

Questions

✕

Question 1

///

Answer Type

▼

☐ Required

Global Code Category

▼

i

Laboratories

▼

Question Code

///

Show question at the time of

☐ Administration

☒ Ordering

☐ Both

[Add Additional Questions](#)

Acknowledgement

Role

▼

☐ Acknowledge

☐ Acknowledgement Required

☐ Pending Release

☐ Signature Required

Add

- 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.

Client Order

Effective 01/31/2024

Status Signed

Author David, Miller

01/18/2024

Sign

Document

PdfBytesHandler.axd

1 / 2 | - 100% +

Streamline Healthcare Solutions, L.L.C.

Client Information

Client Name: Manu, Trainee

Client ID: 4148

DOB: 03/29/1999

Effective Date: 01/31/2024

Nutrition : snainutrition\_protocol

Entered By: David, Miller

Order Status: Active

Order Name: snainutrition\_protocol

Priority: PRN

Schedule/Start: 01/31/2024 02:00PM

Ordering Physician: David, Miller

Order Mode: Electronic

Frequency: Evening 6 PM

Nutrition SubType: Replacement Protocol

End Date: 02/03/2024 11:59PM

**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.

Test, ClientV (4318)

Miller Dav

Client Order

Effective 01/22/2024

Status Signed

Author David, Miller

01/22/2024

Sign

Document

PdfBytesHandler.axd

1 / 1 | - 100% + |

Streamline  
Healthcare Solutions, L.L.C.

Client Information

Client Name: Test, ClientV

Client ID: 4318

DOB: 05/01/2000

Effective Date: 01/22/2024

Active Medication: Antacid (Antacid - v)

Client Order Id: 7725

Entered By: David, Miller

Order Status: Active

Medication: ANTACID (ANTACID - V) , 200-200-20mg/5 mL, Suspension, Oral 1 mg 4 times per day

Schedule/Start: 02/12/2024 01:00PM

Day Supply: 3

Ordering Physician: David, Miller

Order Mode: Electronic

End Date: 02/14/2024 11:59PM

### 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.

[illegible]

**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.

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## 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.

Health Maintenance Template

Group Name

X O testShivGroup 19th Jan

Health Maintenance Action Criteria

☐ Labs/Vitals
☐ Procedures
☐ Radiology
☒ Medication

Order Name

Do Once in

Do Every

Do between ages

☐ Count Procedures

Min.Interval

For

times

To

every

☐ Include all ages

Select Ages...

Insert

Clear

Type of Action	Order	Description
X O Medication	Calamine Medicated	Do once in 1 Day(s)

**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.~~

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## 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 Tigarith

## 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).



New primary Care Entry

OKCancelDelete

Primary Care

Client...Acacianna, RowenaDOB:03/29/1968

Provider Name

Type

Start Date02/06/2024

End Date02/06/2024

☐ Client Was Present Other Person(s) Present

Comment

Program

Duration

Start Time

End Time

Location

Status

Cancel Reason

Exam Room

Mode Of Delivery

Status

Time

No data to display

My Calendar

Single-Staff ViewNandan, Raghu Nurse Practitioner10 Minutes IntervalsSingle StaffShowing 1-1/1Apply Filter

TodayDayWeekMonthRefreshOct 29 2023 - Dec 2

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	Nov 1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29			

11:34 PM Client Margaret Adela, Devereaux(#1115) - Test QA Procedure  
8:00 AM Client Margaret Adela, Dev  
Time: Nov 24 (Fri) 03:00 AM - 03:30 AM  
Event: Client Margaret Adela, Devereaux(#1115) - Test QA Procedure 1 (Service)  
Location: Location\_New1

Patient Summary

Patient Search...Consent HistoryMedication HistoryNew OrderAdd Medication

Acacianna, Rowena (4604), DOB/AGE: 3/29/1968 (55), Sex: F

Preferred Pharmacy

Patient OverviewReconciliationEligibilityMedication History

Client Eligibility Information (Transaction Set: 0001)

Patient:  
First Name: RowenaMiddle Name: RBLast Name: AcaciannaSuffix:  
Gender: FemaleDOB: 03/29/1968  
Patient Id: XYR%725J73R5Information Contact:  
Patient Address: 2798 Pampal St NE  
Patient City: AlbuquerquePatient State: NMPatient Zip: 87112  
Additional Id: Patient-Account-NumberPatient Account Number  
Additional Id: R6-21334Identity Card Number

Benefits:  
Coverage  
Insurance Plan  
Group  
Service Date  
Message(s)

Allergies/Intolerances/Failed Trials

Show All

Show: ☐ All ☒ Active Only

☐ No Known Allergies

Add Allergy...

Print List...Change OrderRe-orderComplete OrderPatient ConsentGeneral Medication ConsentRun ReportReal-Time Med HistoryPDRP

☐ Patient has no prescribed medications

**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).

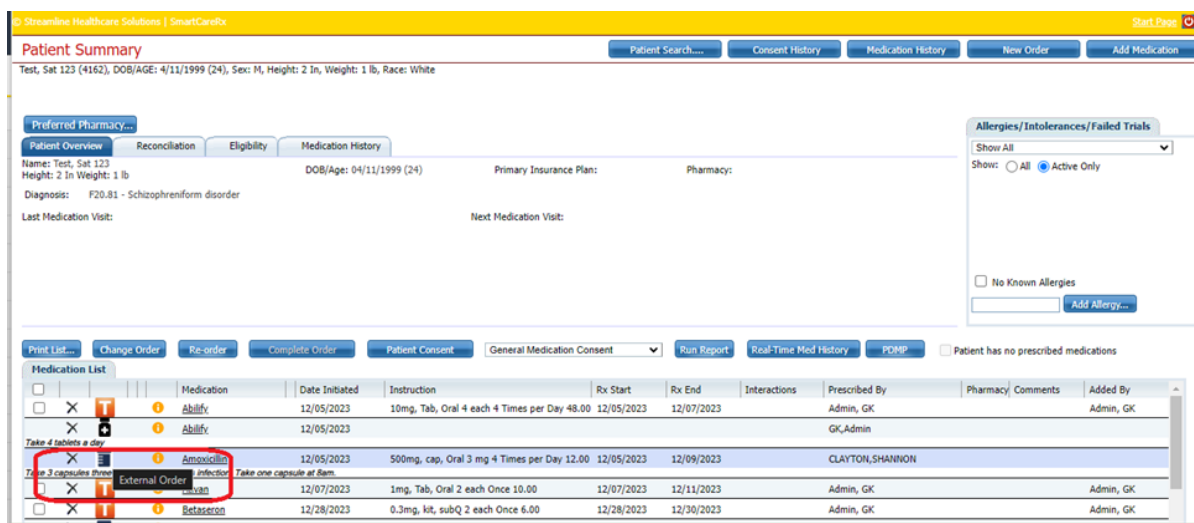
**Navigation Path 1:** Login to SmartCare Application – Select a client – Medication Management (Client)— Patient Summary screen (Rx Application) – Hover the mouse over the External Order icon.

**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 screenshot displays the 'Patient Summary' screen for a patient named 'Test, Sat 123'. The 'Medication History' tab is selected, showing a list of medications. A red box highlights the 'External Order' icon in the medication list, which is a small icon with a red 'X' and a red 'T'.

