

RELEASE NOTES: 06/15/2024.**Monthly Service Pack – SC.CORE.6.0_1.22.000.2405.015****Executive Summary:**

1. Added a typeable search text box to display staff in the Services, Groups, Group Services, Service Note based on the system configuration Key 'DisplayStaffAsTypeableSearchTextBox' setup. This is to improve the performance of the application as staff dropdowns are not responsive when there are large number of active staffs in the environment. (EII # 126631)
2. Implementation is done to create a report that can be used to generate 'Out of Network' Coverages mapped to Clients. This is to improve the performance and usability of identifying the Coverage Plans which are associated to the Client's record. (EII # 126850)
3. An Alert Message is implemented in the New Alerts/Message Widget when a Co-Signer declined to sign a Document/Service Note from the Batch Signature screen. (EII # 127222).
4. Interaction logic is added in the Client Orders screen to display all interactions between currently prescribed medications in RX and active medications in Client Orders. (EII # 125596)
5. Implemented the default 'Clinic/Location' of the 'Lab Orders' in the 'Client Order' screen. This is because while creating orders, the providers need to select their clinic/location for the order. The customers feel it would be beneficial if this could be defaulted at the provider level to help the provider save time while completing orders. (EII # 126839)
6. The column header is added to the Threshold and PRN Activities section in My Client Activities. With this the client name will be visible in each set of activities associated to the client, which will in turn reduce the risk of data entry by the staff. (EII # 127085)
7. A new SAML login button is implemented for SAML user in the activation page of mobile application. (EII # 125812)
8. Team, Team Supervisor, Staff filters have been implemented in the 'Productivity Details Report. The purpose is --to view the performance of staff that are under specific Team supervisor(s) and --to select multiple programs when filtering for teams so the users can create a report of multiple teams in one go. (EII # 126120)
9. New columns 'Order ID' and 'Parent Order ID' are implemented in the Client Order selection pop-up. With this, the users will be able to easily know which recurring orders to modify when they need to make a change to the original Parent Order. (EII # 127070)
10. Implementation is done to add option on MAT Dispenser Detail setup for Daily Calibration. (EII # 127587)
11. The Changes to display the number of 'No Show' (missed dispenses) in red font is implemented in 'MAT Management Details' page. (EII # 127717)
12. In the 'Client Order Detail' screen, the 'Patient Safety Acknowledgement Warnings popup is displayed on signing the order. This provides the Ability for SmartCare to check the last dispense for the patient and notify the user (Nurse at the Dispense/Re-Dispense Screen) that the increase or decrease has exceeded a set amount (Min and Max). (EII # 124914)
13. Implemented a kiosk/contactless type check in, that allows clients to Check in for Services and Update demographic information. This feature introduces a system configuration key that determines how

- many minutes before the Client's scheduled service time the "Check-in" button becomes enabled on the "Appointments For Today" screen. (EII # 126640)
14. The Signed Date/Time field is added in the Encounter Form tab of Service/Notes and Group Service Notes. This will help to obtain a signature from client after every service to certify that the service has been provided and/or received. (EII # 126440)
 15. Implementation to add Lab Test Results section in Documents and Service Notes. This will help Customers to determine how many days of Lab Results data to show on each document. (EII # 126799)
 16. The 'Client Access Details', 'Client Access List', 'Client Search_new', 'Client Access Override report', and 'Recodes' screens have been implemented with validations. This implementation is to block the staff who don't have access to particular clients. (EII # 127327)
 17. The staff data loads based on the 'StaffAccessRules' permission and configuration key 'ApplyStaffAccessRule' in 'Disclosure/Request Detail', 'Supervisee Primary Caseload Widget' screens. (EII # 127114)
 18. Implementation of 'Laboratories' section to capture the "Lab Type" is done in Document codes detail screen. (EII # 126800)
 19. Implementing the dropdown option "Reset allowed amount calculation" for the charges in the 'Select Action' dropdown field, to Reset the Expected payment and Expected Adjustment. (EII # 126224)
 20. A new 'Medication Assisted Treatment' section has been implemented in Order Details screen and this will only display when 'Order Type' is 'Medication' or 'Lab'. (EII # 126835)
 21. Implementation to apply CDAG Rules for Attach/Review Documents pop-up and List of Releases section is done. The Release of Information (ROI) must follow CDAG rules and only be visible to CDAG profiles that are associated to tagged program. Due to this change, the ROI log in Client Information is allowing a breach since it is not linked to CDAG functionality. (EII # 127292)
 22. Currently there is no front-end screen for Fiscal Years and Accounting Periods table. Every time streamline has to add the Fiscal Year and its corresponding Accounting Periods in the backend tables by running a script. Hence 'Accounting Period list page' and 'Accounting Period Details' screens are implemented so that this will help the users to set the Fiscal Year and Accounting Period easily in UI. (EII # 126708)
 23. 'External Identification' Tab in Client Information(C) screen and "External ID" search field on Client Search pop up, are implemented. This is to document a client's alphanumeric external ID and search on the field in Client Search. (EII # 126687)
 24. A new global code called 'State License' is implemented under Global code Category 'DEGREE'. This will be included while Processing the PMP Requests in Rx Application. (EII # 126318)

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Abbreviation: EII - Engineering Improvement Initiatives

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TASKS SUMMARY – 'CHANGE' RELATED (41)

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5	EII # 127085	My Client Activities: The column header is added to the Threshold and PRN Activities section.	Activity Tracker
7	EII # 127222	In the New Alerts/Message Widget - an Alert Message gets generated when a Co-Signer declines to sign a Document/Service Note from the Batch Signature screen.	Batch Signature
11	EII # 127480	Persistent ID needs to be passed in the CCD file.	CCD
13	EII # 127166	Charges/Claims List page: Added a "Reset allowed amount calculation" dropdown option to the 'Select Action' dropdown field.	Charges/Claims
14	EII # 126224	Implementing the dropdown option "Reset allowed amount calculation" for the charges in the 'Select Action' dropdown field to Reset the Expected payment and Expected Adjustment.	Charges/Claims
37	EII # 125596	Implementation of Client Medication Interactions.	Client Orders
39	EII # 127070	User Cannot determine Parent Order ID from 'Client Order selection' pop-up.	Client Orders
40	EII # 126799	Implementation to add Lab Test Results section in Documents and Service Notes	Client Orders
43	EII # 127292	Implementation to apply CDAG Rules for Attach/Review Documents pop-up and List of Releases section	Clinical Data Access Groups (CDAG)
48	EII # 127327	Implementing new 'Client Access Details', 'Client Access List', 'Client Search_new', 'Access Overrides_new', and 'Recodes_New' screens.	Compliance Core
49	EII # 127597	Implementation of Configuration key to display staff drop-downs as typeable search text boxes.	Configuration Key
51	EII # 1518	Implementation of Core Assessment document with Static and Dynamic tabs, where any DFA/ Non DFA documents can be attached as a tab along with an option to configure it based on certain conditions.	Core Assessment
54	EII # 127114	'Disclosure/Request Detail', 'Supervisee Primary Caseload Widget' screen – the staff data will be loaded based on the 'StaffAccessRules' permission and configuration key 'ApplyStaffAccessRule'.	Disclosure/Request
56	EII # 126800	Implementation of 'Laboratories' section in Document codes detail screen.	Document Codes
61	EII # 126669	Referral Document: New validation message has been implemented.	Documents
75	EII # 126623	Vitals Common User Control - Add Pulse Oximetry as sub-template to Pulse	Health Data Sub Templates

80	EII # 126640	Implementing a kiosk/contactless type check in that allows clients to Check in for Services and Update demographic information.	Reception Views
81	EII # 127500	MAT: Ability to make MAT schedule required before signing client order	Methadone
82	EII # 127587	Implementation to add option on MAT Dispenser Detail setup for Daily Calibration	Methadone
83	EII # 127717	'MAT Management Details' page: Changes to display the number of 'No Show' (missed dispenses) in red font.	Methadone
84	EII # 127774	MAT: Implementation to add calendar to dispense screen	Methadone
85	EII # 124914	Changes in the 'Client Order Detail' screen & MAT: Dispense (Patient Safety Check) screen.	Methadone
86	EII # 126835	New 'Medication Assisted Treatment' section in Order Details.	Methadone
87	EII # 127507	MAT Management Details: Modification to show last 4 of SSN and Dosing information more visible	Methadone
88	EII # 126915	R6 Issue- Caseload too large pop up	My Caseload
95	EII # 126850	Implementation to create a report that can be used to generate 'Out of Network' Coverages mapped to Clients.	My Reports
97	EII # 126120	Changes are implemented to the Productivity Details Report.	My Reports
102	EII # 126353	To implement a validation in "Payment/Adjustment Posting" pop	Payments/Adjustments
103	EII # 125823	Plan Details: Update Workmans Comp to "Workers' Comp"	Plans
104	EII # 126676	Added code to set an end date to ClientProblems if the complexity of problems matches with the RecodeCategories "SetProblemEndDateFromComplexity"	Primary Care
105	EII # 126839	Implementing the default 'Clinic/Location' of the 'Lab Orders' in the 'Client Order' screen.	Primary Care
118	EII # 125633	Rx- Disable Prescribe Button.	Rx Application
119	EII # 128015	Remove NADEA validation in the prescription screens.	Rx Application
120	EII # 126318	Implementation to send the 'State License' IN Request XML which is required to stay on compliance with the state PMP Process	Rx Application
121	EII # 125812	Implementation of SAML Login button in mobile for SAML user.	SAML
127	EII # 126243	Added a new option in the existing Global Code to create multiple Add On Services	Services
131	EII # 126631	Adding a typeable search text box to display staff in the Services, Groups, Group Services, Service Note.	Services
138	EII # 126928	Implemented the permissions to Keyboard Shortcuts keys so that only permissioned users will be able to view the required Keyboard Shortcuts	SmartCare Improvements
140	EII # 126660	Json.js Preventing WalkMe Editor Functions	SmartCare Improvements
141	EII # 126687	Implementing 'External Identification' Tab in Client Information(C) screen and "External ID" search field on Client Search pop up.	SmartCare Improvements

TASKS SUMMARY – 'NEW FUNCTIONALITY' RELATED (1)

Sl. No	Task No	Summary	Module Name
130	EII # 126440	The Signed Date/Time field is added in the Encounter Form tab of Service/Notes and Group Service Notes.	Services

TASKS SUMMARY – 'DEFECT FIXES' (108)

Sl. No	Task No	Summary	Module Name
1	Core Bugs # 127828	When the user attempted to create a void 837 file, the PCCN number did not populate on the claims marked "To Be Voided".	837 Professional
3	Core Bugs # 127527	Client Accounts: Issues when regenerating a charge.	Accounts Receivable
4	Core Bugs # 127966	Flow Sheet Validation getting around	Activity Tracker
6	Core Bugs # 127977	Appointment Search: Not Finding Provider	Appointment Search
8	Core Bugs # 128077	The error message is displayed When the user tries to open the 'Bedboard' & 'Bed Census' screen.	Bed Census
9	Core Bugs # 128135	Care Coordination: Service note not Falling Off From Care Coordination Next Step	Care Coordination
10	Core Bugs # 127644	Clients are still appearing even though the clinician have been set to inactive on the client's Treatment Team.	Caseload Reassignment
12	Core Bugs # 128030	Removing the logic of 'Service and Charge' creation from the configuration key 'EvaluateServiceForNonBillableLocationBillingRule', to avoid extreme slowness while creating service.	Charges/Claims
15	Core Bugs # 127897	Billed Date was not updated for Paper claims.	Charges/Claims
16	Core Bugs # 127930	Claim processing considering the less configuration values under 'Advanced Claim Formats for Plan' pop-up in Plan details screen.	Charges/Claims
17	Core Bugs # 127621	Implementation for sending different values for Box 1 and Box 2 for UB04 and implement field overrides for Claims Format Configurations	Charges/Claims
18	Core Bugs # 126768	Billing Rule: No More than x Contacts per period (by client)	Charges/Claims
19	Core Bugs # 128032	Charges/Claims: Performance issue while processing a large number of charges.	Charges/Claims
20	Core Bugs # 127047	New validation messages are added for void claims.	Charges/Claims
21	Core Bugs # 127508	Unable to process the 'UB04(csp_PMCclaims837InstitutionalRBHS)' claims due to an error message.	Charges/Claims
22	Core Bugs # 128073	"Last Seen on Date" information is displaying only for Services in Show status	Client Account
23	Core Bugs # 127904	PregnancyIndicator flag was ending for all the clients	Client Flags

24	Core Bugs # 127845	The Flag end date is not updating, and the Flag is not deactivated.	Client Flags
25	Core Bugs # 127858	Records in the client flag list page were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank in ClientNotes table.	Client Flags
26	Core Bugs # 127856	Client age is not calculated correctly in Client Search information hover.	Client Information(C)
27	Core Bugs # 127905	Client Information: 'Comments' field was not accessible in Financial Tab.	Client Information(C)
28	Core Bugs # 128072	Error information is not captured if any error occurred while opening Inquiry-New Client.	Client Inquiries
29	Core Bugs # 125647	Inquiry details screen: On selection of 'Register Client' button, the user was unable to navigate to the registration document.	Client Inquiries
30	Core Bugs # 127980	Client MAR: The Gray tick mark is not displayed for past due medications if medication is not administered.	Client MAR
31	Core Bugs # 128019	Client MAR: Orders with flowsheets that are completed via MAR are losing answers to the flowsheet questions after save.	Client MAR
32	Core Bugs # 127195	Client Orders' list page: The Lab order 'Clinic/Location' is converting/changing to the wrong clinic location.	Client Orders
33	Core Bugs # 127876	Client Orders / The Ordering Physician information showing in the PDF that is not correct	Client Orders
34	Core Bugs # 128011	Barcode pdf is displayed blank in the 'Results and Requisitions popup' while clicking on the BarCode Scan icon.	Client Orders
35	Core Bugs # 127972	User not able to sign the Client Orders due to validation	Client Orders
36	Core Bugs # 128065	Client Orders/Detail page: The 'Comments' popup failed to open due to the presence of line break statements in the comments text.	Client Orders
38	Core Bugs # 128150	Modified Date/ Time is not displayed in the Client Orders PDF.	Client Orders
41	Core Bugs # 128131	Client Search icon the system was taking more time to load the list of Clients.	Client Search
42	Core Bugs # 128154	Issue in Quicklinks icon display.	Client Search
44	Core Bugs # 127866	Internal Consent Management: Care Consent is not allowing users to have view access to documents outside of their CDAG when it is supposed to.	Clinical Data Access Groups (CDAG)
45	Core Bugs # 127922	Scanning' and 'Scanned Medical Records' list: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank.	Clinical Data Access Groups (CDAG)
46	Core Bugs # 127877	'Document', 'My Documents' and 'Disclosures/Requests': CDAG logic change to consider 'ProgramId' value if the 'ClientProgramId' value does not exist.	Clinical Data Access Groups (CDAG)
47	Core Bugs # 127176	User is able to sign documents under programs they're no longer a part of.	Clinical Data Access Groups (CDAG)
50	Core Bugs # 127790	Contact Notes list Page: An error message is displayed when trying to navigate to the 'Contact Note Detail' screen from the 'Contact Notes' list page.	Contact Notes
52	Core Bugs # 127943	After executing the nightly billing job the Daily Limit field in the Aggregate Limits popup under the plan details is not	Coverage Plans

		getting updated in the Charge error section of the Charge details screen.	
53	Core Bugs # 127826	Incident Reports(C) Widget: Notifications are not working for the new 'Core Incident Report' in the Dashboard.	Dashboard
55	Core Bugs # 128066	User not able to edit the Service Notes	Document Codes
57	Core Bugs # 128111	The duplicate diagnosis codes (ICD 10 Code) are displayed in 'Client Clinical Problems' list page.	Documents
58	Core Bugs # 127896	Diagnosis document: Pull From Client Clinical Problem List Not Working on Diagnosis Document	Documents
59	Core Bugs # 127862	The data is not initialized in the 'Rapid Opioid Dependence' PDF document from the 'History and Current Use of Substances' section of the signed 'Assessment Document'.	Documents
60	Core Bugs # 128043	Information in the 'Consent to Treat' document PDF was not displaying properly.	Documents
62	Core Bugs # 127581	Agency/Program Discharge: Unwanted special characters displayed in Validation Message pop-up.	Documents
63	Core Bugs # 128097	Diagnosis Document: For specific ICD code (F50.81) duplicate values are displayed in the Favorite list.	Documents
64	Core Bugs # 128095	Core TEDS Data Set: Incorrect validation message was displayed.	Documents
65	Core Bugs # 128204	Document Codes – Duplicate document codes are appearing in the 'Document Codes' screen.	Documents
66	Core Bugs # 128075	Registration Document and Client Information: Primary Care Physician values were not displayed	Documents
67	Core Bugs # 128018	DFA Service Note does not include all the service details in the PDF header.	Dynamic Forms
68	Core Bugs # 127343	A blank PDF is displayed when the user sign DFA Via Smartphone	Dynamic Forms
69	Core Bugs # 127843	Error information is not captured if any error occurred in DFA screens that has 'Globalcode' Dropdowns	Dynamic Forms
70	Core Bugs # 128014	newly added columns not getting displayed in the 'Target Column' field present in the 'Column Mapping' tab of 'Initialization Editor' screen	Dynamic Forms
71	Core Bugs # 127924	Grievances/Appeals List Page: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists, but 'ClientProgramId' value is blank.	CDAG
72	Core Bugs # 128087	Groups – Unable to view the accessed groups when the client got deleted.	Group Detail
73	Core Bugs # 127918	The Red Flag was displayed for the client after erroring out the group service.	Group Services
74	Core Bugs # 127867	Group Note Slowness	Group Services
76	Core Bugs # 128036	Inquiries (My Office) - Multiple Dispositions not showing when the Inquiries list page is exported to an Excel sheet.	Inquiries
77	Core Bugs # 128010	Server name was inserted for ModifiedBy column in the ClientCoveragePlans table on saving Inquiry.	Inquiries
78	Core Bugs # 127498	PCP Letter Text Template: Issues with Spaces and Formatting are not clean like a formal letter	Letter Templates
79	Core Bugs # 127910	PCP Letter template: DOB and spacing issues.	Letter Templates