Medication	Date Initiated	Instruction	Rx Start	Rx End	Interactions	Prescribed By	Pharmacy	Comments	Added By
Abilify	12/05/2023	10mg, Tab, Oral 4 each 4 Times per Day 48.00	12/05/2023	12/07/2023		Admin, GK	GK, Admin		Admin, GK
Amoxicillin	12/05/2023	500mg, cap, Oral 3 mg 4 Times per Day 12.00	12/05/2023	12/09/2023		CLAYTON, SHANNON			
External Order	12/07/2023	1mg, Tab, Oral 2 each Once 10.00	12/07/2023	12/11/2023		Admin, GK			Admin, GK
Benetaron	12/28/2023	0.3mg, kit, subQ 2 each Once 6.00	12/28/2023	12/30/2023		Admin, GK			Admin, GK

The below screenshot refers to the tool tip of External Order icon for the external ordered medication in the **View Medication History screen**.

Streamline Healthcare Solutions | SmartCareRx










View Medication History

Test, Sat 123 (4162), DOB/AGE: 4/11/1999 (24), Sex: M, Height: 2 In, Weight: 1 lb, Race: White

Date: Rx Date Start Date: 01/29/2023 End Date: Apply Filter

Medication: Medications Prescriber: Prescribers Discontinue Reason: Select Discontinue Reason

Print List Expand/Collapse All

Medication	Order Date	Instruction	Disp. Qty	Rx Start	Rx End	Prescribed By	Pharmacy	Comments	Order Status	Order Date	Added By	Discontinued By	Discontinue Reason
 Cefixime HCl	12/05/2023	120mg, Tab, Oral 1 mg Daily	365.00	12/05/2023	12/04/2024	David, Miller			New	01/02/2024			
 External Order	01/02/2024	10mg/5 mL, soln, oral 20 ml Once	140.00	01/02/2024	01/08/2024	Admin, GK			New	01/02/2024	Admin, GK		
 Ibuprofen	12/28/2023	0.3mg, kit, subQ 2 each Once	6.00	12/28/2023	12/30/2023	Admin, GK			New	12/28/2023	Admin, GK		
 Ativan	12/07/2023	1mg, Tab, Oral 2 each Once	10.00	12/07/2023	12/11/2023	Admin, GK			New	12/07/2023	Admin, GK		
 Amoxicillin	12/05/2023	500mg, cap, Oral 3 mg 4 Times per Day	12.00	12/05/2023	12/09/2023	CLAYTON, SHANNON			New	12/05/2023			
 Abilify	12/05/2023	10mg, Tab, Oral 4 each 4 Times per Day	48.00	12/05/2023	12/07/2023	Admin, GK			New	12/05/2023	Admin, GK		
 Test N/Go Test	11/08/2023	Strp, Misc 1 units	0.00	11/08/2023		Sat, Test			New	11/07/2023	Sat, Test		
 Tadalafil	11/06/2023	240mg, CpER, Oral 0 each	0.00	11/06/2023		001, Client			New	11/07/2023	Sat, Test		
 Testosterone (Bulk)	11/07/2023	Powd, Misc 0 units Weekly	0.00	11/07/2023		1092, Test3			New	11/07/2023	Sat, Test		

**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.

**New Medication Order**

Smith, Will (1291), DOB/AGE: 1/7/2000 (24), Sex: M, Height: 70 In, Weight: 162 lb, Race: American Indian and

**Order**

☐ Send Directly to Pharmacy

Pharmacy:

Prescriber: Malipati, Manjunath DEA #: AD1111119 Order Date: 02/01/2024 Prescribing Location: Office 1 Verbal Order Read Back: ☐

**Medication** ☐ Permit Changes By Other Users

Drug: DOLOGEN Dx/Purpose:  Active Coverage:  Dispense as Written: ☐

Instruction Text: fivef Desired Outcome: wefivefive Comment: fivefivefive Include On Prescription: ☐

Titrate:  Recommended Min/Max Units: 1 EA - 6 EA

Strength	Dose	Unit	Directions	Rx Start	Days	Dispense Qty	Potency Unit	Refills	Sample	Stock	Rx End
2.650mg, Tab, Oral	3	each	Morning	02/01/2024	30	45		0	0	0	03/01/2024

More Steps

Please Select Days Of Week for the selected Direction.

Medication List Formulary

**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:**

Smart, Iam (2105144)  Lkg Test 

Scanned Medical Record Detail 

Client (Medical Records)  2105144 Smart, Iam Effective 02/01/2024 





Record Type  Lab Orders Description 



Image Details

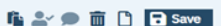
Whole Page Zoom In Zoom Out Delete Reload Reload All Insert Page(s) Append Page(s) Edit Image... Page 1 of 2



1 

2 

8.5

Smart, Iam (2105144)  Lkg Test 

Upload File Detail 

Client (Medical Records)  2105144 Smart, Iam Effective 02/01/2024 




Record Type  Labs Description 

Image Details

Delete File Reload File Reload All Insert File Append File Page 1 Of 1

1 

Supervision User Guide

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
    Create an Organizational Hierarchy ..... 1




2. Open the Scanned/Uploaded document from the Documents/My Documents List page and add a Co-Signer to it.

### Documents List page:

Smart, Iam (2105144)  Lkg Test 

Documents (3)  Create Document... 









All Authors...  All Documents  Completed  Due In X days  Other   Apply Filter 





Custom Date  ☐ Include errored documents From 02/01/2024  To 02/01/2024  ☐ Include External Documents







Document/Description	Group Name	Effective ▾	Status	Ver.	Due Date	Author	To Co-Sign	Others to Sign	Shared	Associated Docum
Misc ( ABC Note )		02/01/2024	Completed	1		Sood, Manu			No	<a href="#">Add</a>
Labs		02/01/2024	Completed	1		Test, Lkg			Yes	<a href="#">Add</a>
Lab Orders		02/01/2024	Completed	1		Test, Lkg			Yes	<a href="#">Add</a>




### My documents List page:



Smart, Iam (2105144)     Lkg Test    









My Documents (2)    











All Clients  All Documents  Completed  Due in x days  Other  







Custom Date  From 02/01/2024  To 02/01/2024  ☐ Include External Documents



Client	Document/Description	Group Name	Effective	Status	Ver.	Due Date	Staff to Sign	Author	Others to Sign	Associated Documents
Smart, Iam (2105144)	Labs		02/01/2024	Completed	1			Test, Lkg		Add
Smart, Iam (2105144)	Lab Orders		02/01/2024	Completed	1			Test, Lkg		Add

### Adding a Cosigner:

Smart, Iam (2105144)     Lkg Test    

Labs          

Effective 02/01/2024  Status Signed Author Test, Lkg     

Other Versions  Signed By 



1. 02/01/2024, Lkg Tes...

Signer







Add Signer(s)...


☒ X Adair, Leo

☒ X Smart, Iam









 











Document











PdfBytesHandler.axd 1 / 26 | 70%      



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.