89	Core Bugs # 128069	getting error messages when trying to open up the My Documents (My Office) page.	My Documents
90	Core Bugs # 127846	UDS Table 7 Health Outcomes and Disparities report Issue- Section C for Document Diagnosis or Billing diagnosis any one signed count will take for the client logic changes.	My Reports
91	Core Bugs # 127940	FQHC UDS Table 7 Report Issue-- Changes in the service status and duplicate count in unreported disclose race	My Reports
92	Core Bugs # 127807	FQHC UDS Table 4 - Uninsured Population	My Reports
93	Core Bugs # 128076	Exclude Test Clients from UDS Report	My Reports
94	Core Bugs # 127949	Reports: error displayed in the report was invisible(white)	My Reports
96	Core Bugs # 128064	'Month - End-AR Roll Over Summary' Report: Not filtering by what is selected in the report parameters.	My Reports
98	Core Bugs # 127819	UDS Table 5 Staffing and Utilization Report: Clinical Visits(b) column is showing blank	My Reports
99	Core Bugs # 127878	Check-in notification popup is closing if there are no new check-in notifications	Notifications
100	Core Bugs # 128082	New User Role is Automatically Being Created.	Patient Portal
101	Core Bugs # 127998	Payment Category (Unposted Payments - Deferred Revenue) - GL Debit/Credit is not Correct.	Payments/Adjustments
106	Core Bugs # 127529	creating bundled services when program is not associated to the Procedure	Procedure/Rates
107	Core Bugs # 127931	Program Assignment Details: When a user tried to enroll in the same program which is already in the discharged status then the system was throwing an incorrect validation message.	Programs
108	Core Bugs # 128055	Programs: Client Programs Not Populating in the PAS 44 Admission Form	Programs
109	Core Bugs # 127884	Billing Code Rule Cap amount and claim charged amount limited to 7 characters.	Provider Contract
110	Core Bugs # 127907	Ordering of the Quicklinks not changing	QuickLinks
111	Core Bugs # 128051	Additional/duplicate check-in notifications on primary care appointments	Reception
112	Core Bugs # 127893	Prescribed medications were not displayed in the View Medication History page.	Rx Application
113	Core Bugs # 127881	User logged out of the application on selecting drug from dropdown	Rx Application
114	Core Bugs # 127863	RX: Medication Management Slowness	Rx Application
115	Core Bugs # 126920	Queued Order multiple click on Approve Order - TFA Issue.	Rx Application
116	Core Bugs # 128041	The Outbound Prescription tab in SmartCare RX is not displaying any data	Rx Application
117	Core Bugs # 128144	RX: Prescriber Credentials are missing on Refills/Reorder Medications.	Rx Application
122	Core Bugs # 127989	Duplicate screen names are displayed.	Screens
123	Core Bugs # 127683	My Documents and Documents: Error was displayed when the user tried to access the Documents	Services
124	Core Bugs # 127468	Services are completed even though Do Not Complete is checked	Services

125	Core Bugs # 127957	Deleted Programs displayed in Programs Dropdown list on Procedure/Rate Screen.	Services
126	Core Bugs # 127890	Psychiatric Evaluation note: Invalid error message is displayed for newly added primary Diagnosis order of 1.	Services
128	Core Bugs # 128037	Recurring Individual Services: The services are not processed or created even after running the SQL job 'Recurring Appointments And Group Services' still displayed as Service Exists on the 'My Calendar' screen.	Services
129	Core Bugs # 128040	Bundled Services are not created for Inactive clients.	Services
132	Core Bugs # 128006	Quick Order screen: An error message is displayed when trying to save the data.	Services/Notes
133	Core Bugs # 127934	Psychiatric Note: The entered data is erased when the user tries to enter the data in the 'Today's Chief Complaint/Reason for Visit' field and clicks on the 'Same as Last Visit' button.	Services/Notes
134	Core Bugs # 128107	Psychiatric Note PDF: The text in the 'Plan' section of the PDF was being cut off on the right side when the user signed the 'Psychiatric Note'.	Services/Notes
135	Core Bugs # 127978	Duplicate Client ID appears when opening a respective Co-Sign description from Supervisee Documents.	Services/Notes
136	Core Bugs # 128084	Goals/Objectives not initialized into ISN when selected in ISP interventions.	Services/Notes
137	Core Bugs # 127842	Favorite Disappeared when the user clicked on the 'Favorite' search icon.	SmartCare Improvements
139	Core Bugs # 127991	New Password Expiring Right After Being Set	SmartCare Improvements
142	Core Bugs # 128046	The font color is White in Staff Calendar.	Staff Calendar
143	Core Bugs # 127782	Staff Details screen: In 'Demographic/ Professional' tab, the Race and Language dropdowns do nothing when clicked	Staff/Users
144	Core Bugs # 128045	The 'TEDS episodes' are neither generated nor appeared on the 'TEDS Tracking List' page upon assigning the program to the client.	TEDS Tracking List
145	Core Bugs # 127965	Flowsheet: Error displayed on saving the data and closing the screen	Whiteboard
146	Core Bugs # 128022	Whiteboard not saving	Whiteboard
147	Core Bugs # 127932	Tracking Widget timing out.	Widgets
148	Core Bugs # 127935	Getting error while loading the 'Document To Do' widget.	Widgets
149	Core Bugs # 127892	Lab Result Widget: The 'Staff selection' search field did not retain the staff name entered by the user.	Widgets
150	Core Bugs # 128137	Display issue in Client Order detail screen.	Client Orders

Functionality-wise Task Details:

837 Professional

Reference No	Task No	Description
1	Core Bugs # 127828	When the user attempted to create a void 837 file, the PCCN number did not populate on the claims marked "To Be Voided".

Author: Roopa Hemanna

1. Core Bugs # 127828: When the user attempted to create a void 837 file, the PCCN number did not populate on the claims marked "To Be Voided".

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

Prerequisites:

1. The standard electronic claim format is selected as 'HIPAA 837 Professional' in the Plan details page.
2. A charge is billed first to create an associated claim line item.

Navigation Path 1: 'My Office' -- 'Charges/Claims' list page -- Filter with Billed Charge Id's -- click on 'Claim Line Item ID' hyperlink -- Navigate to 'Claim Line Item Detail' screen -- 'Claim Line Details' tab -- click on 'Override' button -- check 'To Be Voided' checkbox -- click on 'Claim Details' tab -- Go to 'Claim Group' section -- enter data in 'Payer Control Number' text box -- click on 'Save' button.

Navigation Path 2: 'My Office' -- 'Charges/Claims' list page -- Filter with Billed Charge Id (Ref navigation path mentioned in the Prerequisite) -- Select 'Charge Id' -- click on 'Eclaim' button -- 'Claims Processing' pop up -- click on 'Process Now' button -- Click on 'Create Claim File' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user attempted to create a void 837 file, the PCCN number did not populate on the claims marked "To Be Voided". The claim status was correct, but the PCCN number did not populate, and there were no errors indicating its absence.

With this release, the above mentioned issue has been resolved. Now, the PCCN number is displayed on the void 837 claims marked "To Be Voided".

Accounting Period

Reference No	Task No	Description
2	EII # 126708	Implementation of a 'Accounting Period list page' and 'Accounting Period Details' screen.

Author: Yashas kydalappa

2. EII # 126708: Implementation of a 'Accounting Period list page' and 'Accounting Period Details' screen.

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

Navigation Path 1: 'Administration' -- 'Accounting Period' -- 'Accounting period' list page.

Navigation Path 2: 'Administration' -- 'Accounting Period' -- 'Accounting period' list page -- Click on New icon - Accounting Period Details screen.

Navigation Path 3: 'Administration' -- 'Accounting Period' -- 'Accounting period' list page -- Click on the Fiscal Year (Hyperlink) -- Accounting Period Details screen -- Copy icon.

Functionality 'Before' and 'After' release:

Purpose: Currently, there is no front-end screen for FiscalYears and AccountingPeriods table. Every time streamline has to add the Fiscal Year and its corresponding Accounting Periods in the backend tables by running a script. Hence a front end screen is implemented and this will help the users to set the Fiscal Year and Accounting Period easily.

With this release, a new 'Accounting Period' list page and 'Accounting Period Details' screen has been implemented for inserting the 'Accounting Period' and 'Fiscal Year'.

1. 'Accounting Period' List Page.

The below mentioned details will be displayed in the accounting period list page.

Accounting Period (52)						
<div>Accounting Period Start Date: 01/01/2021 Accounting Period End Date: 12/31/2025 All Fiscal Year Apply Filter</div>						
Accounting Period ID	Fiscal Year	Accounting Period Start Date	Accounting Period End Date	Description	Open Period	Sequence Number
280	2021	01/01/2021	01/31/2021	January 2021	Yes	4
281	2021	02/01/2021	02/28/2021	February 2021	Yes	5
282	2021	03/01/2021	03/31/2021	March 2021	Yes	6
283	2021	04/01/2021	04/30/2021	April 2021	No	7
284	2021	05/01/2021	05/31/2021	May 2021	Yes	8
285	2021	06/01/2021	06/30/2021	June 2021	Yes	9
286	2021	07/01/2021	07/31/2021	July 2021	No	10
287	2021	08/01/2021	08/31/2021	August 2021	Yes	11
288	2021	09/01/2021	09/10/2021	September 20...	Yes	12
293	2021	10/01/2021	10/31/2021	October 2021	Yes	13
295	2021	11/01/2021	11/30/2021	November 20...	Yes	14
296	2021	12/01/2021	12/31/2021	December 2021	Yes	15

Filter section:

Accounting Period Start Date: This is a Date control field and it is a required field.

Accounting Period End Date: This is a Date control field and it is a required field. The End date should be greater than the 'Accounting Period Start Date', if the End Date is lesser than the start date, then the system will throw the validation.

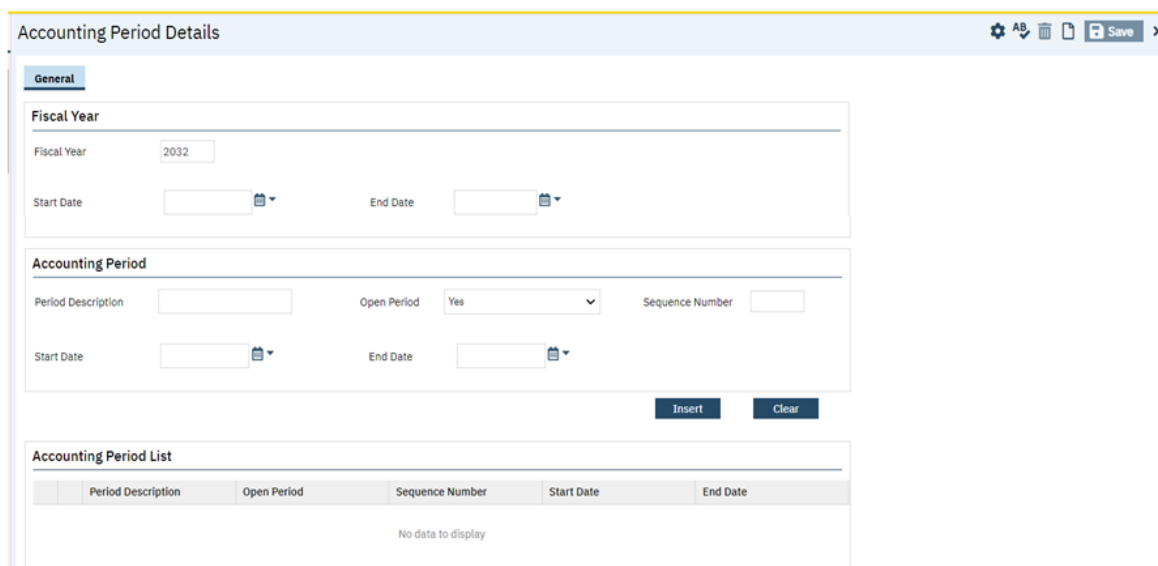
Fiscal Year: This is a single select dropdown field. All of the active Fiscal year will be displayed, the users can select the particular Fiscal year or 'All Fiscal Year'.

Grid Section:

- Accounting Period ID
- Fiscal Year
- Accounting Period Start Date
- Accounting Period End Date
- Description
- Open Period
- Sequence Number.

2. The Accounting Period Details screen will be displayed when click on the 'New' button under 'Accounting Period' List Page and when click on the Fiscal Year hyperlink, it will navigate to the Accounting Period Details screen also.

'Accounting Period Details' screen:



The Accounting Period Details screen is displayed with General tab, the General tab is displayed with following sections:

- Fiscal Year
- Accounting Period
- Accounting Period List

The Fiscal Year section is displayed with following fields:

1. **Fiscal Year:** This is a numerical textbox and this field accepts only 4 numerical digits.

- The system will throw the following error message "Please enter 4 digit number for Fiscal Year" if the entered value is not numeric or more than 4 digits are entered.
- The system will throw the validation when trying to insert the Duplicate or already Existing Fiscal year, "Same Fiscal Year cannot be created more than once".

Start Date: This is the Date control field and this is a required field.

End Date: This is a Date control field and this is a required field.

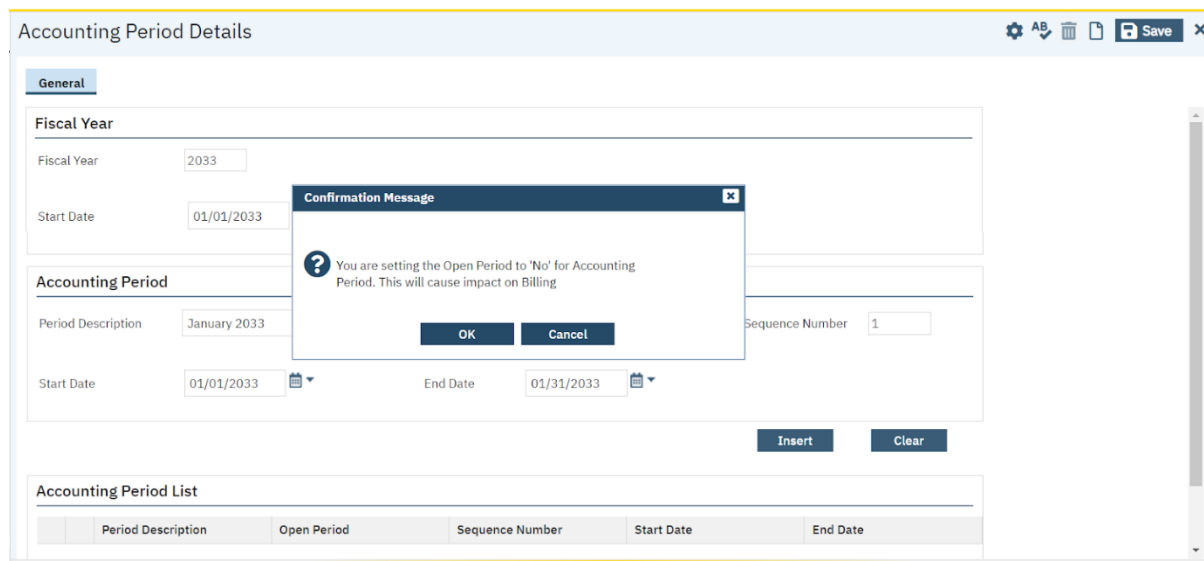
- If the user tries to update or delete the existing Fiscal Year which is having Financial Activity, then the system will throw the validation stating that "Update and Deletion of Fiscal Year which is having Financial Activity is not allowed".

2. The Accounting period section is displayed with following fields:

i. Period Description: This is a textbox and the user can enter a particular Accounting Period description under the inserted Fiscal year. This is a required field.

ii. Open Period: This is a dropdown field the dropdown values are displayed with 'Yes' and 'No' values and it is a required field. By default, the value 'Yes' is selected.

If Open Period is set as 'No' for any Accounting Period, throw a warning message stating that "You are setting the Open Period to 'No' for Accounting Period. This will cause impact on Billing" with Ok and Cancel Button.



The screenshot shows the 'Accounting Period Details' form. It has a 'General' tab selected. Under 'Fiscal Year', there is a 'Fiscal Year' field with '2033' and a 'Start Date' field with '01/01/2033'. Under 'Accounting Period', there is a 'Period Description' field with 'January 2033', a 'Start Date' field with '01/01/2033', and an 'End Date' field with '01/31/2033'. A 'Sequence Number' field has '1'. A confirmation message pop-up is displayed in the center, stating: 'You are setting the Open Period to 'No' for Accounting Period. This will cause impact on Billing'. The pop-up has 'OK' and 'Cancel' buttons. At the bottom of the form, there are 'Insert' and 'Clear' buttons. Below the form is an 'Accounting Period List' table with columns: Period Description, Open Period, Sequence Number, Start Date, and End Date.

- Clicking on 'Ok' will mark the Open Period as 'No'.
- Clicking on Cancel will close the confirmation message pop-up without making the changes to the record.

iii. Sequence Number: This is a numerical text field and it is a required field.

- If the user tries to insert other than a numeric value, then the system will throw an error stating "**Please enter a numeric value**".
- Same Sequence number can't be inserted twice for the different accounting period, then the system will throw an error stating **Overlapping of Sequence Number should not be allowed**.

iv. Start Date: This is a date control field and it is a required field.

v. End Date: This is a date control field and it is a required field.

- Overlapping of dates is not allowed, the system will throw the error whenever an overlapping of dates is found, as follows: **'Dates are overlapped. Please correct the dates.'**

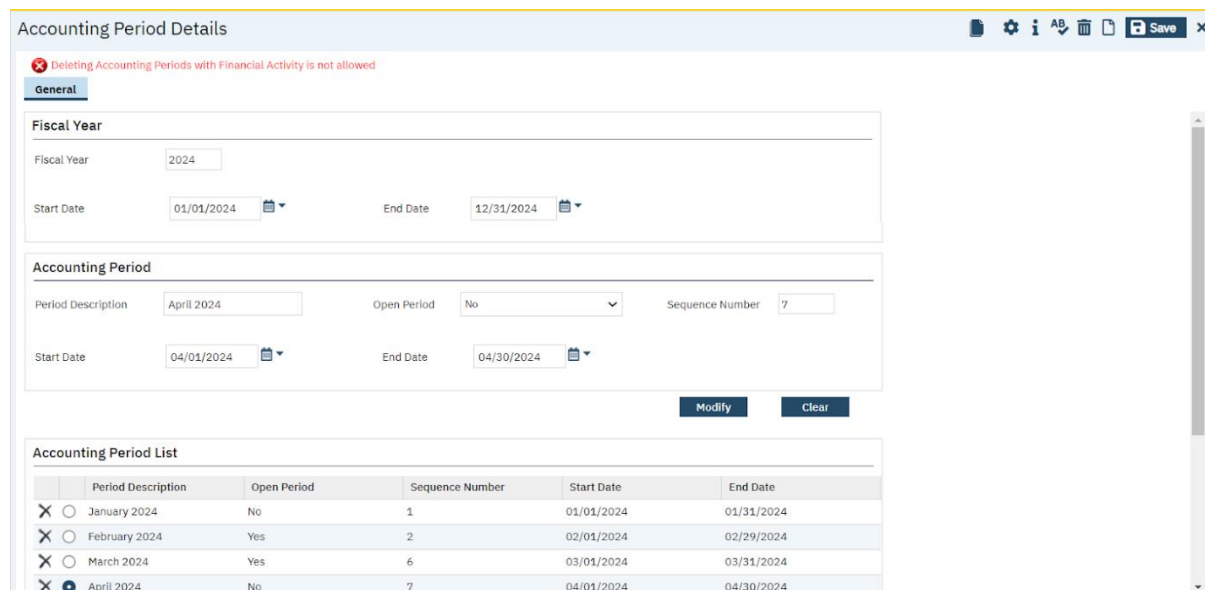
- Accounting Periods should not have any gaps for the respective Fiscal year start date to End Date. If Accounting periods have a gap under the fiscal year start date to end date, then the system will throw the error stating '**Some Accounting Periods are missing. Please correct it.**'
- If any leap year comes for the Fiscal Year, the system considers the leap year date. If the user not entered the leap year date, then the system will throw the error, Stating '**Some Accounting Periods are missing. Please correct it.**'

Insert: This will insert the entered data into the grid.

Modify: This button will be enabled when selecting a row under the accounting period list grid by click on the respective radio button.

Clear: This will clear the entered values in the accounting period section.

Delete (X) icon: The system will throw the Error stating **Deleting Accounting Periods with Financial Activity is not allowed**, when try to delete the accounting period which is having financial activity.