SmartCare     Lkg Test    




Labs          

SignaturePage          

Smart, Iam is signing the Labs

Smart, Iam 02/08/2024 10:59 AM

☐ Password ☒ Signature Pad ☐ Mouse/Touchpad ☐ Client Signed Paper Document ☐ Verbally Agreed Over Phone



  







Signer

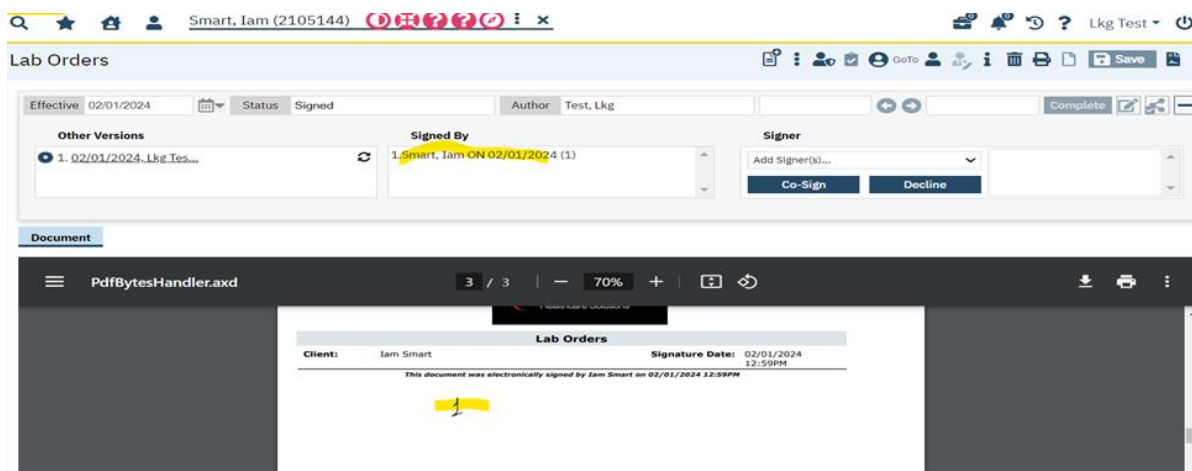
Add Signer(s)...

☐ X Lazar, Theresa

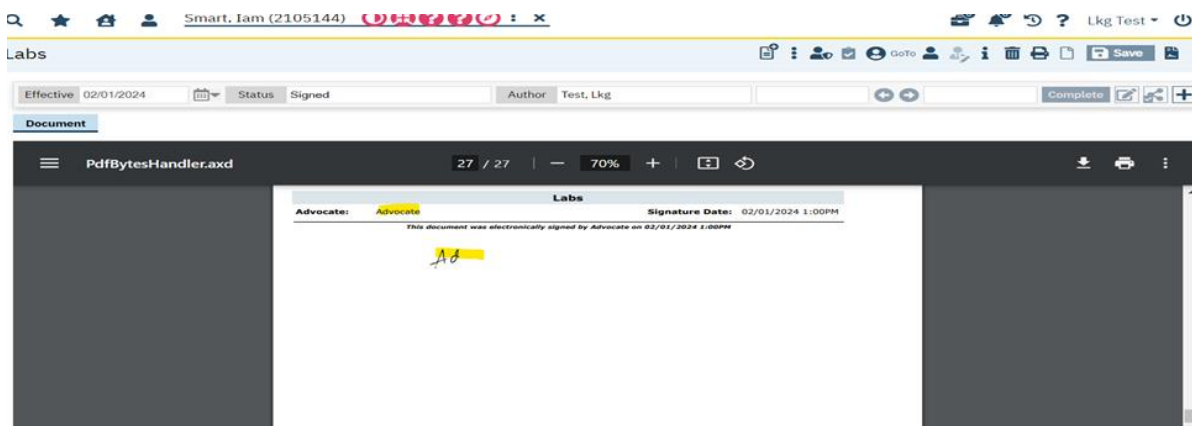
☒ X Smart, Iam

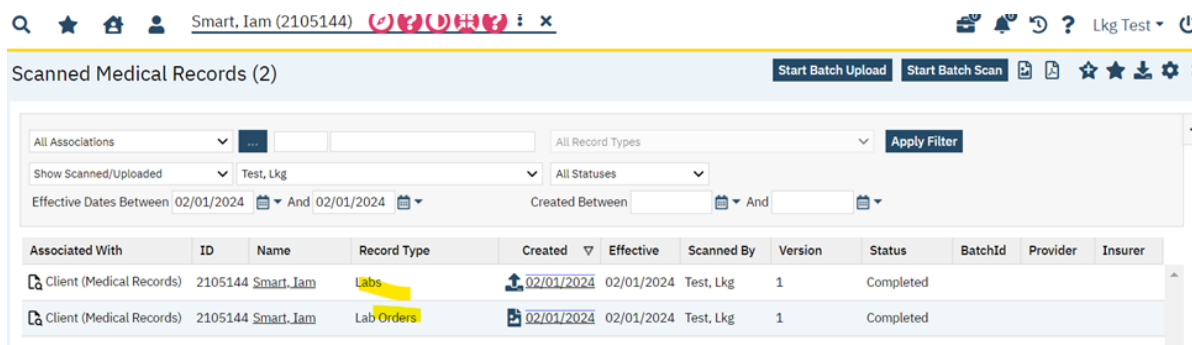


Cosigner display in PDF:

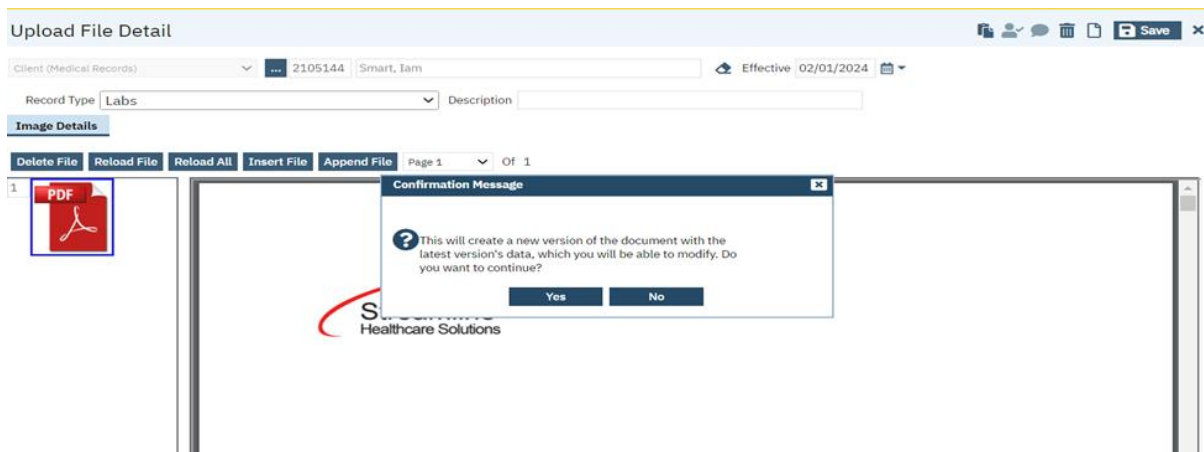
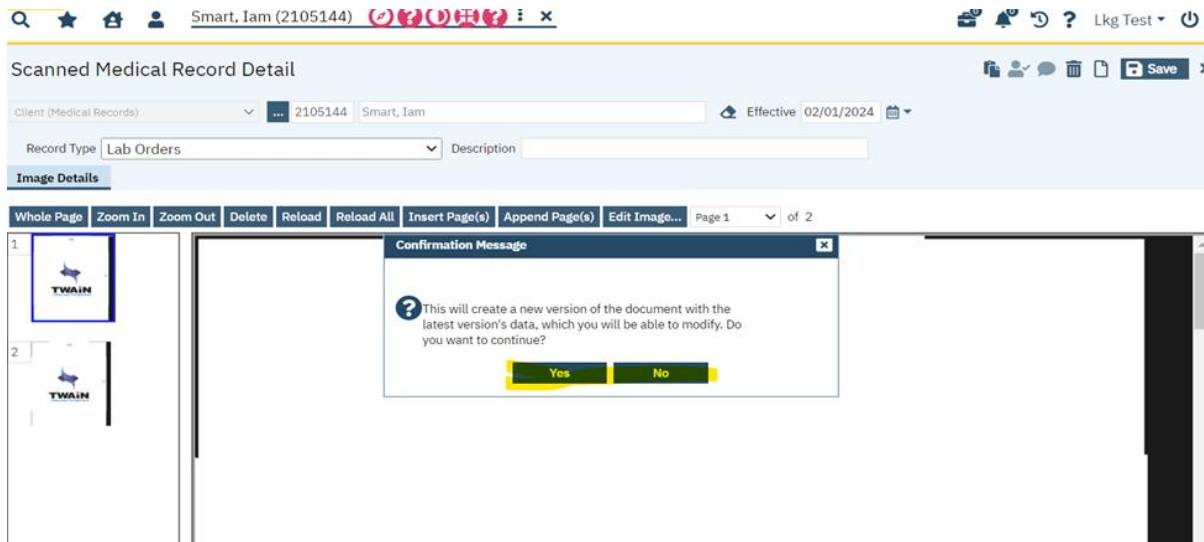


4. Open the respective Co-Signed Records by navigating to Scanned Medical Records List (Scanning under Client/My Office).

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:

**Scanned Medical Record Detail**

Client (Medical Records) ▼ ... 2105144 Smart, Iam Effective 02/01/2024 📅 Save

Record Type Lab Orders Description

**Other Versions**

- 2.02/01/2024\_Smart Iam
- 1.02/01/2024\_Smart Iam

**Image Details**

Whole Page Zoom In Zoom Out Delete Reload Reload All Insert Page(s) Append Page(s) Edit Image... Page 1 of 2

8.5

**Smart, Iam (2105144)**

### Upload File Detail

Client (Medical Records) | 2105144 | Smart, Iam | Effective 02/01/2024



Record Type: Labs | Description:

**Other Versions**

- 2 02/01/2024: Smart Iam
- 1 02/01/2024: Smart Iam

**Image Details**

Delete File | Reload File | Reload All | Insert File | Append File | Page 1 Of 1

C. On clicking No option in confirmation popup, the new version will not be created and all the operation will be disabled in the Scanned Medical Record Details screen and Insert, Upload, Append.... etc. operations cannot be done.

Refer the below Screenshot:

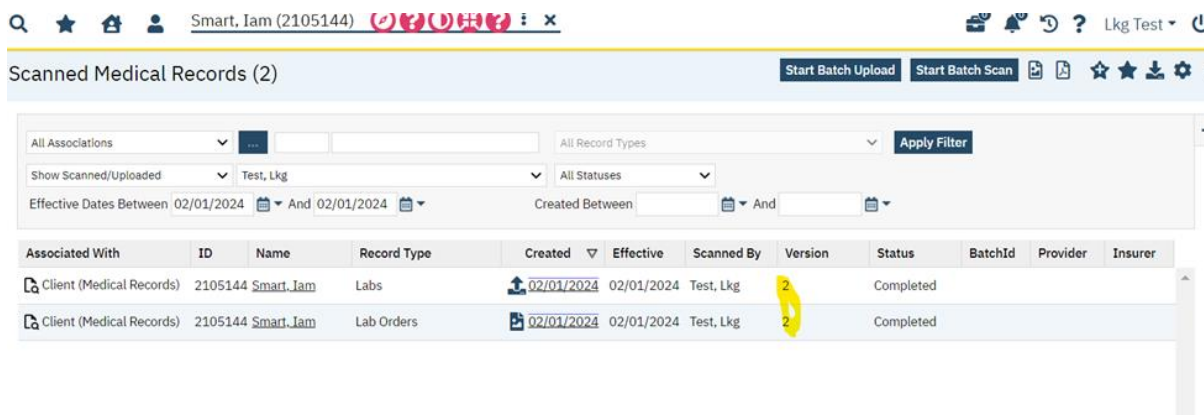
The image displays two screenshots of the Streamline Healthcare software interface, specifically the 'Scanned Medical Record Detail' and 'Upload File Detail' screens.

**Scanned Medical Record Detail:** This screen shows a patient record for 'Smart, Iam (2105144)' with an effective date of '02/01/2024'. The 'Record Type' is set to 'Lab Orders'. A list of 'Other Versions' is shown, including '2.02/01/2024\_Smart Iam' and '1.02/01/2024\_Smart Iam'. The main area displays a scanned image of a document with the number '8.5' and a 'TWAIN' logo. The interface includes a toolbar with options like 'Zoom In', 'Zoom Out', 'Delete', 'Print', 'Download All', 'Insert Page(s)', 'Remove Page(s)', 'Edit Image...', and 'Page 1 of 2'.

**Upload File Detail:** This screen shows the same patient record for 'Smart, Iam (2105144)' with an effective date of '02/01/2024'. The 'Record Type' is set to 'Labs'. A list of 'Other Versions' is shown, including '2.02/01/2024\_Smart Iam' and '1.02/01/2024\_Smart Iam'. The main area displays a PDF icon and the Streamline Healthcare Solutions logo. The interface includes a toolbar with options like 'Delete', 'Download All', 'Insert Page(s)', 'Remove Page(s)', and 'Page 1 of 1'.

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.

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**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).

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## 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.