Accounting Period Details

Deleting Accounting Periods with Financial Activity is not allowed

General

Fiscal Year

Fiscal Year: 2024

Start Date: 01/01/2024 End Date: 12/31/2024

Accounting Period

Period Description: April 2024 Open Period: No Sequence Number: 7

Start Date: 04/01/2024 End Date: 04/30/2024

Accounting Period List

	Period Description	Open Period	Sequence Number	Start Date	End Date
X <input type="radio"/>	January 2024	No	1	01/01/2024	01/31/2024
X <input type="radio"/>	February 2024	Yes	2	02/01/2024	02/29/2024
X <input type="radio"/>	March 2024	Yes	6	03/01/2024	03/31/2024
X <input checked="" type="radio"/>	April 2024	No	7	04/01/2024	04/30/2024

3. The Accounting Period List is displayed with following grid columns:

The Accounting Period List will display the data which has been entered in the Accounting Period section. The Grid Section is displayed with following columns.

- Period Description
- Open Period
- Sequence Number
- Start Date
- End Date

4. In the Accounting Period Details screen, the 'Copy' icon will be displayed only when the user clicks on the Fiscal Year hyperlink under the Accounting Period List page.

'Accounting Period Details' screen with Copy icon.

The screenshot shows the 'Accounting Period Details' screen. At the top, there is a toolbar with icons for navigation, settings, and saving. The main area is divided into two sections: 'Fiscal Year' and 'Accounting Period'. The 'Fiscal Year' section has fields for 'Fiscal Year' (set to 2024) and 'Start Date' (set to 10/01/2024). The 'Accounting Period' section has fields for 'Period Description' and 'Start Date'. A 'Copy Accounting Period' dialog box is open, showing 'Fiscal Years and Accounting Periods copied from' set to 2024 and 'Copy Accounting Periods upto Fiscal Year' set to an empty field. The dialog box has 'Ok' and 'Cancel' buttons. Below the dialog box, there is an 'Accounting Period List' table with columns: Period Description, Open Period, Sequence Number, Start Date, and End Date. The table contains one row with the following data: Period Description: 'Fiscal Year 2024', Open Period: 'Y', Sequence Number: '1', Start Date: '01/01/2024', End Date: '01/31/2024'.

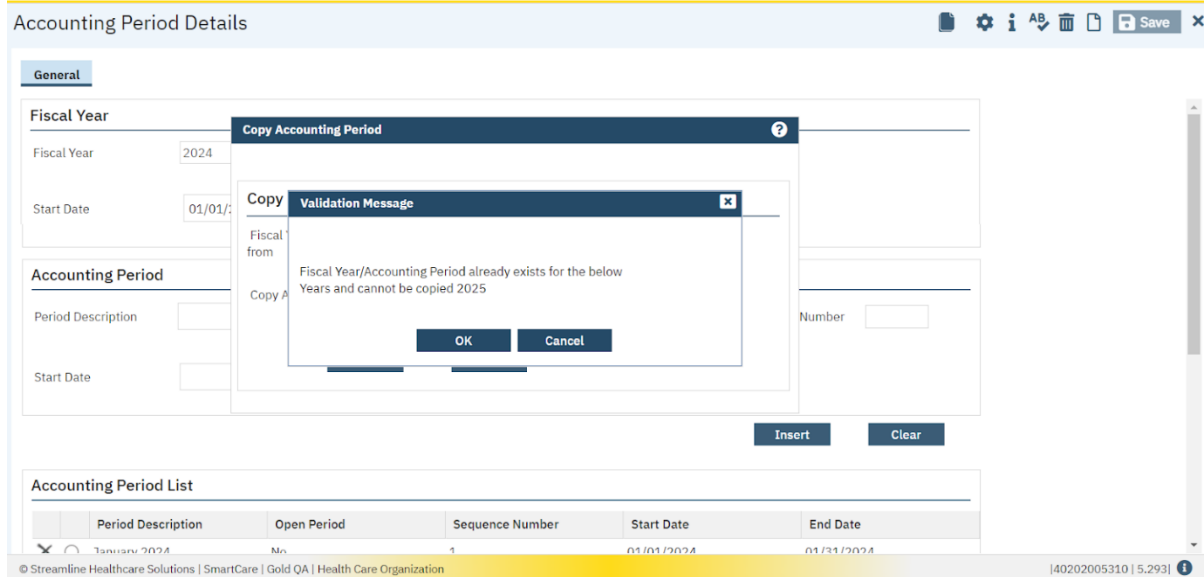
5. 'Copy' icon: The Copy icon will be visible when we navigate to the details screen through the Fiscal year hyperlink from the Accounting period list page.

The 'Copy' icon is located at the top right corner of the screen. The icon is enabled, if 'Fiscal Year' and 'Accounting Periods' already exist for a record. On click of this icon, Copy Accounting Period popup opens up with the following fields:

Fiscal Years and Accounting Periods copied from: By default, this is disabled. The same Fiscal Year will be displayed whichever fiscal year present in the list page of the Fiscal year hyperlink.

Copy Accounting Periods upto Fiscal Year: This is a text box.

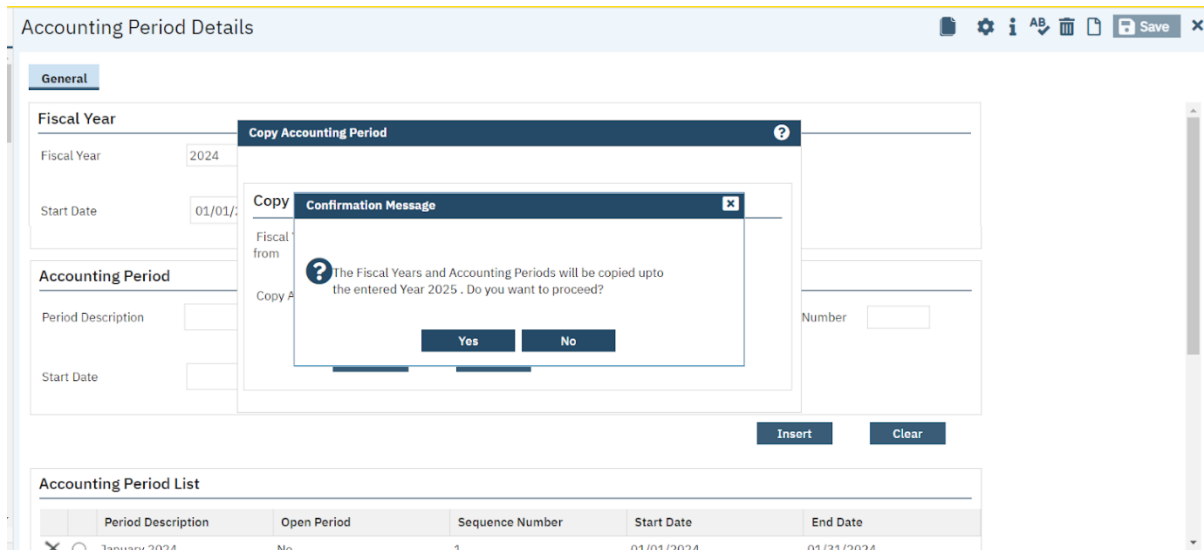
- If user tries to insert the current Fiscal year and Previous Fiscal year, then the system will throw the error – **'Copy Accounting Periods must be greater than Fiscal Years.'**
- If the Inserted Fiscal year already exist, then the system will throw an error validation stating that **Fiscal Year/Accounting Period already exists for the below Years and cannot be copied.**
- While copying the accounting period up to next upcoming fiscal year in which some of the fiscal year already exists, then while copying, the system will throw the validation message stating **'Fiscal Year/Accounting Period already exists for the below Years and cannot be copied'**. On click of 'Ok' button, the system will create for remaining Fiscal years.



The screenshot shows the 'Accounting Period Details' form with the 'General' tab selected. The 'Fiscal Year' is set to 2024 and the 'Start Date' is 01/01/2024. A 'Copy Accounting Period' dialog box is open, displaying a 'Validation Message' that states: 'Fiscal Year/Accounting Period already exists for the below Years and cannot be copied 2025'. The dialog has 'OK' and 'Cancel' buttons. Below the dialog, the 'Accounting Period List' table is visible, showing a single entry for 'January 2024'.

Period Description	Open Period	Sequence Number	Start Date	End Date
January 2024	No	1	01/01/2024	01/31/2024

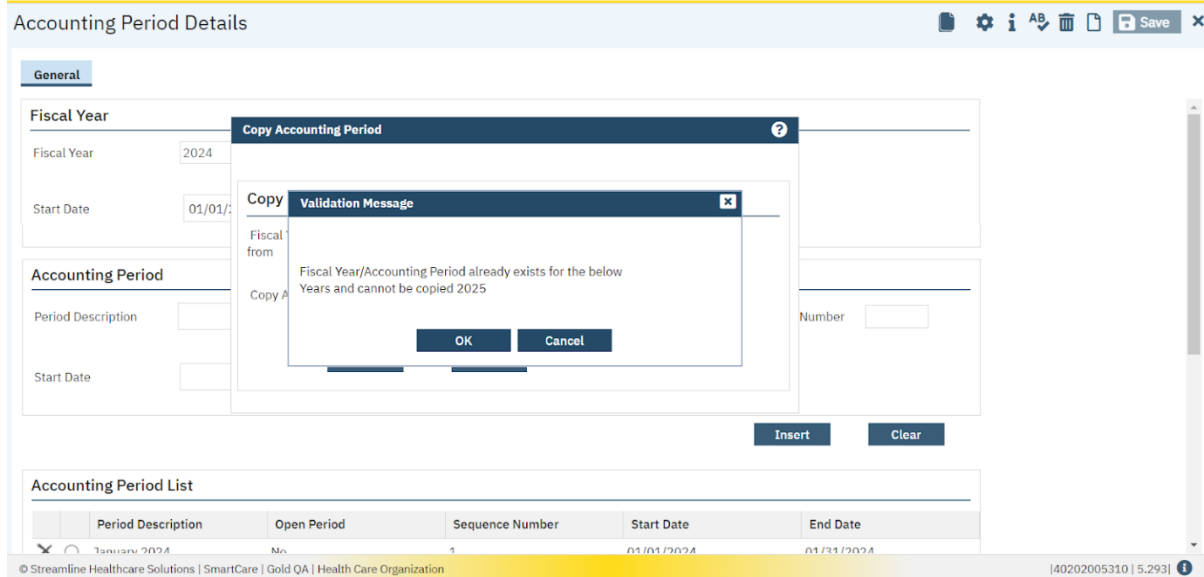
Ok: On click of OK button, the confirmation message stating that **"The Fiscal Years and Accounting Periods will be copied upto the entered Year. Do you want to proceed?"** with 'Yes' and 'No' options displayed.



The screenshot shows the 'Accounting Period Details' form with the 'General' tab selected. The 'Fiscal Year' is set to 2024 and the 'Start Date' is 01/01/2024. A 'Copy Accounting Period' dialog box is open, displaying a 'Confirmation Message' that states: 'The Fiscal Years and Accounting Periods will be copied upto the entered Year 2025. Do you want to proceed?'. The dialog has 'Yes' and 'No' buttons. Below the dialog, the 'Accounting Period List' table is visible, showing a single entry for 'January 2024'.

Period Description	Open Period	Sequence Number	Start Date	End Date
January 2024	No	1	01/01/2024	01/31/2024

Yes: Clicking on 'Yes' will copy the Fiscal Years and all the Accounting Periods up to the year mentioned in the textbox. If any Fiscal Year/Accounting Period is already present in the system, then an error validation is shown stating that **"Fiscal Year/Accounting Period already exists for the below Years and cannot be copied."**



The screenshot shows the 'Accounting Period Details' form with a 'General' tab selected. A 'Copy Accounting Period' dialog box is open, displaying a 'Validation Message' that states: 'Fiscal Year/Accounting Period already exists for the below Years and cannot be copied 2025'. The dialog has 'OK' and 'Cancel' buttons. In the background, the form shows fields for 'Fiscal Year' (2024), 'Start Date' (01/01/2024), and 'Accounting Period' (Period Description, Start Date). Below the form is an 'Accounting Period List' table with columns: Period Description, Open Period, Sequence Number, Start Date, and End Date. The table contains one row for 'January 2024' with 'No.' 1, 'Start Date' 01/01/2024, and 'End Date' 01/31/2024. The footer of the application shows '© Streamline Healthcare Solutions | SmartCare | Gold QA | Health Care Organization' and a version number '[40202005310 | 5.293]'.

Cancel: This will close the pop up.

No: Clicking on 'No' button will ensure that the Fiscal Years and Accounting Periods are not copied and the confirmation message is closed.

Accounts Receivable

Reference No	Task No	Description
3	Core Bugs # 127527	Client Accounts: Issues when regenerating a charge.

Author: Roopa Hemanna

3. Core Bugs # 127527: Client Accounts: Issues when regenerating a charge.

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

Navigation Path: Go search -- Client -- Client Accounts -- Charge/Payment Summary tab -- Click on DOS hyperlink -- Ledger Entries -- Click on Regenerate Charge.

Functionality 'Before' and 'After' release:

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

1. When the user tried to regenerate a charge for the service in the 'Ledger Entries' screen, the below error message was displayed.

Error Message: The ROLLBACK TRANSACTION request has no Corresponding BEGIN TRANSACTION.

2. The original client charge record was not deleted correctly.
3. The services were getting duplicated after 'Regenerate Charge'.

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

1. The error message is not displayed when trying to regenerate a charge for the service in the 'Ledger Entries' screen.
2. The original client charge record is deleted correctly.
3. The services are not getting duplicated after 'Regenerate Charge'.

Activity Tracker

Reference No	Task No	Description
4	Core Bugs # 127966	Flow Sheet Validation getting around.
5	EII # 127085	My Client Activities: The column header is added to the Threshold and PRN Activities section

Author: Abhishek Naik

4. Core Bugs # 127966: Flow Sheet Validation getting around.

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

Prerequisite: Activity type order is signed for a client.

Navigation Path 1: 'Client' -- 'Client Activity Tracker' -- Click on 'Activity' -- Complete the Activity by adding the health attributes.

Navigation Path 2: 'My Office' -- 'My Client Activities' -- Click on 'Activity' -- Complete the Activity by adding the health attributes.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. The system allowed user to save the Flowsheet without entering the mandatory health attributes.

With this release, the above-mentioned issue has been resolved. Now, the user will not be able to save flowsheet without entering the mandatory health attributes.

Author: Abhishek Naik

5. EII # 127085: My Client Activities: The column header is added to the Threshold and PRN Activities section.

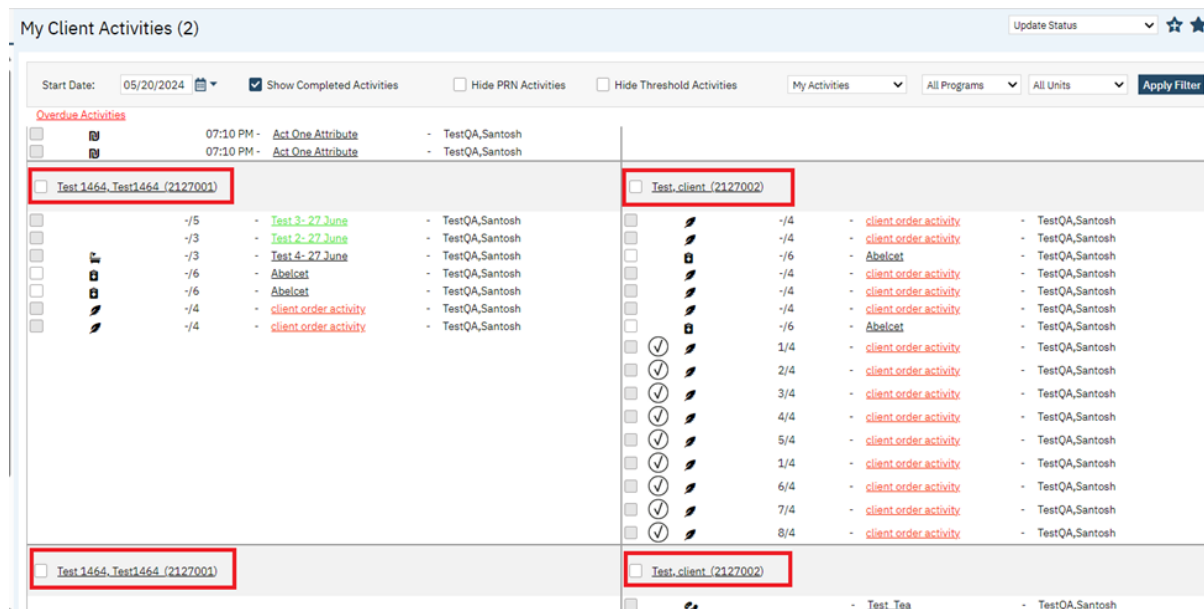
Release Type: Change | **Priority:** Urgent

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

Functionality 'Before' and 'After' release:

Purpose: The client's name will be visible in each set of activities associated to the client, which will in turn reduce the risk of data entry by the staff.

With this release, a new column header has been added to the 'Threshold' and 'PRN' activity section under the My Client Activities screen. The header is displayed with Client Name along with the Client ID. The checkbox is present beside the Client Name (Client ID) will be used to select all the activities present in the particular section.



The screenshot shows the 'My Client Activities' interface. At the top, there's a title bar 'My Client Activities (2)' with an 'Update Status' dropdown and star icons. Below it, a filter bar includes 'Start Date: 05/20/2024', 'Show Completed Activities' (checked), 'Hide PRN Activities' (unchecked), 'Hide Threshold Activities' (unchecked), and dropdowns for 'My Activities', 'All Programs', and 'All Units', followed by an 'Apply Filter' button. The main content area is divided into two columns. The left column, titled 'Overdue Activities', shows a list of activities with checkboxes, dates, and descriptions. The right column shows a list of activities with checkboxes, dates, and descriptions. Red boxes highlight specific sections in both columns, including 'Test 1464, Test 1464 (2127001)' and 'Test client (2127002)'. The bottom of the screen shows a summary row with 'Test 1464, Test 1464 (2127001)' and 'Test client (2127002)'.

Appointment Search

Reference No	Task No	Description
6	Core Bugs # 127977	Appointment Search: Not Finding Provider.

Author: Niroop Hassan

6. Core Bugs # 127977: Appointment Search: Not Finding Provider

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

Navigation Path 1: 'Client' -- 'Services' -- 'Services' list page -- Click on 'New' icon -- 'Service Details' page -- Enter the required field - select Start Time and End Time as 12am and click on 'Save' icon.

Navigation Path 2: 'My Office' -- 'My Calendar' -- 'My Calendar' page -- Click on the same Service date page -- 'New Entry Type' popup -- Select 'New Calendar Entry' and click on 'OK' button -- 'Scheduler Event' popup -- Select required fields and select 'Recurrence' checkbox -- Select 'Weekly' radio button and click on 'OK' button.

Navigation Path 3: 'My Office' -- 'Appointment Search' -- 'Appointment Search' list page.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When a recurring appointment was scheduled, the appointment was not seen in the 'Appointment Search' list page. And even when Staff had a free slot available, it was not reflecting on Appointment Search list page.

With this release, the above-mentioned issue has been resolved and now, the user is able to see the Appointments scheduled in 'Appointment Search' list page.

Batch Signature

Reference No	Task No	Description
7	EII # 127222	In the New Alerts/Message Widget - an Alert Message gets generated when a Co-Signer declines to sign a Document/Service Note from the Batch Signature screen.

Author: Suganya Sivakumar

7. EII # 127222: In the New Alerts/Message Widget - an Alert Message gets generated when a Co-Signer declines to sign a Document/Service Note from the Batch Signature screen.

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

Prerequisites:

1. A 'Service/Note' or 'Document' has a 'Co-Signer' once after signing.
2. The Co-Signer has declined to sign the 'Service/Note' or 'Document' from his Login.
3. The Alert message will be generated in the **Author Login's New Alerts/Message Widget**.