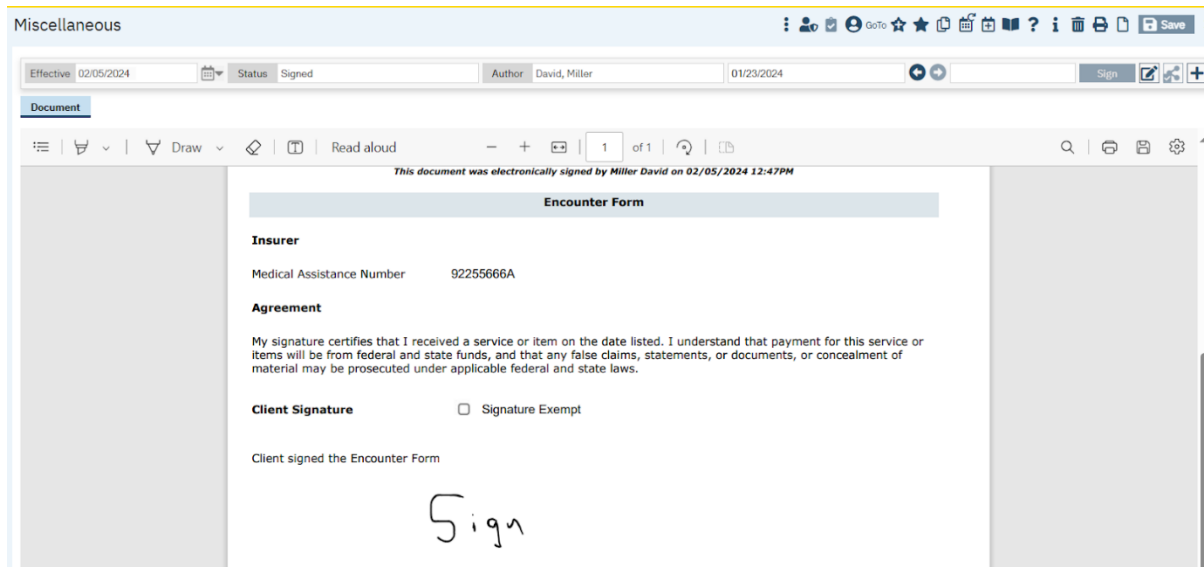
#### Functionality 'Before' and 'After' release:

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:





Miscellaneous

Effective: 02/05/2024 Status: Signed Author: David, Miller 01/23/2024

Document

This document was electronically signed by Miller David on 02/05/2024 12:47PM

**Encounter Form**

**Insurer**

Medical Assistance Number 92255666A

**Agreement**

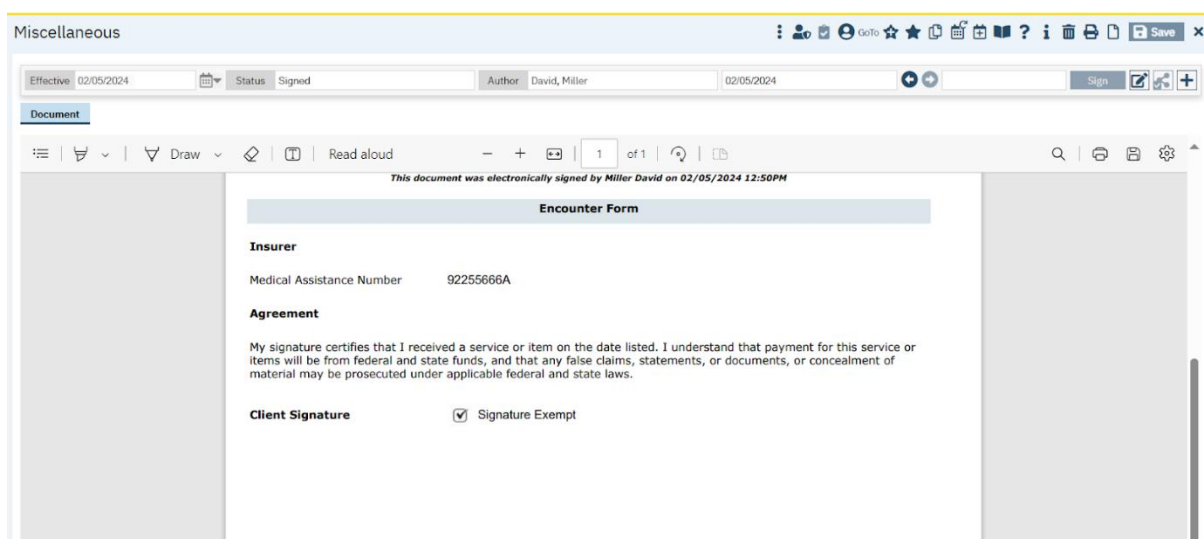
My signature certifies that I received a service or item on the date listed. I understand that payment for this service or items will be from federal and state funds, and that any false claims, statements, or documents, or concealment of material may be prosecuted under applicable federal and state laws.

**Client Signature** ☐ Signature Exempt

Client signed the Encounter Form

Sign

## 1.2. Encounter form Signature exempted :



Miscellaneous

Effective: 02/05/2024 Status: Signed Author: David, Miller 02/05/2024

Document

This document was electronically signed by Miller David on 02/05/2024 12:50PM

**Encounter Form**

**Insurer**

Medical Assistance Number 92255666A

**Agreement**

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

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.

Miscellaneous

Effective 02/05/2024
Status New
Author David, Miller
02/05/2024

Service Note Billing Diagnosis Resource Warnings Attachment(s) Disposition Encounter Form

Insurer

Medical Assistance Number 92255666A

Agreement

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

Sign Preview

**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.

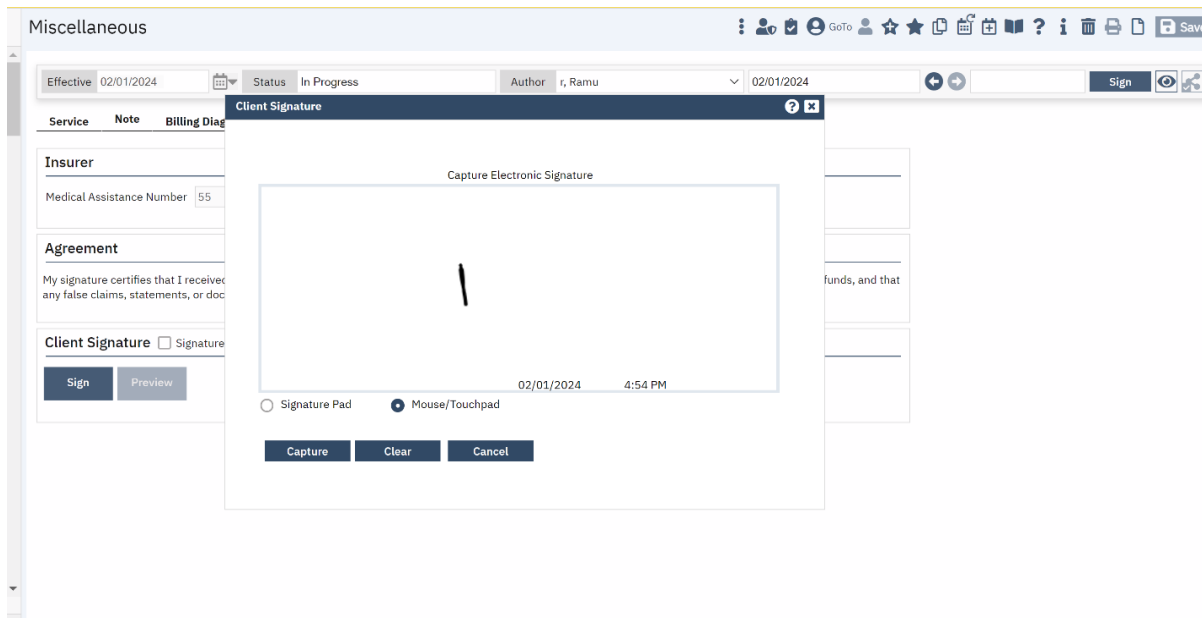
**Navigation Path 2:** 'My Office' -- 'Groups' -- 'Groups' list page -- Click on 'New' icon -- 'Group Details' page -- Enter required data and select required Group Note, Program, Procedure and Location where the Service Note document code have 'Show Encounter Form' selected as Yes -- Click on 'Schedule' 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:**