Navigation Path 1: Login as an 'Author' -- Perform Client Search -- Select a Client -- Navigate to 'Services/Notes' -- 'Client' -- 'Service/Note' List Page -- Click on 'New' Icon -- 'Service Note Detail' page -- Select 'Prog/Proc/Loc' values -- Enter all the required information -- Click on 'Save' -- 'Sign' the 'Service Note' -- In the generated PDF -- Click on ' + ' More Detail icon -- Add the 'Co-Signer' in the Signer field.

Navigation Path 2: Login as a 'Co-Signer' -- Navigate to 'Batch Signature' -- 'My Office' -- 'Batch Signature List' Page -- In the 'Document List' section -- Select to 'Co-Sign' -- Click on 'Apply Filter' -- Click on the specific document to 'Co-Sign' -- The PDF displays -- Click on the 'Decline' button -- 'Decline to Sign' popup displays -- Select the 'Reason' in the dropdown -- Click on 'OK' button.

Navigation Path 3: Login as an Author -- Navigate to 'Dashboard' -- 'My Office' -- Search for 'New Alert/Messages' widget -- In 'New Alert/Messages' widget -- 'Alert Message' displays in widget.

Functionality 'Before' and 'After' release:

Purpose: To generate an alert when a Co-Signer declines to sign a Document/Service Note as a batch.

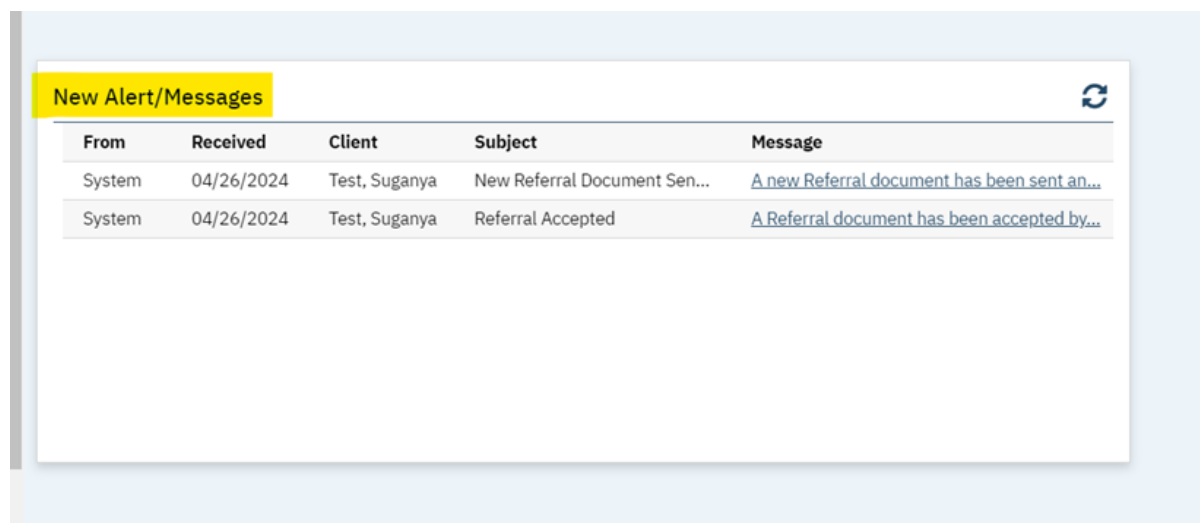
Note: This implementation will work for the customer environments who are using the custom logic.

With this release, the following changes have been implemented:

An Alert Message has been generated when the Co-Signer declines to Sign a 'Document/Service Note' from the 'Batch Signature' screen.

1. The Alert Message can be viewed by the Author of the 'Service/Note' or 'Document'.
2. In the 'New Alert/Messages' widget, the Alert Message will be displayed.

Screenshot for the 'New Alert/Messages' widget.



From	Received	Client	Subject	Message
System	04/26/2024	Test, Suganya	New Referral Document Sen...	A new Referral document has been sent an...
System	04/26/2024	Test, Suganya	Referral Accepted	A Referral document has been accepted by...

3. The Alert Message will be generated for each declined 'Document' or 'Service/Note'.
4. Once after clicking on the 'Message' hyperlink in the widget, it will be redirected to the 'Alerts' screen.
5. In the 'Alerts' List page, all the Alert Messages will be displayed.

Screenshot for the 'Alerts' Message in the 'Alerts' list Page:

Alerts (2)

Custom Date
From 04/26/2024
To 04/26/2024
All Type
Select Client
Apply Filter

	Type	Received	Clients	Subject	Follow Up	Reference
<input type="checkbox"/>	Documents	04/26/2024	Test, Suganya	Referral Accepted		Referral Docume...
<input checked="" type="checkbox"/>	Documents	04/26/2024	Test, Suganya	New Referral Document S..		Referral Docume...

Delete Checked
Forward
Delete

Details

Type Documents
Received 04/26/2024
Follow Up

To Admin, System
Client Test, Suganya
Reference [Referral Document](#)

A new Referral document has been sent and is awaiting your response. Click the document reference link to edit to respond.

Bed Census

Reference No	Task No	Description
8	Core Bugs # 128077	The error message is displayed When the user tries to open the 'Bedboard' & 'Bed Census' screen.

Author: Aishwarya Bommaklar

8. Core Bugs # 128077: The error message is displayed When the user tries to open the 'Bedboard' & 'Bed Census' screen.

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

Prerequisites:

- 'Client Flag Note' has a special character '|' in the 'Flag Details' screen.
- The Client is admitted to Bedboard.

Navigation Path 1: 'My Office' -- 'Bedboard' screen.

Navigation Path 2: 'My Office' -- 'Bed Census' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the client had a special character '|' in the 'Client Flag Note' field under the 'Client Flag' Details screen and was admitted in bed, when the user attempting to open the 'Bedboard' or 'Bed Census' screen, the below error message was displayed.

Error Message: "Syntax Error: Missing operand after 'expires' operator"

With this release, the above-mentioned issue has been resolved. Now, the user can open 'Bedboard' and 'Bed Census' screen without encountering any error message when the client had a special character '|' in the 'Client Flag Note' field.

Care Coordination

Reference No	Task No	Description
9	Core Bugs # 128135	Care Coordination: Service note not Falling Off From Care Coordination Next Step.

Author: Kiran Tigarimath

9. Core Bugs # 128135: Care Coordination: Service note not Falling Off From Care Coordination Next Step.

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

Navigation Path: 'My Office' -- 'Care Coordination Next Step' -- 'Service Note' Hyperlink -- 'Service Note (New)'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below-mentioned issues were observed in 'Care Coordination Next Step' list page.

1. When the user created service note from any other screen using disposition and navigated to the same service note from care coordination next step list page (From Next Step), the system was not opening new service note.
2. The user was redirected to Service note (New) and saved the details and navigated to Coordination next step list page, the service note record was still displaying in the list page.

With this release, the above-mentioned issue is resolved, Now,

1. When the user creates service note from any other screen using disposition and navigates the same from care coordination next step list page (From Next Step), a new service note screen will be displayed.
 2. Once after navigating to Service Note (New) and saving the details, the service note record will not display in care coordination next step list page.
-

Caseload Reassignment

Reference No	Task No	Description
10	Core Bugs # 127644	Clients are still appearing even though the clinician have been set to inactive on the client's Treatment Team.

Author: Niroop Hassan

10. Core Bugs # 127644: Clients are still appearing even though the clinician have been set to inactive on the client's Treatment Team.

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

Navigation Path 1: 'Administration' -- 'Staff/Users' -- 'Staff/Users' list page -- Click on the required Staff Name hyperlink -- 'Staff Details' page -- Click on 'Staff Preferences' tab -- Click on 'Determine Primary Caseload By' dropdown and select 'Treatment Team' as the value -- Click on 'Save' icon.

Navigation Path 2: 'Client' -- 'Treatment Teams' -- Click on 'Treatment Team Member' hyperlink -- 'Treatment Team Details' page -- Uncheck the 'Active' checkbox and click on 'Save' icon.

Navigation Path 3: 'My Office' -- 'Caseload Reassignment' -- 'Reassignment' list page.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. Even though the clinician was set to Inactive for the client's treatment team, inactive client's data was still displayed in 'Caseload Reassignment' page.

With this release, the above-mentioned issue has been resolved and now, the inactive client's data is not displayed in 'Caseload Reassignment' page.

CCD

Reference No	Task No	Description
11	EII # 127480	Persistent ID needs to be passed in the CCD file.

Author: Munish Sood

11. EII # 127480: Persistent ID needs to be passed in the CCD file.

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

Navigation Path: N/A

Functionality 'Before' and 'After' release:

With this release, implemented a unique identifier to pass as persistent ID in the CCD Xml and assigned to a data element that remains consistent when processing and generating FHIR resources.

Charges/Claims

Reference No	Task No	Description
12	Core Bugs # 128030	Removing the logic of 'Service and Charge' creation from the configuration key 'EvaluateServiceForNonBillableLocationBillingRule', to avoid extreme slowness while creating service.
13	EII # 127166	Charges/Claims List page: Added a "Reset allowed amount calculation" dropdown option to the 'Select Action' dropdown field.
14	EII # 126224	Implementing the dropdown option "Reset allowed amount calculation" for the charges in the 'Select Action' dropdown field to Reset the Expected payment and Expected Adjustment.
15	Core Bugs # 127897	Billed Date was not updated for Paper claims.
16	Core Bugs # 127930	Claim processing considering the less configuration values under 'Advanced Claim Formats for Plan' pop-up in Plan details screen.
17	Core Bugs # 127621	Implementation for sending different values for Box 1 and Box 2 for UB04 and implement field overrides for Claims Format Configurations
18	Core Bugs # 126768	Billing Rule: No More than x Contacts per period (by client)
19	Core Bugs # 128032	Charges/Claims: Performance issue while processing a large number of charges.
20	Core Bugs # 127047	New validation messages are added for void claims.
21	Core Bugs # 127508	Unable to process the 'UB04(csp_PMClaims837InstitutionalRBHS)' claims due to an error message.

Author: Yashas Kydalappa

12. Core Bugs # 128030: Removing the logic of 'Service and Charge' creation from the configuration key 'EvaluateServiceForNonBillableLocationBillingRule', to avoid extreme slowness while creating service.

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

Prerequisites:

1. The Location which are selected for providing service is "Non Billable Locations" under Rule generation section of Rules tab in Plan Detail screen.
2. The Plan which is set with "Non Billable Locations" rule is associated to the client.
3. The Configuration key "EvaluateServiceForNonBillableLocationBillingRule" value is set with Yes.

Navigation Path 1: 'Administration' -- 'Billing setup' -- 'Plans' -- 'Plans' list page -- click on the plan name hyperlink or new button -- 'Plan Details' screen -- 'Rules' tab -- 'Rule generation' section -- 'Non Billable Locations' rule.

Navigation Path 2: Client -- 'Services' -- Services list page -- click on new button 'Service Detail' screen -- Create and complete the service -- click on the 'Charge' hyperlink -- 'Ledger Entries' screen -- click on the Charge ID under grid -- 'Charge Details' screen -- 'General' tab -- 'Charge Errors' section.

Functionality 'Before' and 'After' release:

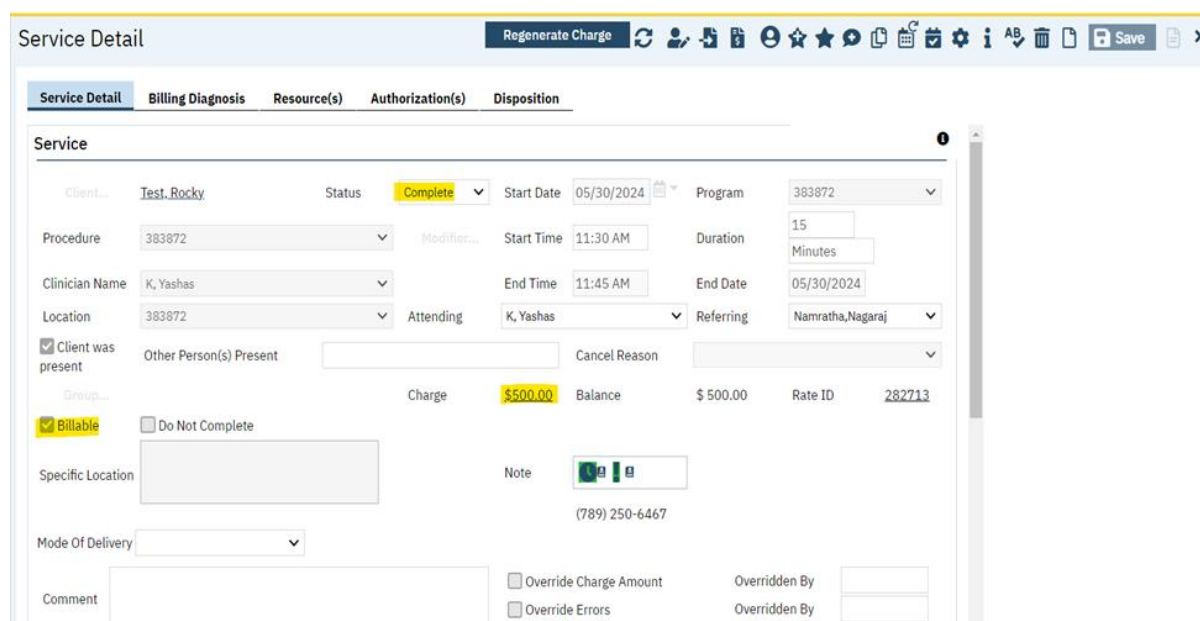
Before this release, here was the behaviour. When the configuration key value was set to 'Yes' and the service location had mapped with "Non Billable locations" rule under plan detail screen, then the below changes were happening when trying to complete the service.

- The System was showing the service validation stated as: "Service Location is Non Billable".
- The "Billable" checkbox in the service detail tab under service details screen was unchecked by default.
- The Charge ID was not created for the service even though Service Status was complete.

These issues were causing extreme slowness and eventually ended with Execution time out error in SmartCare.

With this release, the configuration key 'EvaluateServiceForNonBillableLocationBillingRule' logic has been removed to optimize the system performance. The issues are fixed as below:

- If the "Non Billable Locations" rule has been added under Plan Detail screen, then on completing the service, above mentioned service validation will not display.
- The Billable checkbox will remain checked by default.
- Charge ID is created when the Service Status is complete.



After the above issues fixes, no slowness and no execution time out error are experienced.

Author: Rinki Kumari

13. EII # 127166: Charges/Claims List page: Added a "Reset allowed amount calculation" dropdown option to the 'Select Action' dropdown field.

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

Prerequisite: A Completed service exists.

Navigation Path: 'My Office' -- 'Charges/Claims' -- filter records with the required 'Payer' or a 'Plan' -- select the required 'Charge ID' and click on the 'Select Action' dropdown field -- and select the necessary option "Reset allowed amount calculation".

Functionality 'Before' and 'After' release:

Purpose: The "Reset allowed amount calculation" dropdown Action item will allow the user to reset the allowed amount for multiple services at a time.

With this release, a new "Reset allowed amount calculation" dropdown option has been added for the charges in the 'Select Action' dropdown of the 'Charges/Claims' list page.

The "Reset allowed amount calculation" dropdown option allows the users to select charges in bulk to retroactively recalculate the allowed amount on a set of charges.

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
20952		Testing, 239195 (...)	04/04/2024 03:...	TG, Sahana	Claim Line 1 P...	\$60.00	\$60.00				
20953		Testing, 239195 (...)	04/04/2024 03:...	TG, Sahana	Claim Line 10...	\$300.00	\$300.00				
20992		Testing, 239195 (...)	04/04/2024 05:...	TG, Sahana	Aggregate Proc...	\$50.00	\$50.00				
20993		Testing, 239195 (...)	04/04/2024 07:...	TG, Sahana	IP - Hospital I...	\$500.00	\$500.00				

This "Reset allowed amount calculation" dropdown value is added to the existing core global code category '**ChargeClaimsAction**'.

Author: Rinki Kumari

14. EII # 126224: Implementing the dropdown option "Reset allowed amount calculation" for the charges in the 'Select Action' dropdown field to Reset the Expected payment and Expected Adjustment.

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

Prerequisite: A Completed service exists.

Navigation Path: 'My Office' -- 'Charges/Claims' -- filter records with the required 'Payer' or a 'Plan' -- select the required charges and click on the 'Select Action' drop-down -- and select the option "**Reset allowed amount calculation**".

Functionality 'Before' and 'After' release:

Purpose: Added a 'Select Action' dropdown option "Reset allowed amount calculation" for the charges to Reset the Expected payment and Expected Adjustment.

With this release, when the user applies the newly added option "**Reset allowed amount calculation**" for the charges, the system will perform the following actions:

a) If the charges have the 'Balance/Service' amount and when the user selects the "**Reset allowed amount calculation**" option from the "Select Action" drop-down in the 'Charges/Claims' list page for the charges, then the system will convert the 'Adjustment amount' and 'Expected amount' as a 'Service amount' and the same will be updated in the 'Charge Id' grid of the Ledger Entries' screen.

Financial Activity Line ID	Service Id	Charge Id	Date	Activity	Payer	Type	Adj. Code	Amount	Check#	Reason Codes/Desc	Remittance Advice Remark Codes/Desc
14003	104357	10298	06/06/2024	Service...	Bug-331548 A...	Cha...		\$390.00			

b) Refer to the below screenshot of the 'Ledger Entry' and 'Payments and Adjustments' of the 'Plan Details'. After executing nightly jobs and as per the prerequisite condition of 'Payments and Adjustments' in the 'Plan Details', the 'Amount' will get distributed in the 'Expected Amount' and the 'Adjustment Amount'.

Here, the Expected Payment is 5% and the Allowed Amount is 5%.

Plan Details

Without, Iop (4797)

General Billing Codes Rules Payments And Adjustments Eligible Clients Care Management Reporting Copayment Defaults Value Codes

Specified Plan ☒ Use This Plan as a Template Copy expected values from this plan

Auto Adjustment: ☒ On Charge Creation ☐ On Claim Creation Adjustment Code

Payments and Adjustments

Pay ID 1147 Billing Codes AS56788 67 66 43 56 Revenue Code ERS56788 From 05/25/2021 To

Expected Payment % 5 Allowed Amount % 5 Priority 100

Program(s)... Location(s)... Degree(s)...

Staff... Client... Service Area(s)...

☐ Client Present ☐ Client Not Present ☒ N/A Place Of Service... Procedure(s)...

Adjustment Code

☒ Show only Expected Payments and Allowed Amounts that are currently effective Copy Rate Modify Clear

Billing Code	Payment/Allowed	From	To	Program	Procedure	Location
AS56788 67 66 43...	\$/	05/25/2021				

Charge Details:

Charge Details

Without, Iop (4797)

General Contact Status History Action History

Procedure

DOS 06/06/2024 6:00 PM

Procedure Code Bug-331548 - 30.00 Minutes

Clinician Kumari, Rinki

Program Bug-331548

Location Bug-331548

Billing Code

Billing Code AS56788 Modifiers 67 66 43 56 Units 6.00

Revenue Code ERS56788 Description

Rate ID 189255 Billing Code Rate Id 189255

☐ Override Override

Financial Information

Charge \$390.00

Payer Payment

Client Copay

Expected Payment \$19.50

Expected Adjustment \$370.50

Billing History

Billed Date	Batch ID	Process ID	Processed Date	By	ClaimLineItem ID	Revenue Code	Charge Amount	BillingCode Modifiers
No data to display								

Comments

Ledger Details:

Without, Iop (4797)

Ledger Entries Make adjustment to... **Make Adjustments...** **Regenerate Charge**

Service Information
DOS: 06/03/2024 6:00 PM
Procedure: Bug-331548 30.00 Minutes
Charge: \$390.00

Payers **Modify Payer Order...** Total Current Balance : \$19.50

Payer	Charges	UnBilled	Payments	Adj	Balance
Client	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Bug-3315...	\$390.00	\$0.00	\$0.00	(\$370.50)	\$19.50

View Ledgers For : All Payers ☒ Exclude Error Ledgers

Financial Activity Line ID	Service Id	Charge Id	Date	Activity	Payer	Type	Adj. Code	Amount	Check#	Reason Codes/Desc	Remittance Advice Remark Codes/Desc
13974	104138	<u>10280</u>	06/04/2024	Adjust...	Bug-331548 A...	Adj...	CO Chr...	(\$370.50)			
13973	104138	<u>10280</u>	06/04/2024	Adjust...	Bug-331548 A...	Tra...	CO Chr...	\$390.00			
	13973	104138	<u>10281</u>	06/04/2024	Adjust...	Client	Tra...	CO Chr...	(\$390.00)		
13965	104138	<u>10281</u>	06/03/2024	FOB/P...	Client	Tra...	CO Cov...	\$390.00	JUN32...		
	13965	104138	<u>10280</u>	06/03/2024	FOB/P...	Bug-331548 A...	Tra...	CO Cov...	(\$390.00)	JUN32...	
13962	104138	<u>10280</u>	06/03/2024	Servic...	Bug-331548 A...	Cha...		\$390.00			

c) When the "Reset allowed amount calculation" option is applied for the above charge. Refer to below screenshot.

SmartCare Rinki Kumari

Charges/Claims (47)

- Activity Tracker
- Batch Service Import Fil...
- Care Coordination Next ...
- Care Coordination Refer...
- CCBHC Data Collection(C)
- CDAG Details
- Client Activity Tracker
- Client Clinical Problem...
- Clinical Data Access Gr...
- Clinical Institute Narco...
- Compliance Batch List P...
- Continuity of Care Docu...
- Crisis Call Log

All Payer Types: All Payers
All Charges (ready to bill or not): All Priorities
Show billed and unbilled charges: All Service Area
All Locations: # of client statements since charge cre...

Charge Creation From: [] Charge Creation To: []
Service ID: [] Charge ID: [] Process ID: [] Batch: []
Client ID: [] DOS From: 04/04/2024 DOS To: 04/11/2024 Processed From: 04/0...

☒ Show charges with balance ☐ Show charges with credit balance ☐ Included Error Services ☐ Show charges with balance
☐ Exclude from Work Queue ☐ Not counted toward Work Queue Productivity ☐ Show charges with balances
☐ Show \$0 Balance Paid Charges

Select Action

Add Supplemental Information

Add to External Collections

Add to Internal Collections

Adjust off the balance

Batch Update Billing Code and Revenue Code

Cascade balance to next payer

Mark as Do Not Bill

Mark as Flagged

Mark as Rebill

Mark claim line To Be Replaced

Mark claim line To Be Voided

Mark Ready to Bill

Remove Flagged

Remove from Do Not Bill

Remove from Internal Collections

Remove from Ready to Bill

Remove from Rebill

Remove from To Be Replaced

Remove from To Be Voided

Reset Allowed Amount Calculation

Select: All, All on Page, None

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
<input type="checkbox"/> 20952		Testing, 239195 (...)	04/04/2024 03:...	TG, Sahana	Claim Line 1 P...	\$60.00	\$60.00				
<input type="checkbox"/> 20953		Testing, 239195 (...)	04/04/2024 03:...	TG, Sahana	Claim Line 10 ...	\$300.00	\$300.00				
<input type="checkbox"/> 20992		Testing, 239195 (...)	04/04/2024 05:...	TG, Sahana	Aggregate Proc...	\$50.00	\$50.00				

When the user selects the "**Reset allowed amount calculation**" dropdown option from the 'Select Action' dropdown field, then the following Confirmation message popup will be displayed.

Confirmation Message: "Charges with payment cannot be recalculated" Do you want to Reset the allowed amounts for the selected record(s)? Select 'OK' to continue or 'Cancel' to exit"

Screenshot 6:

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Without, Iop (4797) Rinki Kumari

Charges/Claims (19)

Reset allowed amount calculation

Apply Filter

Charge Creation From

Service ID Charge ID

Client ID DOS From

Charges with payments cannot be recalculated

Do you want to Reset allowed amounts for the selected record(s)?
Select 'OK' to continue or 'Cancel' to exit.

OK Cancel

Select: All, All on Page, None

Charges Total \$390.00 Balance Total \$19.50

Charge ID	Plan	Client Name	DOS	Clinician	Procedure Name	Charge	Balance	Unbilled	Paid Amt	Bill Date	Flagged
10279	Bug-331548	Without, Iop (4797)	06/02/2024 07:...	Kumari, Rinki	Bug-331548	\$130.00			\$78.00	06/03/2024	
10280	Bug-331548	Without, Iop (4797)	06/03/2024 06:...	Kumari, Rinki	Bug-331548	\$390.00	\$19.50			06/03/2024	Yes
10216	CB6798 Plan	Test, CB6798 (39...	05/30/2024 08:...	Test, Roopa	CB6798 Proc	\$200.00	\$200.00			05/31/2024	
10217	CB6798 Plan	Test, CB6798 (39...	05/30/2024 10:...	Test, Roopa	CB6798 Proc	\$200.00	\$200.00			05/30/2024	

d) Once the dropdown option is applied and click on the 'OK' button in the "Reset allowed amount calculation" popup window, then the \$19.50 will be removed from the 'Charges/Claims' list page under the 'Balance' column(Refer to screenshot 6), and \$19.50 will be added to the 'Charges' column in the "Ledger Entries", now, the Balance amount will be \$390 [Adjustment amount (370.5) + Balance Amount (19.50)]

Without, Iop (4797) Rinki Kumari

Ledger Entries

Make adjustment to...

Make Adjustments... Regenerate Charge

Service Information

DOS: 06/03/2024 6:00 PM

Procedure: Bug-331548 30.00 Minu

Charge: \$390.00

Payers

Modify Payer Order...

Total Current Balance : \$390.00

Payer	Charges	UnBilled	Payments	Adj	Balance
Client	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Bug-3315...	\$390.00	\$0.00	\$0.00	\$0.00	\$390.00

View Ledgers For : All Payers

Exclude Error Ledgers

Financial Activity Line ID	Service Id	Charge Id	Date	Activity	Payer	Type	Adj. Code	Amount	Check#	Reason Codes/Desc	Remittance Advice Remark Codes/Desc
13973	104138	10280	06/04/2024	Adjust...	Bug-331548 A...	Tra...	CO Chr...	\$390.00			
13973	104138	10281	06/04/2024	Adjust...	Client	Tra...	CO Chr...	(\$390.00)			
13965	104138	10281	06/03/2024	EOB/P...	Client	Tra...	CO Cov...	\$390.00	JUN32...		
13965	104138	10280	06/03/2024	EOB/P...	Bug-331548 A...	Tra...	CO Cov...	(\$390.00)	JUN32...		
13962	104138	10280	06/03/2024	Servic...	Bug-331548 A...	Cha...		\$390.00			

Author: Sahana Gururaj

15. Core Bugs # 127897: Billed Date was not updated for Paper claims.

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

Navigation Path: 'My Office' -- 'Billing' -- 'Charges/Claims' -- 'Charges/Claims' list page --select the required ChargeId -- click on 'Paper-Claims' button -- 'Process Now' button -- 'Create Claim File' button -- 'Save As' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Billed Date' was not updated for paper claims even though those claims were billed and printed successfully.

With this release, the above-mentioned issue has been resolved, and now the 'Billed Date' will be updated for the claims that have been processed successfully without any errors/validations.

Author: Yashas Kydalappa

16. Core Bugs # 127930: Claim processing considering the less configuration values under 'Advanced Claim Formats for Plan' pop-up in Plan details screen.

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

Prerequisites:

1. Configure the respected values under 'Advanced Claim Formats for Plan' pop-up in the Plan details.
2. Configure the 'Advanced Claim Formats for Plan' pop-up details with multiple values for different claim formats.
3. Make sure that one type of claim format has more configured values when compared to other Claim formats.

The configuration in the Plan details done by following **path:**

Navigation Path 1: 'Administration' -- 'Billing setup' -- 'Plans' -- 'Plans' list page -- click on the plan name hyperlink or new button -- 'Plan Details' screen -- 'General' tab -- 'Claim Information' section -- click on the 'Advance' button under 'Standard Electronic Claim Format' drop down -- 'Advance Claim Format for Plan' pop-up.

Navigation Path 2: 'My Office' -- 'Billing' -- 'Charges/Claims' -- 'Charges/Claims' list page -- Select the Claim -- 'E-claim' button -- 'Process Now' button -- 'Create Claim File'.

Navigation Path 3: 'My Office' -- 'Billing' -- 'Charges/Claims' -- 'Charges/Claims' list page -- 'paper claim' button -- 'Process Now' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When processing the claims in the Charges/claims screen, the system was not considering the claim format which was configured with more values in 'Advanced Claim Formats for Plan' pop-up. Instead, it was considered the claim format which had been configured with less values.

With this release, the above-mentioned issue has been resolved. Now, when processing the claims in the charges/claims screen the system is considered the claim format which is configured with the more values.

Author: Rinki Kumari

17. Core Bugs # 127621: Implementation for sending different values for Box 1 and Box 2 for UB04 and implement field overrides for Claims Format Configurations.

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

Navigation Path 1: 'Administration' -- Claims Format Configurations -- Claims Format Configurations list page - click on any UB04 hyperlink ID -- Go to 'Rule' Tab -- Select value in the 'Format Fields' drop-down.

Navigation Path 2: 'Administration' -- Claims Format Configurations -- Claims Format Configurations list page - click on any 837 Institutional ID -- Go to 'Rule' Tab- Select the value in the 'Format Fields' drop-down.

Navigation Path 3: 'Client' -- 'Services' -- 'Services' list page -- Click on the 'New' icon -- Enter all the details - Complete the service.

Navigation Path 4: 'My Office' -- 'Charges/Claims' -- select the required Charge ID -- Mark as 'Ready for Bill' - apply filter -- select the 'ready for bill charge id' -- click on 'Paper Claims' icon -- click on 'Process Now' button in the 'Claim Processing' popup -- click on 'Print Claims...' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour.

- Box 2 Address was available in the 'Format Fields' drop-down of the 'Claims Format Configuration Details' screen for the UB04 paper claim.
- Box 2 Address 2 was not displaying in the UB04 paper claim file as per the setup in Claims Format rule.

With this release, the following changes have been made :

- A new value "Box 2 Address 2" in the 'Format Field' dropdown has been added in the 'Claims Format Configuration Details' screen for UB04 claim format.
- The 'Box 2 Address' has been modified to 'Box 2 Address 1' in the 'Format Field' dropdown of the 'Claims Format Configuration Details' screen for UB04 claim format.
- The Dropdown values '2010 AB -N3- Pay-To Address 1', '2010 AB -N3 -Pay-To Address 2', '2010 AB -N4 -Pay-To City', '2010 AB -N4-Pay-To State', and '2010 AB -N4 - Pay-To Zip' have been added in the 'Format Fields' dropdown of 'Rule tab' in the 'Claims Format Configuration Details' screen for 837 Institutional Claim Format.

Author: Rinki Kumari

18. Core Bugs # 126768: Billing Rule: No More than x Contacts per period (by client).

Release Type: Fixed | **Priority:** Medium

Prerequisite:

- Update the plan rule to the "No more than X contacts per period (by Client)" in plan details screen by following the below **path**:

'Administration' -- 'Plans' -- 'Plan Details' screen -- 'Rules' Tab -- select the Rule -- No more than X contacts per period (by Client) -- click on Insert -- Save.

- Enrol the same plan to the client in the "Coverage" screen by following the below **path**:

Client -- Coverage -- Select the specified rule plan -- click on save the start date, end date, COB, service area -- click on Add.

Navigation Path 1: 'Client' -- 'Services' -- 'Services' list page -- Click on the 'New' icon -- Enter all the details -- Complete the service.

Navigation Path 2: 'My Office' -- 'Charges/Claims' -- select the required Charge ID -- Mark as 'Ready for Bill' -- Apply filter -- Select the 'ready for bill charge id' -- click on 'E-Claim' button -- Click on 'Process Now' button in the 'Claim Processing' popup -- click on 'Create Claim File' button -- Click on 'Save As' button in the 'Claim File Creation' popup screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. Whenever the overnight job was executed to run the stored procedure used for validating the services based on limit, the Plan rule "No more than X contacts per period (by Client)" Was not working in the charges/claim screen.

With this release, the above issue has been resolved. Now, the mentioned rule is working even though the nightly billing job is executing for the plan rule with limit.

Author: Roopa Hemanna

19. Core Bugs # 128032: Charges/Claims: Performance issue while processing a large number of charges.

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

Navigation Path: 'My office' -- 'Charges/Claims' List Page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The users were experiencing number of performance issues i.e., execution timeouts, and claims processing hung up etc, in the 'Charges/Claims' list screen.

With this release, the above-mentioned issue has been resolved. Now, the performance is improved by optimizing the 'ssp_PMChargesAndClaims' to avoid or prevent execution timeouts and Claim processing hangs up etc, when the user processes a large number of charges under the 'Charges/Claims' screen.

Author: Sahana Gururaja

20. Core Bugs # 127047: New validation messages are added for void claims.

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

Prerequisite:

Add the 'PayerClaimNumber' to the 'Void/Replaced' claims through the below **path**:

'My Office' -- 'Charges/Claims' -- select the required billed chargeId (E-Claim or Paper Claim) --click on 'ClaimLine ItemId' hyperlink -- Claim Line Item Detail screen -- Click on Override button -- select 'To-Be Voided' and 'To-Be Replaced' check box -- save the screen -- Navigate to Claim Details sub-tab -- Enter the 'Payer Claim Number' -- Click on save and close icon -- Charges/Claims -- click on particular ChargeId -- 'Charge Details' screen -- select 'Rebill' checkbox -- save the screen.

Navigation Path: 'My Office' -- 'Charges/Claims' -- Select the Charge Id which was marked as Void and click on 'E-Claim' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When sending void claims, if the claim being billed was Electronic/Paper and the stored data on the claim was stored as Paper/Electronic, on generating claims, the claims were generated successfully without showing any validation messages.

With this release, the following new validation messages are implemented when sending void claims in the below mentioned scenarios:

Use Case 1: When the user bills an E-claims (837P or 837I) and marked the claim line as 'To Be Voided', and if user tries to bill an 'Paper' claim (UB04 or HCFA 1500), then the system will display the following validation message.

Validation Message: "Electronic Claim cannot be voided on Paper Claim".

Use Case 2: When the user bills a Paper-claims (HCFA1500) and marked the claim line as 'To Be Voided', and if the user tries to bill an 'E-Claim (837I or 837P)', then the system will display the following validation message.

Validation Message: " Paper Claim cannot be voided on Electronic Claim".

Note: The scenario of billing the 'UB04' claim and Mark it as Void -- add the PCCN number and try generating the E-claim (837 Inst and 837 Prof). The system will not throw the required validations. This will be fixed in the next upcoming builds.

Author: Sahana Gururaja

21. Core Bugs # 127508: Unable to process the

'UB04(csp_PMClaims837InstitutionalRBHS)' claims due to an error message.

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

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

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The user was unable to process the 'UB04(csp_PMClaims837InstitutionalRBHS)' claims due to the below error message.

Error Message: csp_PMClaims837InstitutionalRBHS Reports Error Thrown by: ssp_PMClaims837Validations ----
 ---->Invalid object name '#ClaimBatchVoids'.<-----
 =====
 ===== CSP_PMCLAIMS837INSTITUTIONALRBHS VARIABLE DUMP: =====
 =====
 ===== @CurrentUser:..... @ClaimBatchId:.....<20169> =====
 @AuthGrouping:..... @BatchFileNumber:..... @Bookmark:.....
 @ClaimFormatId:.....<1003> @ClaimLineId:..... @ClaimsPerClientLimit:.....
 @CurrentClientId:..... @Electronic:..... @ExecuteClaimGrouperSCSP:.....
 @ExecuteCombineChargesSCSP:..... @ExecuteOtherInsuredSCSP:..... @FormatType:.....
 @LastClientId:..... @ServiceLoopId:..... @SubscriberLoopId:....."

With this release, the above-mentioned issue has been resolved. Now, the user can process 'UB04(csp_PMClaims837InstitutionalRBHS)' claims and E-Claims successfully without any error message.

Client Account

Reference No	Task No	Description
22	Core Bugs # 128073	"Last Seen on Date" information is displaying only for Services in Show status.

Author: Rinki Kumari

22. Core Bugs # 128073: "Last Seen on Date" information is displaying only for Services in Show status.

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

Navigation Path 1: 'Client' -- 'Services' -- 'Services' list page -- Click on the 'New' icon -- Enter all the details -- Complete the service.

Navigation Path 2: Client' -- Client Account -- Go to 'Financial Summary' section -- Last seen on Date.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'Financial Summary' section of the 'Client Account' screen, the 'Last seen on date' was displayed only for Services in 'Show' status.

With this release, the above issue has been resolved. Now, the user can see the 'Last seen on Date' in the financial summary section of the client account screen for Services in 'Show' and 'Completed' statuses.

Client Flags

Reference No	Task No	Description
23	Core Bugs # 127904	PregnancyIndicator flag was ending for all the clients.
24	Core Bugs # 127845	The Flag end date is not updating, and the Flag is not deactivated.
25	Core Bugs # 127858	Records in the client flag list page were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank in ClientNotes table.

Author: Girish Jayanna

23. Core Bugs # 127904: PregnancyIndicator flag was ending for all the clients.

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

Navigation Path: Go Search -- Client Flags (Client).

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. PregnancyIndicator flag was ending for all clients when the Pregnant field was marked as No or NA in the Demographics tab of the Client information screen.

With this release, the above mentioned issue has been resolved. Now, the flag will end only for specific client when the Pregnant field is marked as No or NA in the Demographics tab of the Client information screen.

Author: Girish Jayanna

24. Core Bugs # 127845: The Flag end date is not updating, and the Flag is not deactivated.

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

Navigation Path: 'Client' search -- 'Client Flags' -- 'Client Flag Details'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Tracking Protocol Detail' screen includes an "End Protocol" dropdown field with the option 'on episode discharge'. When a client was discharged from their client episodes, the tracking protocol's flags were getting inactive for clients who were discharged from the 'Client Episode' screen. However, when the client was released from the 'Agency/Program Discharge document' by the user, the flag was not ended.

With this release, the above-mentioned issue has been resolved. Now, the logic has been modified to end the flag when the client is discharged from the 'Agency/Program Discharge' document.

Author: Girish Jayanna

25. Core Bugs # 127858: Records in the client flag list page were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank in ClientNotes table.

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

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

Prerequisites:

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

Navigation Path: Client Search -- 'Client Flag' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The records in the Client Flag list page were getting listed irrespective of the CDAG rule, when the records don't have 'ClientProgramId' field values present in ClientNotes table.