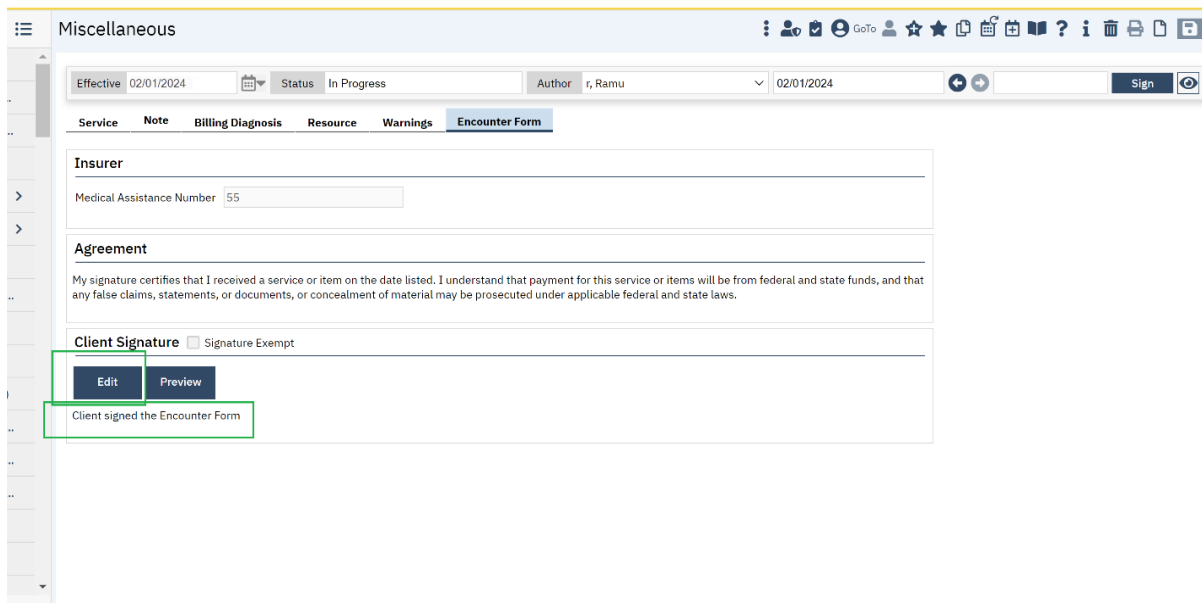
**Purpose:** To obtain a signature from client after every service to certify that the service has been provided and/or received.

**Services/Notes:**

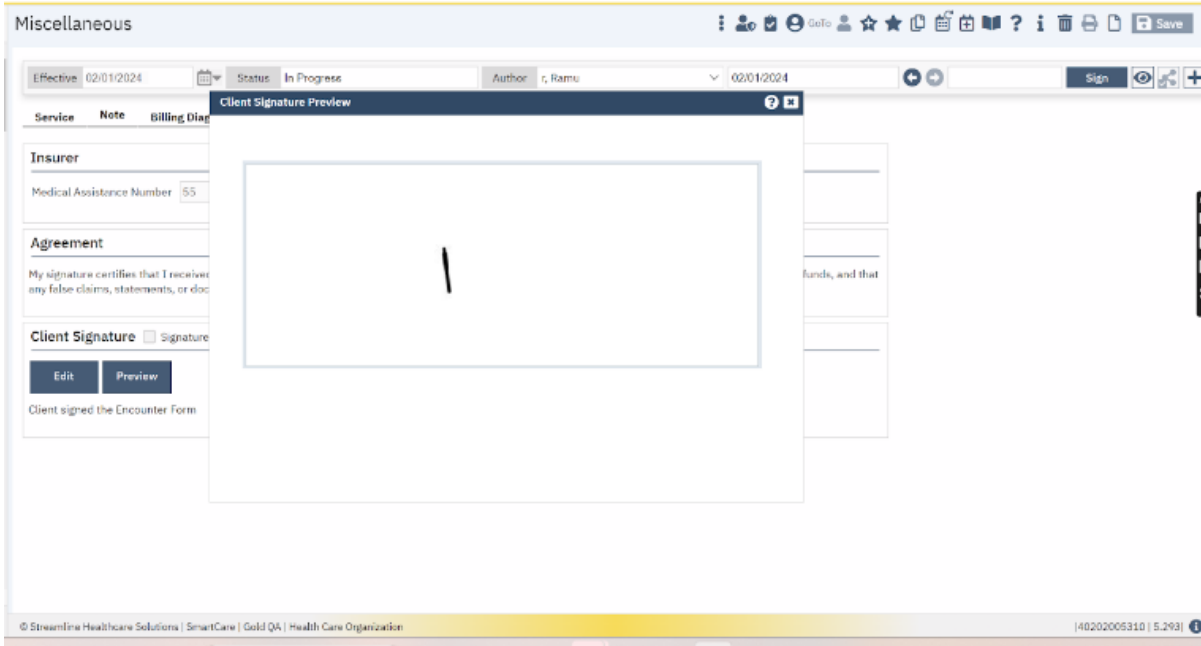
- When the user clicks on sign button in the Encounter form, the Client Signature pop-up opens with Signature Pad and Mouse/Touch Pad as signing option.



- 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 be enabled and 'Signature Exempt' check box will be disabled.

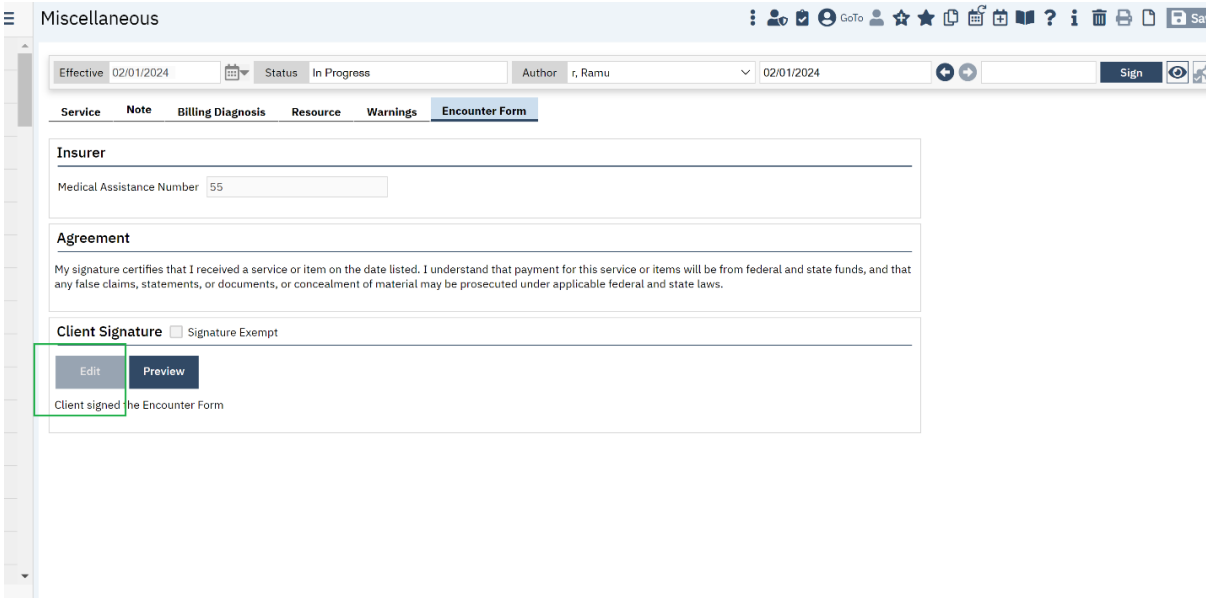


- Once the user click on 'Preview' button, the Client signature which is captured previously will be displayed.