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

1. Now, If the 'ClientProgramId' field value is not present, then it will consider the 'ProgramId' field value. The records will be displayed based on the programs associated with the logged in user's Clinical Data Access Group.
2. If a ProgramID is used to display the records on the list page (when no ClientProgramID is associated with it), the Program field on the detail page is NULL so that the user can select the correct Program value to update the record.

Client Information(C)

Reference No	Task No	Description
26	Core Bugs # 127856	Client age is not calculated correctly in Client Search information hover.
27	Core Bugs # 127905	Client Information: 'Comments' field was not accessible in Financial Tab.

Author: Rakesh Naganagoda

26. Core Bugs # 127856: Client age is not calculated correctly in Client Search information hover.

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

Navigation Path: Login to SmartCare -- 'Client Search' and select a client -- Hover on the client's name in the header.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user hovers the mouse on the Client Search information, client's age was showing incorrect i.e. if date of birth falls on the next day, it calculates the previous day as the year.

Example: If the date of birth of the client is '03/27/1963' and for '03/27/2024' client age becomes 61. But the application is calculating client age as 61 on previous day i.e. 03/26/2024 itself.

With this release, the above-mentioned issues have been resolved. Now the client's age is correctly calculating and displaying on mouse hovering on the Client Search information.

Author: Praveen Gangadhara

27. Core Bugs # 127905: Client Information: 'Comments' field was not accessible in Financial Tab.

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

Navigation Path: Client -- Client Information -- Navigate to 'Comments' field in the Financial tab.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the 'Client Information' screen, under the Financial tab, the Comments field was disabled and hence the user was not able to access the 'Comments' field.

With this release, the above-mentioned issue has been resolved. Now in the 'Client Information' screen, the users can access and add data into the 'Comments' field.

Client Inquiries

Reference No	Task No	Description
28	Core Bugs # 128072	Error information is not captured if any error occurred while opening Inquiry-New Client.
29	Core Bugs # 125647	Inquiry details screen: On selection of 'Register Client' button, the user was unable to navigate to the registration document.

Author: Sunil Belagali

28. Core Bugs # 128072: Error information is not captured if any error occurred while opening Inquiry-New Client.

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

Navigation Path: Client Search -- Inquiry (New Client)

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user tried to create a new Client Inquiry, if any error occurred, it was not captured into the ErrorLog table.

With this release, the above-mentioned issue has been resolved. Now, the logic is added to capture error information if any errors occurs when the user tries to create a new Client Inquiry.

Author: Savitha Siddaraju

29. Core Bugs # 125647: Inquiry details screen: On selection of 'Register Client' button, the user was unable to navigate to the registration document.

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

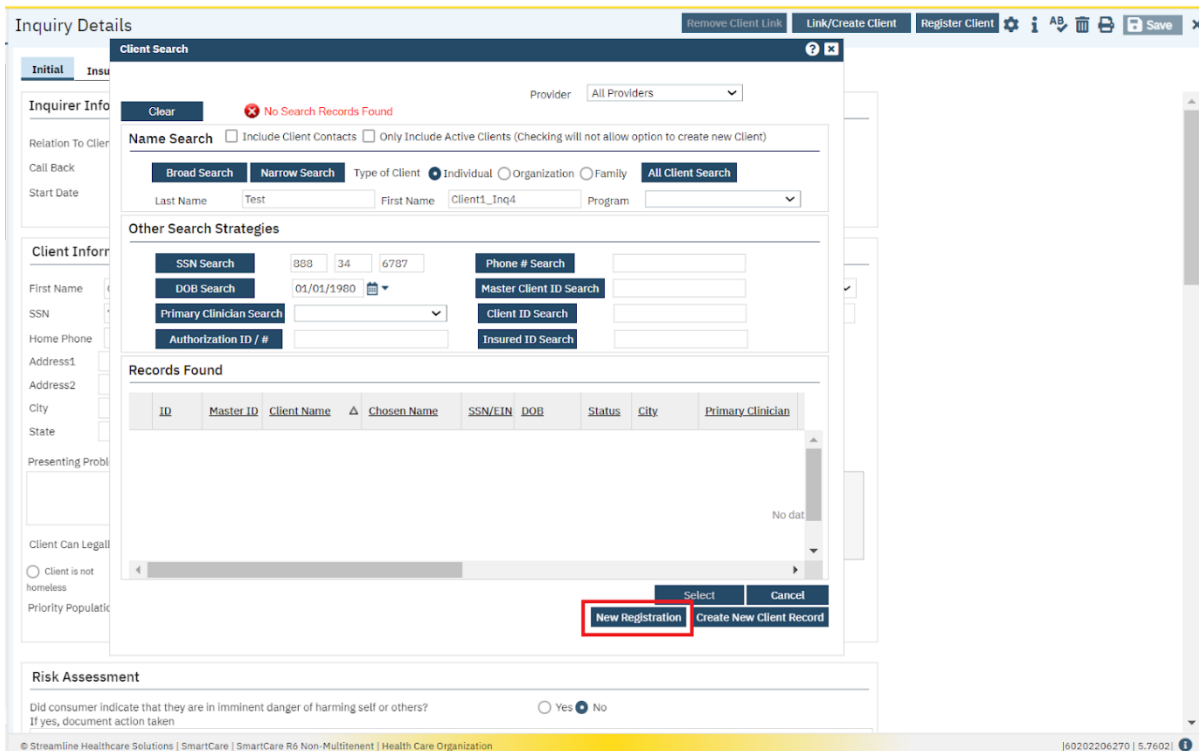
Navigation Path 1: 'Client search pop-up' -- 'Inquiry (New Client)' -- 'Inquiry details' screen -- 'Link/Create client' or 'Register Client' button -- 'Client search' popup -- perform 3 way search -- click on 'New Registration' button.

Navigation Path 2: 'My Office' -- 'Inquiries' list page -- click on 'New' icon -- 'Inquiry details' screen -- 'Link/Create client' or 'Register Client' button -- 'Client search' popup -- perform 3 way search -- click on 'New Registration' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Inquiry details screen, on click of the 'Register Client' button, the user was unable to navigate to the registration document unless a client was created and linked to the inquiry record.

With this release, the above-mentioned issue has been resolved. Now, a "New Registration" button is added in the client search popup whenever the user clicks on the 'Register Client' or 'Link/Create Client' button under the Inquiry details screen. Upon selection of the "New Registration" button, the system will create a client id and link to the inquiry record after that automatically navigate to the registration document.



Note: In Client search popup, the "Create New Client Record" button will be maintained with existing behavior.

Client MAR

Reference No	Task No	Description
30	Core Bugs # 127980	Client MAR: The Gray tick mark is not displayed for past due medications if medication is not administered.
31	Core Bugs # 128019	Client MAR: Orders with flowsheets that are completed via MAR are losing answers to the flowsheet questions after save

Author: Chaithali Patil

30. Core Bugs # 127980: Client MAR: The Gray tick mark is not displayed for past due medications if medication is not administered.

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

Navigation Path 1: Go to search -- Orders (Admin) -- Click on 'New' -- Select order type as 'Medication' -- under the option section (select Add order to MAR Radio button) -- Enter all the required fields -- Click on 'Save'

Navigation Path 2: Perform 'Client search' -- Go search -- Client Order (Client) -- Click on 'New' -- search for (Navigation Path 1) order -- Fill all required fields -- Insert order in the grid -- Click on 'Save' -- Sign the 'Client Order'

Navigation Path 3: Perform 'Client search' -- Go search -- Client MAR (client) --and verify 'Medication' has been scheduled for respective time and 'Grey tick' icon is displayed -- Do not administer the 'Medication' -- after 24 hrs. Again filter for past date select shift and check 'Grey tick' icon should be displayed for past date if the medication is not administer.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Client MAR screen, the grey tick icon was not displayed for past due medications if medication was not administered.

With this release, the above mentioned issue has been resolved. Now, in the Client MAR screen, the grey tick icon is displaying for past due medications if medication is not administered.

Author: Madhu Basavaraju

31. Core Bugs # 128019: Client MAR: Orders with flowsheets that are completed via MAR are losing answers to the flowsheet questions after save.

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

Prerequisite 1: Order is created by adding two or more Questions under 'Add Flow sheet' 'Answer Type' by selecting 'Administration' for 'Show question at the time of' under 'Admin'.

Prerequisite 2: Client Order is signed for the Order created in **Prerequisite 1**

Navigation Path: 'Client' -- Client MAR -- Click on Overdue hyperlink -- Click on 'Date' hyperlink from the 'Overdue Items' for the Client Order signed (in Prerequisite 2) -- 'MAR Details' editing popup -- Enter the details under 'Additional Question' -- update 'Administration Status' as Completed -- Save -- Filter the Date and Time Administered -- Click on 'Time' hyperlink in the grid.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Client 'MAR Details' popup, Orders with flowsheets that were completed with answers, some of the answer fields are displayed blank after saving.

With this release, the above mentioned issues have been resolved. Now, Orders with flowsheets that are completed with answers via MAR, all the answers are displaying after saving.

Client Order

Reference No	Task No	Description
32	Core Bugs #127195	Client Orders list page: The Lab order 'Clinic/Location' is converting/changing to the wrong clinic location.
33	Core Bugs # 127876	Client Orders / The Ordering Physician information showing in the PDF that is not correct
34	Core Bugs # 128011	Barcode pdf is displayed blank in the 'Results and Requisitions popup' while clicking on the BarCode Scan icon.
35	Core Bugs # 127972	User not able to sign the Client Orders due to validation
36	Core Bugs # 128065	Client Orders/Detail page: The 'Comments' popup failed to open due to the presence of line break statements in the comments text.
37	EII # 125596	Implementation of Client Medication Interactions
38	Core Bugs # 128150	Modified Date/Time is not displayed in the Client Orders PDF.
39	EII # 127070	User Cannot determine Parent Order ID from 'Client Order selection' pop-up
40	EII # 126799	Implementation to add Lab Test Results section in Documents and Service Notes
150	Core Bugs # 128137	Display issue in Client Order detail screen.

Author: Munish Sood

32. Core Bugs # 127195: Client Orders list page: The Lab order 'Clinic/Location' is converting/changing to the wrong clinic location.

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

Navigation Path: 'Client' search -- 'Client Orders'-- 'Client Orders' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Clinic/Location' information was not displaying in the 'Client Orders' list page when the user received unsolicited lab results for clients.

With this release, the above-mentioned issue has been resolved. The 'Clinic/Location' information is now displayed even when the user receives unsolicited lab results without 'Clinic/Location'. Additionally, the system now matches the 'Clinic/Location' with the Quest account number and displays it in the 'Client Orders' list page.

Author: Chaitali Patil

33. Core Bugs # 127876: Client Orders / The Ordering Physician information showing in the PDF that is not correct.

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

Navigation Path 1: 'Go to search' -- 'Orders (Admin)' -- Click on 'New' -- 'Select any order type' -- fill all required fields' -- Click on 'Save'.

Navigation Path 2: Perform 'Client search' -- Go search -- Client Order (Client) -- Click on 'New' -- search for (Navigation Path 1) order -- select 'Ordering Physician' -- fill all required fields -- insert order in the grid -- Click on 'Save' -- Sign the 'Client Order' -- check 'Ordering Physician' name in the pdf.

Navigation Path 3: Perform 'Client search' -- Go search -- Client Order (Client) -- Click on 'New' -- Client Order Selection Pop up will be open from this pop up -- select (Navigation Path 2) signed order for modification -- Click on 'Ok' -- Order details will be open -- select the order from grid -- check the discontinue check box -- and discontinue reason -- Select different 'Ordering Physician' -- Click on insert Click on 'Save' -- Sign the 'Client Order' -- in the PDF who is originally ordered the medication that 'Ordering Physician' name is displayed.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. After discontinuing the order, the correct 'Ordering Physician' name was not displaying in the 'Client Order' PDF (who originally ordered the medication). It was changing to the person who is discontinued the order.

With this release, the above-mentioned issue has been resolved. Now, after discontinuing the order, the correct 'Ordering Physician' name is displaying in the 'Client Order' PDF (who originally ordered the medication). It is not changing to the person who is discontinuing the order.

Author: Chaitali Patil

34. Core Bugs # 128011: Bar code pdf is displaying blank in the 'Results and Requisition popup' while clicking on the BarCode Scan icon.

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

Navigation Path 1: 'Administration' -- 'Orders' -- Click on 'New' -- 'Order Details' -- Select 'Order Type' as 'Labs' -- do not select 'Laboratories' -- 'fill others required fields' -- Click on 'Save.'

Navigation Path 2: 'Client' -- 'Client Orders' -- Click on 'New' -- 'search for (Navigation Path 1) order' -- 'fill all required fields' -- 'insert order in the grid' -- Click on 'Save' -- Sign the 'Client Order' -- Navigate back to 'Client Orders' List page -- check the checkbox for signed lab order and click on 'BarCode Scan' Icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the Client Orders list page, when the user clicked on 'BarCode Scan' icon for the lab orders which were having the 'Null Laboratory ID', then the Barcode pdf was displayed blank in the 'Results and Requisitions popup'. Also, it was not displaying any validation message.

With this release, the above-mentioned issue has been fixed. Now, when the BarCode Scan icon is clicked in the Client Orders list page for those order which is having the 'Null Laboratory ID', the below mentioned validation message will be displayed for the Barcode pdf in the 'Results and Requisitions popup'

Validation message: No Barcode for the selected Order(s).

Author: Munish Sood

35. Core Bugs # 127972: User not able to sign the Client Orders due to validation.

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

Navigation Path 1: 'Client' -- 'Client Information' -- 'Save'.

Navigation Path 2: 'Client' -- 'Finance' -- 'Coverage'.

Navigation Path 3: 'Client' -- 'Client Orders' -- 'New Order' -- 'Click on Validate Icon/Sign'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour.

As part of LabCorp Interface, the users were not able to sign the Client Orders unless the user fills the data in all the required fields under the Client Information screen and if the Coverage Plan information associated with the client does not have a Claim Address.

With this release, now, the users are able to sign the Client Order without data in the required fields under the Client Information screen and the system is not displaying the below warning messages so that users can sign the Client Order without fulfilling those warning messages. Below mentioned warning messages are displayed in client order screen only if the current Order belongs to LabCorp direct interface when the user tries to sign the client order.

- 1.'Labcorp requires Client Address under "General" tab on the Client Information screen'
- 2.'Labcorp requires Client City under "General" tab on the Client Information screen'
- 3.'Labcorp requires Client State under "General" tab on the Client Information screen'
- 4.'Labcorp requires Zip Code under "General" tab on the Client Information screen'
- 5.'Labcorp requires Client Phone Number under "General" tab on the Client Information screen'
- 6.'Labcorp requires Client Sex under "Demographics" tab on the Client Information screen'
- 7.'Labcorp requires Client Ethnicity under "Demographics" tab on the Client Information screen'
- 8.'Labcorp requires Client Race under "Demographics" tab on the Client Information screen'
- 9.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: Relationship under "Contacts" tab on Client Information screen'
- 10.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: Full Address under "Contacts" tab on Client Information screen'
- 11.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: City under "Contacts" tab on Client Information screen'
- 12.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: State under "Contacts" tab on Client Information screen'
- 13.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: Zip Code under "Contacts" tab on Client Information screen'
- 14.'Labcorp requires a contact person identified as "Next of Kin" if client is < 18 years. Including: Home Phone Number under "Contacts" tab on Client Information screen'
- 15.'Labcorp requires a Financially Responsible person on client contacts including: Relationship under "Contacts" tab on Client Information screen'
- 16.'Labcorp requires a Financially Responsible person on client contacts including: Full Address under "Contacts" tab on Client Information screen'
- 17.'Labcorp requires a Financially Responsible person on client contacts including: City under "Contacts" tab on Client Information screen'
- 18.'Labcorp requires a Financially Responsible person on client contacts including: State under "Contacts" tab on Client Information screen'
- 19.'Labcorp requires a Financially Responsible person on client contacts including: Zip Code under "Contacts" tab on Client Information screen'
- 20.'Labcorp requires a Financially Responsible person on client contacts including: Phone Number under "Contacts" tab on Client Information screen'

21.'Labcorp can have only one "CourtesyCopy" information under "Interface" tab on the Client Information screen'

22.'Labcorp requires Client must have a financially responsible person identified. This can be either the client him/herself on Client Information screen or under Contacts tab on Client Information screen'

And also, below Validation messages will display if the Client Bill is Third Party ('T') and coverage plan is associated with client and does not have the required information as mentioned below:

1. LabCorp requires CoveragePlan Name to be present.
2. Labcorp requires a Claims Address on the Coverage Plan "" + CP.DisplayAs + "" associated with client'
3. Labcorp requires a Claims City on the Coverage Plan "" + CP.DisplayAs + "" associated with client'
4. Labcorp requires a Claims State on the Coverage Plan "" + CP.DisplayAs + "" associated with client'
5. Labcorp requires a Claims Zip on the Coverage Plan "" + CP.DisplayAs + "" associated with client'
6. LabCorp requires Insured Id on the Coverage Plan "" + CP.DisplayAs + "" associated with client'

After adding the values for the Coverage Plan, the users will be able to sign the LabCorp Client Order.

Author: Chaitali Patil

36. Core Bugs # 128065: Client Orders/Detail page: The 'Comments' popup failed to open due to the presence of the line break statements in the comments text.

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

Navigation Path 1: 'Go to search' -- 'Orders (Admin)' -- Click on the 'New' icon -- 'Select any order type' -- Under the 'Option' section select the Radio button for "Order Comments" -- 'fill all required fields' -- Click on 'Save'.

Navigation Path 2: Perform 'Client search' -- 'Go search' -- 'Client Order (Client)' -- Click on 'New' icon -- 'search for (Navigation Path 1) order' -- add comment text with line break statements in the 'Comment' box -- 'fill all required fields' -- 'Insert order' in the grid -- Click on 'Save' -- Sign the 'Client Order' -- Navigate back to 'Client Order' List page -- click on the 'Comment' icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. The 'Comments' popup failed to open when the 'Comments' icon in the 'Client Orders' list page was clicked, due to the presence of line break statements in the comments text.

With this release, the above-mentioned issue has been fixed. Now, the 'Comments' popup opens when the 'Comments' icon is clicked, even if the comments text contains line break statements. The issue has also been resolved in the Order/rounding (My Office) and Order/rounding (Client) screens.

Author: Shivakanth Moger

37. EII # 125596: Implementation of Client Medication Interactions

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

Prerequisite: 'Login to SmartCare Application' -- 'Client' -- 'Medication Management Rx' link -- 'Rx Application' - - 'Patient Summary' screen' -- 'New Order button' -- 'New Medication Order Page' -- 'Add/prescribe the medication which is having interaction'.

Navigation Path: 'Select any client' -- 'Go search' -- 'Client Orders' -- 'New' -- 'Client Order' screen -- 'search for any medication which is having interaction in the RX added in the Prerequisite'.

Functionality 'Before' and 'After' release:

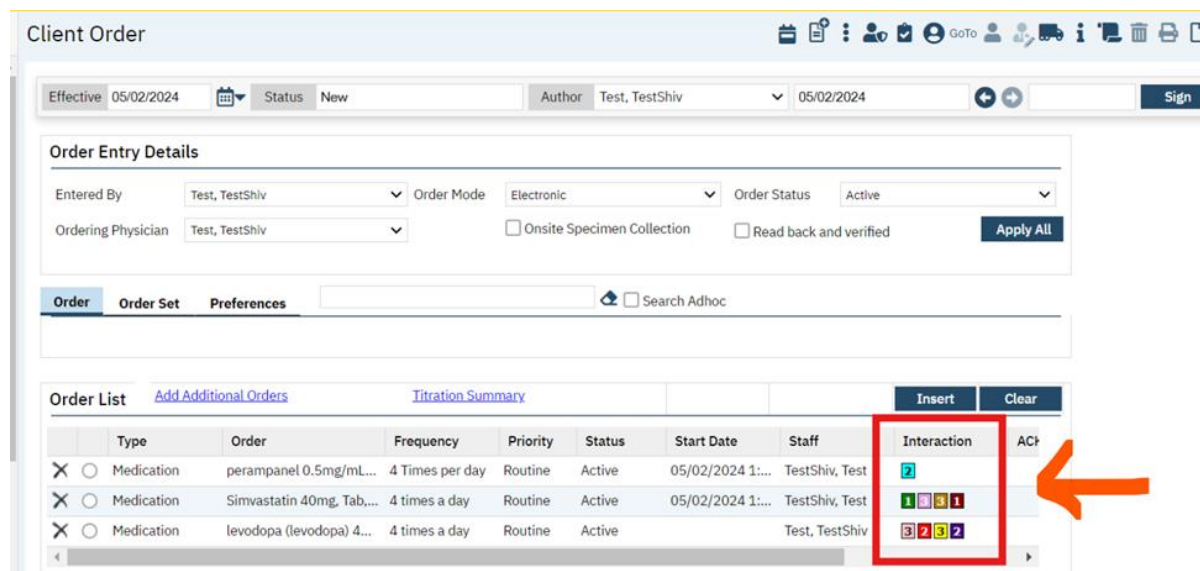
Purpose: Currently, the 'Drug Interactions are only working correctly in Rx and do not work correctly with Orders. This implementation is done to ensure that 'Interactions will work in Client Orders exactly as they do in Rx and will work with 'Other' strength.

With this release, the Interaction logic is added in the Client Orders screen to display all interactions between currently prescribed medications in RX and active medications in Client Orders.

Scenario:

When the user adds any medication in SmartCare, if that medication is having interaction with any medication which is added in the RX, then on click of insert, the interaction level will be displayed in the Client Order's 'Order list' grid.

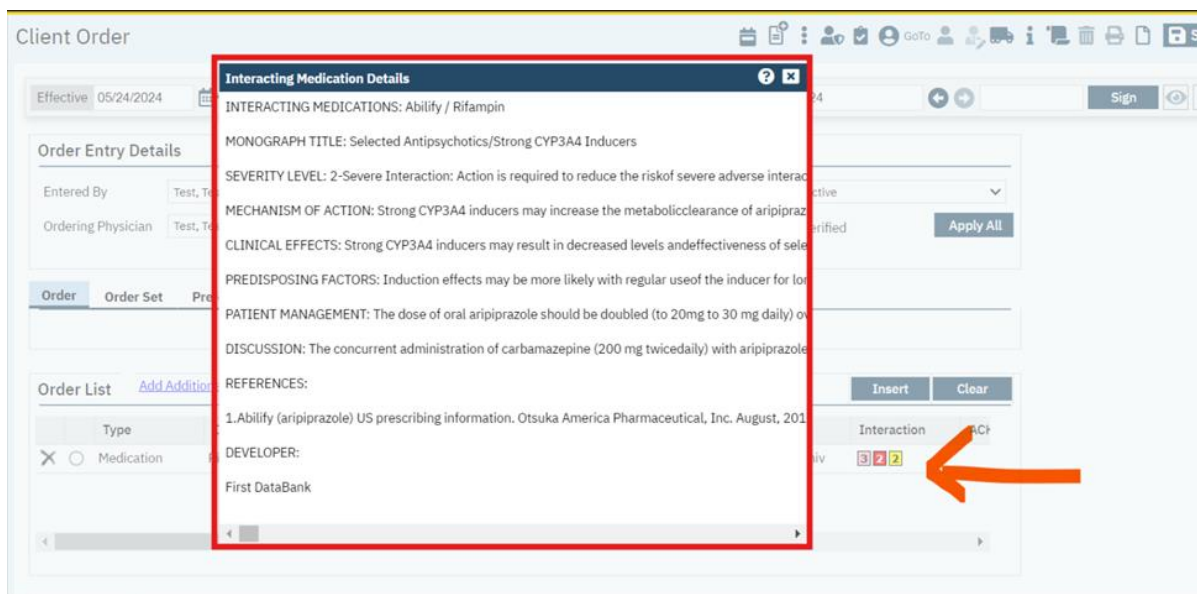
The interaction level will be displayed in the Order List grid as mentioned below: Interaction level(numbers) and Color.



The screenshot shows the 'Client Order' interface. At the top, there's a header with 'Client Order' and various icons. Below that, there's a section for 'Order Entry Details' with fields for 'Entered By', 'Order Mode', 'Order Status', 'Ordering Physician', 'Onsite Specimen Collection', and 'Read back and verified'. Below this is the 'Order List' section, which has tabs for 'Order', 'Order Set', and 'Preferences'. The 'Order List' table has columns: Type, Order, Frequency, Priority, Status, Start Date, Staff, and Interaction. The 'Interaction' column shows colored boxes with numbers representing interaction levels. A red box highlights the Interaction column, and an orange arrow points to it.

Type	Order	Frequency	Priority	Status	Start Date	Staff	Interaction
Medication	perampanel 0.5mg/mL...	4 Times per day	Routine	Active	05/02/2024 1:...	TestShiv, Test	2
Medication	Simvastatin 40mg, Tab,...	4 times a day	Routine	Active	05/02/2024 1:...	TestShiv, Test	1 1 3 1
Medication	levodopa (levodopa) 4...	4 times a day	Routine	Active		Test, TestShiv	3 2 3 2

Clicking on the Interaction icon will open the Interacting Medication Details pop up as shown below:



Clicking on Close (X) icon will close the Interacting Medication Details pop up window.

Data Model Change: ClientMedicationId and OrderMedicationIdList columns are added in ClientOrdersInteractionDetails table.

Author: Sithara Ponnath

38. Core Bugs # 128150: Modified Date/Time is not displayed in the Client Orders PDF.

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

Navigation Path: 'Client' -- 'Client Orders' screen -- Search and select an order which has 'Question' section -- Enter required data -- Go to 'Question' section -- Enter Date and Time -- Click on 'Insert' button -- Click on 'Sign' button -- Click on 'New' icon -- Select the signed order from the Order Selection pop-up -- Select the radio button of the order in the 'Order List' grid -- Modify the Date and Time -- Click on 'Modify' button -- Click on 'Sign' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user modified the Date and Time in the Client Orders, the modified Date and Time was not displayed on the signed Client Order PDF document.

With this release, the above-mentioned issue has been Resolved. Now, the modified Date and Time is displaying on the signed Client Order PDF document.

Author: Abhishek Naik

39. EII # 127070: User Cannot determine Parent Order ID from 'Client Order selection' pop-up.

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

Navigation Path: 'Client' -- 'Client Orders' -- 'New' icon -- 'Client Order selection' pop-up.

Functionality 'Before' and 'After' release:

Purpose: The users will be able to easily know which recurring orders to modify when they need to make a change to the original Parent Order.

With this release, the below changes are implemented in the 'Client Order selection' pop-up:

- New columns 'Order ID' and 'Parent Order ID' are implemented in the Client Order selection pop-up. The user will be able to determine the Parent Order ID for the recurring orders.
- When there are Child Orders for an associated Parent Order, then Parent Order will be listed as below, followed by associated Child Orders.

Client Order Selection Popup

?

x

Orders Being Modified/Discontinued

Please select the orders you wish to modify or discontinue. Do not need to select any if you are just creating new orders.

<input type="checkbox"/>	Order ID	Order	Type	Start Date	Frequency	Status	Ordering Physicia
<input type="checkbox"/>	3632	Blood Culture, Routine	Labs	06/15/2023 10:00 AM	Weekly	Sent To Lab	Admin, System
<input type="checkbox"/>	3635	Hemoglobin new	Labs	06/15/2023 02:04 PM	Weekly -Lab	Active	Admin, System
<input type="checkbox"/>	3637	Blood Culture, Routine...	Labs	06/22/2023 12:00 AM	Weekly	Active	Admin, System
<input type="checkbox"/>	3638	Hemoglobin new	Labs	06/22/2023 12:00 AM	Weekly -Lab	Active	Admin, System
<input type="checkbox"/>	3748	Children's Tactinal windo...	Medication	06/26/2023 03:16 PM	Window 5 times	Active	Admin, System
<input type="checkbox"/>	3749	Dihydroxyacetone windo...	Medication	06/26/2023 01:00 AM	window alter d...	Active	Admin, System

OK

Cancel

Other Current Meds

Type	Order	Start Date	Frequency	Status	Ordering Physician	Assigned To
No data to display						

Client Order Selection Popup

Orders Being Modified/Discontinued

Please select the orders you wish to modify or discontinue. Do not need to select any if you are just creating new orders.

Start Date	Frequency	Status	Ordering Physician	Assigned To	Parent Order ID
06/15/2023 10:00 AM	Weekly	Sent To Lab	Admin, System		
06/15/2023 02:04 PM	Weekly -Lab	Active	Admin, System		
06/22/2023 12:00 AM	Weekly	Active	Admin, System		3632
06/22/2023 12:00 AM	Weekly -Lab	Active	Admin, System		3635
06/26/2023 03:16 PM	Window 5 times	Active	Admin, System		
06/26/2023 01:00 AM	window alter d...	Active	Admin, System		

OK Cancel

Other Current Meds

Type	Order	Start Date	Frequency	Status	Ordering Physician	Assigned To
No data to display						

Author: Abhishek Naik

40. EII # 126799: Implementation to add Lab Test Results section in Documents and Service Notes.

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

Prerequisites:

1. Lab order is signed.
2. Results are added in the Lab Results tab of Lab through the **path:**

Client Orders -- Click on Lab Order Name hyperlink -- 'Lab Results' tab -- Add the Observations.

Navigation Path 1: 'Administration' -- 'Recode' -- Category Code/Category Name: '**LABTYPEEXTERNAL**' -- click on hyperlink -- 'Recode Details' -- Add 'Code Name', 'Start Date', and 'Integer Code Id' -- click on 'Insert' and 'Save' button.

Navigation Path 2: 'Client' -- 'Documents' -- 'New' icon -- 'Lab Test Results' section.

Navigation Path 3: 'Client' -- Services/Notes -- 'New' icon -- Enter the details in service tab -- Note tab -- 'Lab Test Results' section.

Note: In the Documents, Lab Test Results section will be displayed based on the Set up, this will be done by the development based on the request.

Functionality 'Before' and 'After' release:

Purpose: The customers will be able to set- how many days of Lab Results data to show on each document.

With this release, the following features have been implemented.

1. A new Recode Category Code/Category Name: "**LABTYPEEXTERNAL**" is implemented. The labs which are added under this recode category will be considered as External Labs.

Note: Mapping Entity: Laboratories – LaboratoryId

Recodes

Category

Category Code

LABTYPEEXTERNAL

Category Name

LABTYPEEXTERNAL

Mapping Entity

Laboratories - LaboratoryId

Description

To determine which lab orders are considered External Lab Type.

Recode Details

Code Name

LabCorp

Start Date

07/21/2023

End Date

12/02/2024

Character Code Id

Integer Code Id

2

Modify

Clear

Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
X	LabCorp	07/21/2023	12/02/2024		2

Psychiatric Note

Effective 05/30/2024 Status New Author Naik, Abhi 05/01/2024

Service Note Billing Diagnosis Add-On Codes Resource Warnings Attachment(s) Disposition Encounter Form

General MSE Medical Decision Making AIMS Diagnosis Psychotherapy History and Physical

Lab Test Results

Refresh

Ordered Date	Result Date	Lab Type	Order Name	Observation	Value	Obs Value Hx	Range	Flag	Reviewed By	Reviewer Comments
05/24/2024	05/01/2024	Internal	Lab Observation	GLUCOSE	11	⌚		High	Naik, Abhi	Reviewer CommentsReviewer CommentsR...
05/26/2024	05/01/2024	Internal	CARBAMAZEPINE, FREE	CARBAMAZEPINE, FREE	01	⌚	1.0-3.0	High	Naik, Abhi	Test Comment
05/26/2024	05/01/2024	Internal	CARBAMAZEPINE, FREE	CARBAMAZEPINE, FREE	02	⌚	1.0-3.0	Hogh High	Naik, Abhi	Test Comment
02/19/2024	04/02/2024	External	1,3 Dichlorobenzene, Serum	1,3 Dichlorobenzene, Serum	5	⌚		t		sssss
05/24/2024	04/01/2024	Internal	Lab Observation	GLUCOSE	22	⌚		Onfire	Naik, Abhi	Reviewer CommentsReviewer CommentsR...

- Lab Test Results for the past 180 days from the effective date of the Document and Service Notes will be displayed for the client.
- The users will be able to customize the number of days for External and Internal Lab in the Document codes screen. (This is implemented in Feature: 338701, EI: 126800)
- Lab Test Result data will reflect on the Document and Service Notes PDF on signing the document and Service Notes.
- The Records will be sorted based on the newest Result date added in the Lab Results tab of Lab orders.

Example: If the Lab Results dates are on 04/01/2024, 05/01/2024 and 03/01/2024, then the sorting will be 05/01/2024, 04/01/2024 and 03/01/2024 in the Lab Test Results section.

Lab Test Results section:

The below mentioned details will be displayed in the Lab Test Results section:

PHQ9

Effective 04/01/2024 Status In Progress Author Naik, Abhi 04/01/2024

PHQ9

Lab Test Results

Refresh

Ordered Date	Result Date	Lab Type	Order Name	Observation	Value	Obs Value Hx	Range	Flag	Reviewed By	Reviewer Comments
05/24/2024	04/01/2024	Internal	Lab Observation	GLUCOSE	22	⌚		Onfire	Naik, Abhi	Reviewer CommentsReviewer CommentsR
10/27/2023	03/11/2024	Internal	CBC (INCLUDES DIFF/PLT)	MCV	6	⌚	80.0-100.0	jjjj		
05/24/2024	03/01/2024	Internal	Lab Observation	GLUCOSE	33	⌚		Urgent	Naik, Abhi	Reviewer CommentsReviewer CommentsR
05/26/2024	03/01/2024	Internal	CARBAMAZEPINE, FREE	CARBAMAZEPINE, FREE	02	⌚	1.0-3.0	Low	Naik, Abhi	Test Comment
02/19/2024	02/20/2024	External	1,3 Dichlorobenzene, Serum	1,3 Dichlorobenzene, Serum	25	⌚		N		
02/19/2024	02/20/2024	External	1,3 Dichlorobenzene, Serum	1,3 Dichlorobenzene, Serum	35	⌚		N		

Refresh button: When user clicks the Refresh button, the entries will be updates as of today's date. And the entries will be updated to the effective date of the document.

Ordered Date: Date of the Order creation will be displayed. Only the records with 180 back days from the effective date of the document will be displayed.

Result Date: Result date added in the Lab results tab of Lab order will be displayed. Only the records with 180 back days from the effective date of the document will be displayed.

Lab Type: This column will display the Lab type based on the recode 'LABTYPEEXTERNAL'. If the Lab is included in the recode, then it will be considered as 'External' lab and if not, it will be 'Internal' lab.

Order Name: Order name will be pulled from Client order details screen. Only the records with 180 back days from the effective date of the document will be displayed.

Observation: Observations will be pulled from Lab Results tab of Client order details screen. This is a hyperlink which will redirect to Client orders screen. Only the records with 180 back days from the effective date of the document will be displayed.

Value: Value will be pulled from Lab Results tab of Client Order Details screen.

Obs Value Hx: History icon will be displayed. On click of the icon, 'Lab Value History Popup' will open with the below details:

- **Date:** Pop-up will display 2nd most recent, 3rd most recent, and 4th most recent Lab Result Dates, based on the associated Observation and the Effective Date of document.
- **Value:** Pop-up will display 2nd most recent, 3rd most recent, and 4th most recent Lab Values, based on the associated Observation and the Effective Date of document.

Lab Value History Pop-up

PHQ9

Effective 04/01/2024

Status In Progress

Author Naik, Abhi

04/01/2024

PHQ9

Did Client refuse assessment or was it contraindicated? Yes

Lab Test Results

Ordered Date	Result Date	Lab Type	Order Name	Observation	Value	Obs Value Hx	Range	Flag	Reviewed By	Reviewer Comments
05/24/2024	04/01/2024	Internal	Lab Observation	GLUCOSE	22	🕒		Onfire	Naik,Abhi	Reviewer CommentsReviewer CommentsR
10/27/2023	03/11/2024	Internal	CBC (INCLUDES DIFF/PLT)	MCV	6	🕒	80.0-100.0	jjjj		
05/24/2024	03/01/2024	Internal	Lab Observation	GLUCOSE	33	🕒		Urgent	Naik,Abhi	Reviewer CommentsReviewer CommentsR
05/26/2024	03/01/2024	Internal	CARBAMAZEPINE, FREE 1,3	CARBAMAZEPINE, FREE 1,3	02	🕒	1.0-3.0	Low	Naik,Abhi	Test Comment

Refresh

Lab Value History Popup

Date:	03/01/2024	02/01/2024	01/01/2024
Value:	33	55	77

Range: Range will be pulled from Lab Results tab of Client order details screen.

Flag: Flag will be pulled from Lab Results tab of Client order details screen.

Reviewed By: Staff Name will be displayed and this will be pulled from Review tab of Client order details screen.

Reviewer Comments: The Comments added in the Reviewer Comments field in the Review tab will be initialized. This column has fixed column width with ellipsis. On mouse hovering on the comments, it will show the text up to 250 characters.

Data Model Changes: ClientOrderObservationDocuments table is added.

Author: Chaitali Patil

150: Core Bugs # 128137: Display issue in Client Order detail screen.

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

Navigation Path 1: Administration -- Orders -- Click on 'New' -- Select any order type - Give the long order name (Like more than 50 characters) - fill others required fields -- Click on 'Save'.

Navigation Path 2: Client -- Client Order -- Click on 'New' -- search for created Order in the (Navigation Path 1) -- and verify all alignment is proper or Not-- fill all required field -- Select Preference checkbox -- Click on Insert -- Click on 'Save' -- Navigate to the preference Tab -- select respective orders check box -- Observe the alignment.

Navigation path 3: Administration -- 'Order Set' -- Click on 'New' -- Give name to the 'Order Set' -- Select respective Order Type -- search for created order in the Navigation path 1 -- Click on 'Add' -- Check the checkbox for 'Enable Default' -- Click on 'Save'.

Navigation Path 4: Client -- Client Order -- Click on 'New' -- Client Order screen -- Navigate to the 'Order Set' tab -- search for created order set in the Navigation Path 3 -- check the checkbox for respective orders -- Observe alignment.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the Order tab, Order Set tab, Preferences tab of 'Client Order' details screen, when the 'Order Name' contains more than 50 characters, the order alignment was not displaying properly and the field was overlapping with the other labels on the screen.

With this release, the above-mentioned issue has been Resolved. Now, the Order name is displayed properly without any alignment issue, when the 'Order Name' contain greater than 50 characters in the Order tab, Order Set tab, Preferences Tab in 'Client Order' details screen.

Client Search

Reference No	Task No	Description
41	Core Bugs # 128131	Client Search icon the system was taking more time to load the list of Clients.
42	Core Bugs # 128154	Issue in Quicklinks icon display.

Author: Aishwarya Bommaklar

41: Core Bugs # 128131: Client Search icon the system was taking more time to load the list of Clients.