The screenshot shows the 'Miscellaneous' form in the Streamline Healthcare system. The 'Effective' date is 02/01/2024, the 'Status' is 'In Progress', and the 'Author' is 'r, Ramu'. The 'Client Signature Preview' window is open, displaying a large rectangular area with a single vertical line, indicating the client's signature. The 'Insurer' section shows 'Medical Assistance Number' as 55. The 'Agreement' section contains the text: 'My signature certifies that I received any false claims, statements, or documents, and that'. The 'Client Signature' section has a checkbox for 'Signature' and buttons for 'Edit' and 'Preview'. Below the signature area, it says 'Client signed the Encounter Form'.

- Once the user signs the service note and edit the service note, 'Edit' button in the 'Encounter form' will be disabled.



The screenshot shows the 'Miscellaneous' form with the 'Encounter Form' tab selected. The 'Effective' date is 02/01/2024, the 'Status' is 'In Progress', and the 'Author' is 'r, Ramu'. The 'Insurer' section shows 'Medical Assistance Number' as 55. The 'Agreement' section contains the text: '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.' The 'Client Signature' section has a checkbox for 'Signature Exempt' and buttons for 'Edit' and 'Preview'. Below the signature area, it says 'Client signed 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 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."

Validations

Require Client Signature on the Encounter Form.

Test JR, Cvbn (5121)

@

+

x

GoTo

Status

In Progress

Author

ir, Remu

02/01/2024

Sign

Diagnosis

Resource

Warnings

Encounter Form

AIMS

ASAM

Assessment (Core)

Auth Detail

Authorization Document ...

CAFAS Standalone

CAGE (Core)

CCBHC Data Collection(C)

Child and Adolescent Tra...

Child and Adolescent Tra...

Childhood Trust Events S...

CIWA(C)

CIWA-B(C)

Client Meal Plan

Insurer

Medical Assistance Number

55

Agreement

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

Sign

Preview

- 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.

Miscellaneous

Document Validated Successfully

Effective 02/01/2024 Status In Progress Author r, Ramu 02/01/2024 Sign

Service Note Billing Diagnosis Resource Warnings **Encounter Form**

### Insurer

Medical Assistance Number 55

### Agreement

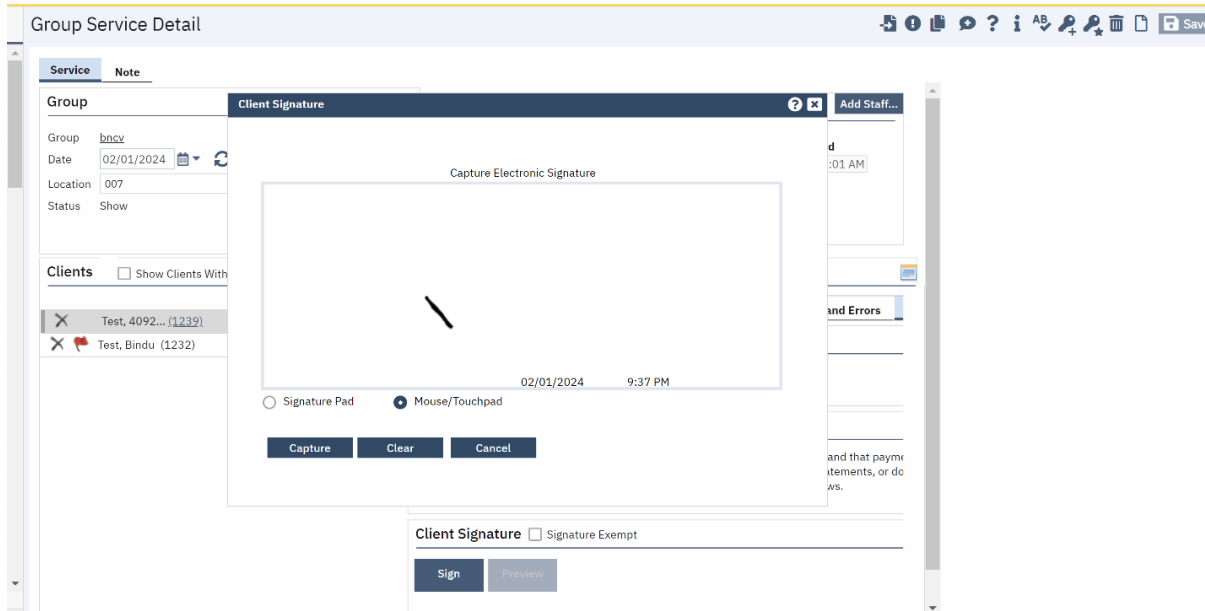
My signature certifies that I received a service or item on the date listed. I understand that payment for this service or items will be from federal and state funds, and that any false claims, statements, or documents, or concealment of material may be prosecuted under applicable federal and state laws.

### Client Signature ☒ Signature Exempt

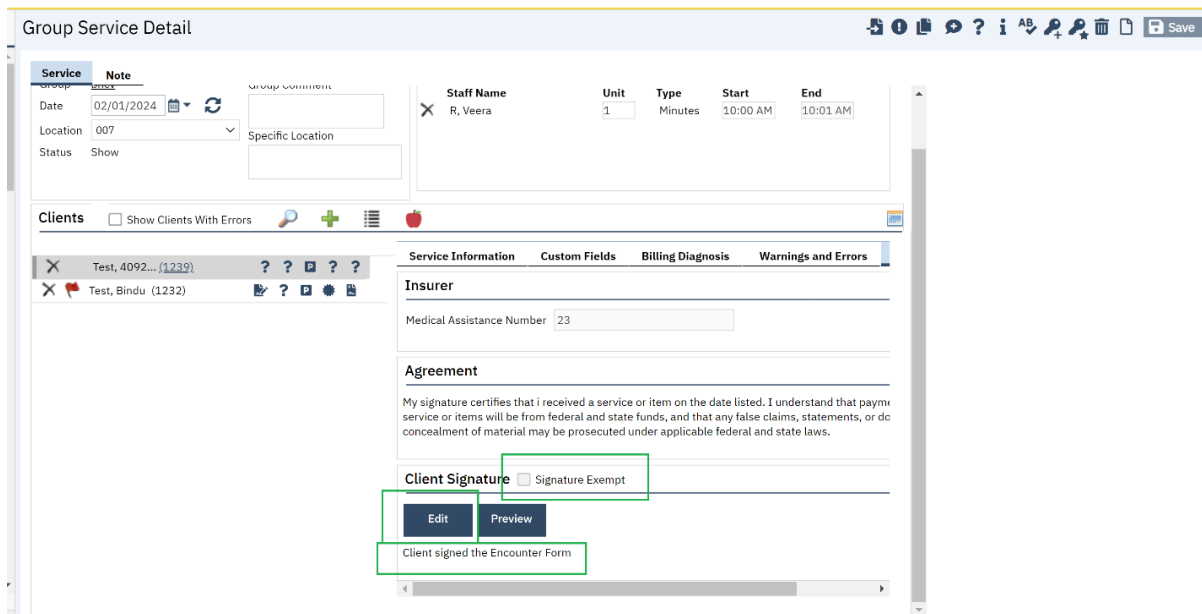
Sign Preview

**Group Service Detail:**

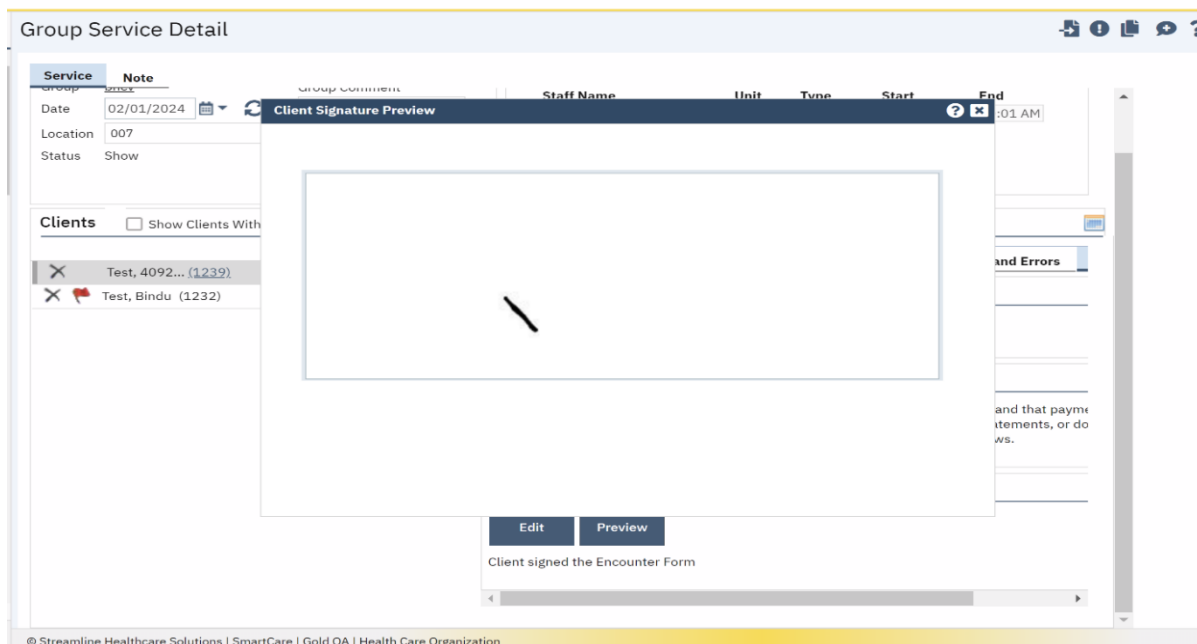
- When the user clicks on sign button in the 'Encounter form', the Client Signature pop-up opens with Signature Pad and Mouse/Touch Pad as signing option.



- 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 be 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.

Group Service Detail

Service

Note

Group

Group

hncv

Date

02/01/2024

Location

007

Status

Show

Group Comment

Specific Location

Staff

Add Staff...

Staff Name	Unit	Type	Start	End
✕ R, Veera	1	Hours	10:00 AM	11:00 AM

Clients

Show Clients With Errors

✕

Test, 4092... (1239)

?

?

?

?

?

Service Information

Custom Fields

Billing Diagnosis

Warnings and Errors

Insurer

Medical Assistance Number

23

Agreement

My signature certifies that i received a service or item on the date listed. I understand that payme service or items will be from federal and state funds, and that any false claims, statements, or do concealment of material may be prosecuted under applicable federal and state laws.

Client Signature

☒ Signature Exempt

Sign

Preview

**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



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## 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.

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**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.

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**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.

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## 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.

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## 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

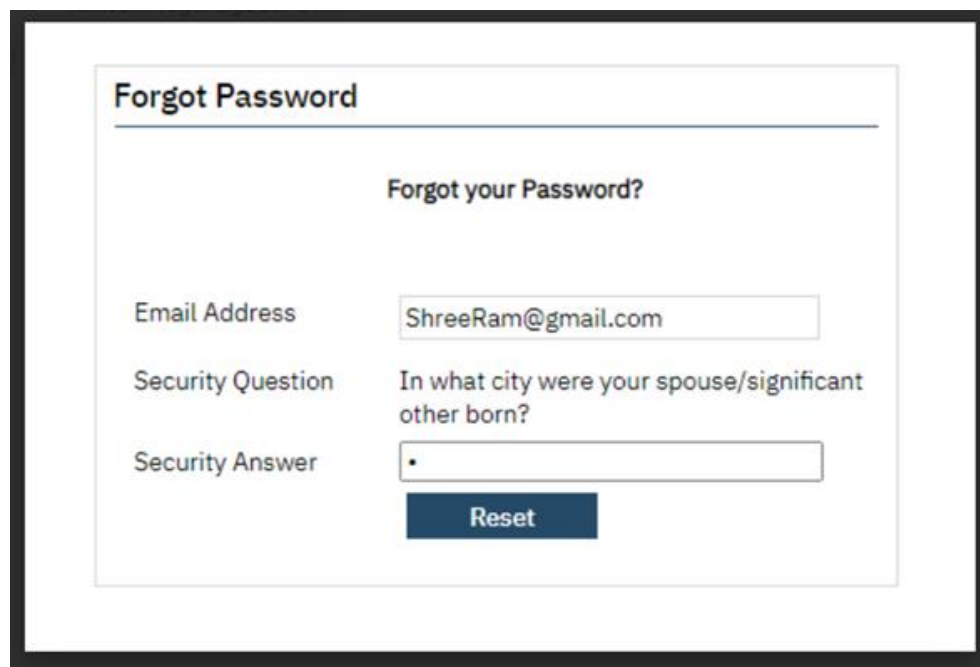
**Prerequisites:** Create an Active Directory login user in the Staff/Users screen through the **path:** Login to SmartCare application – Navigate to Staff/Users screen – Create new staff with all the details and 'Authentication Type' as 'Active Directory' so that the staff become Active Directory user.

**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."

### Forgot Password

**You are an Active Directory user. Please follow the Active Directory standard method of changing the password.**

**Forgot your Password?**

Email Address

Security Question

Security Answer

**Reset**

**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.

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**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.

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**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.

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## 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.

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## 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.

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**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.

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**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.

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## 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](#)