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

Navigation Path: 'Client Search icon'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the client list was huge in the Client Search icon, the system was taking more time to load the list of Clients.

With this release, the above-mentioned issue is resolved. Now, the client list is loading quickly in the Client Search without any performance issue.

Author: Kiran Tigarimath

42: Core Bugs # 128154: Issue in Quicklinks icon display.

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

Navigation Path: 'Login' -- 'Search for any quicklink (screen)'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user searched for any quick link (screen), all the quick links icon were displayed with 'Q' even though category was reports, Screens etc.

With this release, the above-mentioned issue has been resolved. Now, when the user searches for any quicklink(screen), the icon will be displayed properly based on the category like reports, screens etc.

Clinical Data Access Groups (CDAG)

Reference No	Task No	Description
43	EII #127292	Implementation to apply CDAG Rules for Attach/Review Documents pop-up and List of Releases section.
44	Core Bugs # 127866	Internal Consent Management: Care Consent is not allowing users to have view access to documents outside of their CDAG when it is supposed to.
45	Core Bugs # 127922	'Scanning' and 'Scanned Medical Records' list: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank.
46	Core Bugs # 127877	'Document', 'My Documents' and 'Disclosures/Requests': CDAG logic change to consider 'ProgramId' value if the 'ClientProgramId' value does not exist.
47	Core Bugs # 127176	User is able to sign documents under programs they're no longer a part of.

71	Core Bugs # 127924	Grievances/Appeals List Page: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank.
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Author: Muttu Venkatachalah

43: EII # 127292: Implementation to apply CDAG Rules for Attach/Review Documents pop-up and List of Releases section.

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

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

Prerequisites:

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

Navigation Path: 'Client' -- 'Client Information (C)' -- 'Release of Information Log' -- 'Attach/Review Documents (Client Information)' pop-up and 'List of Releases' section.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Release of Information Log tab of Client Information screen, the List of Releases section showed Release of Information documents that were tagged with a program that was NOT associated with the logged-in user's CDAG profile. Also, the application showed ROI documents, scanned documents and service notes that are attached in the 'Attach/Review Documents (Client Information)' pop-up without looking at the logged-in user's selected CDAG profile.

With this release, the above mentioned issue has been resolved. Now, the Client Information (Screen) - Release of Information Log (Tab) > "Attach/Review Documents (Client Information)" pop-up and "List of Releases" section will show only ROI documents, scanned documents, and service notes that are attached and that are associated with a program that are there in the logged-in user's selected CDAG profile.

Author: Akshay Vishwanath

44: Core Bugs # 127866: Internal Consent Management: Care Consent is not allowing users to have view access to documents outside of their CDAG when it is supposed to.

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.

Prerequisites:

1. The system configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.

2. The system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.
3. The 'Client Guardian' or 'Client Relation' who will co-sign the consent document is marked as 'Guardian' through the below **path**:

'Client' search -- 'Client Information(c)' screen -- 'Contacts' Tab. With this only the CDAG rule will be applied.

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

Navigation Path: 'Client' search -- 'Internal Consent Management' document -- 'Sign' with 'Staff User' -- 'Co-sign' with 'Guardian'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the staff signed the 'Internal Consent Management' document and the Guardian co-signed the same document, it was not considered that the consent was provided.

With this release, the above-mentioned issue has been resolved. Now, it is considered as consent is provided when the staff signs the 'Internal Consent Management' document and the Guardian co-signs the same document.

Author: Santosh Huggi

45: Core Bugs # 127922: 'Scanning' and 'Scanned Medical Records' list: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank.

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

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

Prerequisites:

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

Navigation Path 1: Log in to SmartCare Application -- Select CDAG group -- select the 'Client' -- Navigate to 'Scanning' -- 'Scanning' list screen -- 'Scanned Medical Record Detail' Or 'Upload File Detail' screens.

Navigation Path 2: Log in to SmartCare Application -- Select CDAG group -- 'My Office' -- Navigate to 'Scanned Medical Records'-- 'Scanned Medical Records' list screen -- 'Scanned Medical Record Detail' Or 'Upload File Detail' screens.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'Scanning' and 'Scanned Medical Records' list and detail pages, the records were getting listed irrespective of the CDAG rule, when the records didn't have 'ClientProgramId' in 'ImageRecords' and 'Documents' tables for that particular records.

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

1. If the 'ClientProgramId' is not present, then the application will consider the 'ProgramId' field value. The records will be displayed based on the programs associated with the logged in user's Clinical Data Access Group.
2. For the records with 'Completed' status, the 'Program' dropdown field will be disabled on 'Scanned Medical Record Detail' and 'Upload File Detail' screens.

Note:

1. If the record is being displayed based on 'ProgramId', then in 'Scanned Medical Record Detail' and 'Upload File Detail' screens, the 'Program' dropdown will display program name without dates. (eg. Test_Program1)
2. If the record is being displayed based on 'ClientProgramId', then in 'Scanned Medical Record Detail' and 'Upload File Detail' screens the 'Program' dropdown will display program name with dates. (eg. Test_Program1 - 05/16/2024)

Author: Akshay Vishwanath

46: Core Bugs # 127877: 'Document', 'My Documents' and 'Disclosures/Requests': CDAG logic change to consider 'ProgramId' value if the 'ClientProgramId' value does not exist.

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

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

Prerequisites:

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

Navigation Path 1: 'Log in to SmartCare Application' -- 'Select CDAG group' -- select the 'Client' -- Navigate to 'Documents' -- 'Documents' list page.

Navigation Path 2: 'Log in to SmartCare Application' -- 'Select CDAG group' -- select the 'Client' -- Navigate to 'Documents' -- 'Documents' list page -- 'Document Detail' screen.

Navigation Path 3: 'Log in to SmartCare Application' -- 'Select CDAG group' -- select the 'Client' -- Navigate to 'My Documents' -- 'My Documents' list page.

Navigation Path 4: 'Log in to SmartCare Application' -- 'Select CDAG group' -- select the 'Client' -- Navigate to 'Disclosures/Requests' list page -- Click on 'New' -- 'Disclosures/Requests Details' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour.

- When the records did not have 'ClientProgramId' field values present in 'Documents' table, the records were listed irrespective of the CDAG rule in 'Documents' and 'My Documents' list pages.
- When the 'ClientProgramId' field values were missing in the 'ClientDisclosures' table, the records were listed irrespective of the CDAG rule on the Disclosures/Requests list page.

With this release, the above-mentioned issues have been resolved. Now, if the 'ClientProgramId' field value is not present, then the system will consider the 'ProgramId' field value. The records will be displayed based on the programs associated with the logged in user's Clinical Data Access Group.

Note:

1. If the record is being displayed based on 'ProgramId' then in 'Document Detail' and 'Document list' screens the 'Program' dropdown will display program name without dates. (eg. Test_Program 1).
2. If the record is being displayed based on 'ClientProgramId' then in 'Document Detail' and 'Document list page' screens the 'Program' dropdown will display program name with dates. (eg. Test_Program1-05/16/2024).

Author: Sunil Belagali

47: Core Bugs # 127176: User is able to sign documents under programs they're no longer a part of.

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 1: Login to 'SmartCare' application as 'User 1' -- 'Client' search -- select a Client -- 'Documents' -- Select the required Program in 'Program selection' pop-up -- 'Document Detail' Page -- Fill the required details -- 'Save'.

Navigation Path 2: Login to 'SmartCare' application as User 2 -- Navigate to 'Staff Details' page of User 1 -- 'Proc/Prog/Loc/Proxy/Supervisor' tab -- 'Programs' section -- Delete the Program selected in the 'Navigation path 1' -- 'Save'.

Navigation Path 3: User 1 was allowed to 'Sign' the 'InProgress' Document in Navigation Path 1.

Functionality 'Before' and 'After' release:

Before the release, here was the behaviour. The users were able to 'Sign' the 'InProgress' Documents under the Program, even though they were no longer a part of it.

With this release, the above-mentioned issue has been resolved. Now, the users can't Sign the 'InProgress' Documents under the Program which they were no longer a part of. Upon click on sign button, the below validation message is displayed:

Validation Message: "Program Selection is required"

Author: Kiran Yogendra

71. Core Bugs # 127924: Grievances/Appeals List Page: Records were getting listed irrespective of the CDAG rule if 'ProgramId' value exists but 'ClientProgramId' value is blank.

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

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

Prerequisites:

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

Navigation Path 1: Log in to 'SmartCare Application' -- Select 'CDAG group' -- Navigate to 'Grievances' -- 'Grievances' list page.

Navigation Path 2: Log in to 'SmartCare Application' -- Select 'CDAG group' -- Navigate to 'Appeals' -- 'Appeals' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Grievances' and 'Appeals' list pages, the records were getting listed irrespective of the CDAG rule if the 'ProgramId' value exists, but the 'ClientProgramId' value does not exist.

With this release, the above-mentioned issue has been fixed. Now, If the 'ClientProgramId' field value is not present, then the application will consider the 'ProgramId' field value to display the list of 'Grievances' and 'Appeals' on the list page.

Note: The records will be displayed based on the programs associated with the logged-in Staff's Clinical Data Access Group (CDAG).

Compliance Core

Reference No	Task No	Description
48	EII # 127327	Implementing new 'Client Access Details', 'Client Access List', 'Client Search_new', 'Access Overrides_new', and 'Recodes_New' screens.

Author: Savitha Siddaraju

48: EII # 127327: Implementing new 'Client Access Details', 'Client Access List', 'Client Search_new', 'Access Overrides_new', and 'Recodes_New' screens.

Release Type: New | **Priority:** Medium

Navigation Path 1: 'Administration' menu -- 'Client Access list' screen.

Navigation Path 2: 'Administration' menu -- 'Client Access list' screen -- Click on 'New' icon -- 'Client Access Details' screen.

Navigation Path 3: 'Administration' menu -- 'Role definition' screen -- 'Permission' section -- 'Client Access Rules' permission type -- 'Allow Restricted client search' permission item -- 'Grant/Denied'.

Navigation Path 4: 'My Office' menu -- 'Client Access Override' Report'.

Navigation Path 5: 'Administration' menu -- 'Recodes' screen -- Search recodes category 'SetStaffGrantAccessToRestrictedClient'.

Functionality 'Before' and 'After' release:

Purpose: To block the staff who don't have access to particular clients. 'It allows for greater client privacy and prevents any overt or covert curiosities about client care when the information does not need to be known by the staff doing the search.

With this release, the new screens 'Client Access Details', 'Client Access List', 'Client Search_new', 'Client Access Override report', and 'Recodes' screens have been implemented with validations.

'Client Access Details' screen:

Instructions: Choose the Client ID from the initial section. Upon saving, access for all staff users will be denied for this selected client, except for those specified in the Staff Name/Staff Roles options, for the specified duration. Use the Staff Name or Staff Roles fields to either specify individual staff members or assign staff roles that will grant access to the client during the specified timeframe. Once the end date is reached, the access restrictions will be lifted automatically. – This is a label.

Client to be denied to all staff users: This section contains the below-mentioned fields:

- **Client ID:** This is the textbox field used to enter client ID.
 - a. It will verify if the 'Client ID' is valid. If it is, the system will check for the existence of the record in the restricted clients list. If the record already exists, the following validation message will be displayed:

Validation Message: "Client Access Details - Client to be denied to all staff users - The selected Client Id (6771) is already a restricted Client.

Client Access Details ⚙️ AB 📄 Save ✕

❌ Client Access Details - Client to be denied to all staff users - The selected Client Id (6771) is already a restricted Client.

Instructions

Choose the Client ID from the initial section. Upon saving, access for all staff users will be denied for this selected client, except for those specified in the Staff Name/Staff Roles options, for the specified duration. Use the Staff Name or Staff Roles fields to either specify individual staff members or assign staff roles that will grant access to the client during the specified timeframe. Once the end date is reached, the access restrictions will be lifted automatically.

Client to be denied to all staff users

Client ID: 🔍 Client Name:

Effective Start Date: 📅 Effective End Date: 📅

Comments:

Access information

Staff Names: Role:

No data to display No data to display

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b. If not, the validation message will prompt the user to enter a valid 'Client ID'.

- **Magnifying glass:** On clicking the icon, the client search pop-up will appear.
- **Client Name:** This is a textbox field that displays the client name based on the selected Client ID. Additionally, when 'Client Record' is chosen from the client search pop-up, the corresponding Client Name is automatically populated.
- **Effective Start Date:** This is a 'Date Control'. If the start date field is empty or blank, the following validation message will be displayed upon saving the screen:

Validation Message: "Client Access Details - Client to be denied to all staff users - Effective Start Date is Required."

Client Access Details ⚙️ AB 📄 Save ✕

❌ Client Access Details - Client to be denied to all staff users - Effective Start Date is Required.

Instructions

Choose the Client ID from the initial section. Upon saving, access for all staff users will be denied for this selected client, except for those specified in the Staff Name/Staff Roles options, for the specified duration. Use the Staff Name or Staff Roles fields to either specify individual staff members or assign staff roles that will grant access to the client during the specified timeframe. Once the end date is reached, the access restrictions will be lifted automatically.

Client to be denied to all staff users

Client ID: 🔍 Client Name:

Effective Start Date: 📅 Effective End Date: 📅

Comments:

- **Effective End Date:** This is 'Date Control'.
- **Comments:** This is the text field, where the user can enter the text.

Access information: This section contains below-mentioned dropdown fields.

- **Staff Names:** This dropdown field is used to pull all the active staff from Staff/user except for the non-staff. Users can add multiple staff.
- **Role:** This is a dropdown field used to pull all roles from the "Role definition (Admin)" except non-staff. Users can add multiple roles.

When either staff names or roles are not added and the screen is saved, the following validation message will be displayed:

Validation Message: "Client Access Details - Access information - Either Staff name or Staff role is Required."

The screenshot shows the 'Client Access Details' form with a red error message at the top: "Client Access Details - Access information - Either Staff name or Staff role is Required." The form is divided into three main sections: 'Instructions', 'Client to be denied to all staff users', and 'Access information'. The 'Access information' section contains two dropdown fields, 'Staff Names' and 'Role', both of which are empty and highlighted with red boxes. Below these fields, the text 'No data to display' is shown. The 'Client to be denied to all staff users' section includes fields for 'Client ID' (6771), 'Client Name' (Test, Client_BGT2), 'Effective Start Date' (06/01/2024), and 'Effective End Date'. The 'Instructions' section provides guidance on how to use the form.

The staff names/staff roles listed in the 'Client Access Details' screen will be granted access to the client. Other staff members will be restricted until the specified end date.

Once the 'End Date' is reached, the access restrictions for the selected staff names/roles in the 'Access Information' section will be automatically removed.

If no 'End Date' is specified, then the client is considered, the client will remain restricted until the 'End Date' is updated.

Client Access Details

Instructions

Choose the Client ID from the initial section. Upon saving, access for all staff users will be denied for this selected client, except for those specified in the Staff Name/Staff Roles options, for the specified duration. Use the Staff Name or Staff Roles fields to either specify individual staff members or assign staff roles that will grant access to the client during the specified timeframe. Once the end date is reached, the access restrictions will be lifted automatically.

Client to be denied to all staff users

Client ID

2105549

Client Name

Test, Client_SA1

Effective Start Date

05/30/2024

Effective End Date

05/31/2024

Comments

Access information

Staff Names

Test_SA1, Ram

Role

Clinician_SA

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'Client Access List' screen:

This '**Client Access List**' screen contains the filter along with the following grid:

- **Start:** This is a date control field, displaying the date format as 'MM/DD/YYYY'.
- **End:** This is a date control field, displaying the date format as 'MM/DD/YYYY'.
- **Client Name:** This filter is used to search for 'Client Name' using the 'First Name' or 'Last Name', or 'Client ID'.
- **Staff:** This filter is used to search the 'Staff Name' using the 'First Name' or 'Last Name'.
- **Role:** This filter is used to search for the 'Role' from the "Role Definition" excluding non-staff roles.

The grid contains below- mentioned columns:

- **Sequence ID:** The 'Sequence ID' is the ID that will be displayed which is stored in a new table in the Database.
- **Client Name:** The client name will be pulled from the "Client Name" field in the "Client Access Details" page for the corresponding client. This field will be displayed in the format "Last Name, First Name, Client ID".
- **Staff:** It can have multiple staff names, separated by a semi-colon. This field is displayed in the format "LastName, FirstName". The staff names will be pulled from the "Staff Name" field in the "Client Access Details" page for that corresponding client.
- **Role:** It can have multiple staff Roles. This field is displayed in the format "Last Name, First Name". The staff names will be pulled from the "Staff Name" field in the "Client Access Details" page for the corresponding client.
- **Start Date:** The start date will be pulled from the "Effective Start Date" field in the "Client Access Details" for that corresponding client.
- **End Date:** The start date will be pulled from the "Effective End Date" field in the "Client Access Details" for that corresponding client.

Client Access List (1)

Start

05/01/2024

End

Client Name

2105549

Staff

Role

Apply Filter

Sequence ID	Client Name	Staff	Role	Start Date	End Date
1	Test, Client_SA1, 2105549	Test_SA1, Ram	Clinician_SA	05/30/2024	05/31/2024

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Client Search New:

'Role Definition' screen:

a) In the 'Role Definition' screen, a new 'Allow Restricted Client Search' permission item is added in the 'Client Access Rules' permission type, and by default, it will be denied, below-mentioned points are the functionality of 'Allow Restricted Client Search' permission:

- The new permission will enable the user to search for restricted clients (Only the restricted clients who were added in the "Client Access Details" page).
- If the 'Allow Restricted Client Search' permission is set to "Granted", then the "Request Client Access" button will be displayed and disabled in the client search pop-up.
- If the 'Allow Restricted Client Search' permission type is set to "Denied", the "Request Client Access" button will not be displayed.

Role Definition

roles

☐ Intake
 ☐ LCM
 ☐ Manager
 ☐ MCO
 ☐ Medical
 ☐ MH services clinical Role
 ☐ MH test
 ☒ Nurse_SA
 ☐ Odyssey

Permission Utilities

Selected Role: Nurse_SA
[Copy permissions from one role to selected role...](#)
[Remove permissions from selected role...](#)
[Grant complete access to selected role...](#)

Default Permissions for Selected Role

ClientAccess Rules

Select Parent...

All

Permission Item

Allow restricted client se

Apply Filter

Grant All

Deny All

Permission Type	Parent	Permission Item	Not Allowed	Granted
ClientAccess Rules		Allow restricted client search	Denied	Grant

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'Client Search' pop-up:

i) The '**Select**' button follows the below-mentioned functionality:

- When the staff has access to the restricted client through the 'Allow Restricted Client Search' permission, the searching will follow the standard client search process and display the restricted client in the search if permissions allow.
- When the staff tries to access a restricted client by clicking on the "Select" button in the client search, a red error message will be displayed on the below screen:

Red Message: "You don't have access to the selected client. Please select the "Request Client Access" option for requesting access to the client".

Client Search

✖ You don't have access to the selected client. Please select the "Request Client Access" option for requesting access to the client.

Provider: All Providers

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client: ☒ Individual ☐ Organization ☐ Family

Last Name: Test First Name: Client_BGT1 Program: [v]

Other Search Strategies

SSN Search 999 43 5678 **Phone # Search** []

DOB Search [] **Master Client ID Search** []

Primary Clinician Search [v] **Client ID Search** []

Authorization ID / # [] **Insured ID Search** []

External ID []

Records Found

ID	Master ID	Client Name	Chosen Name	SSN/EIN	DOB	Status	City	Primary Clinician
6729	6729	Test, Client_BGT1		5678	11/10/19...	Active		

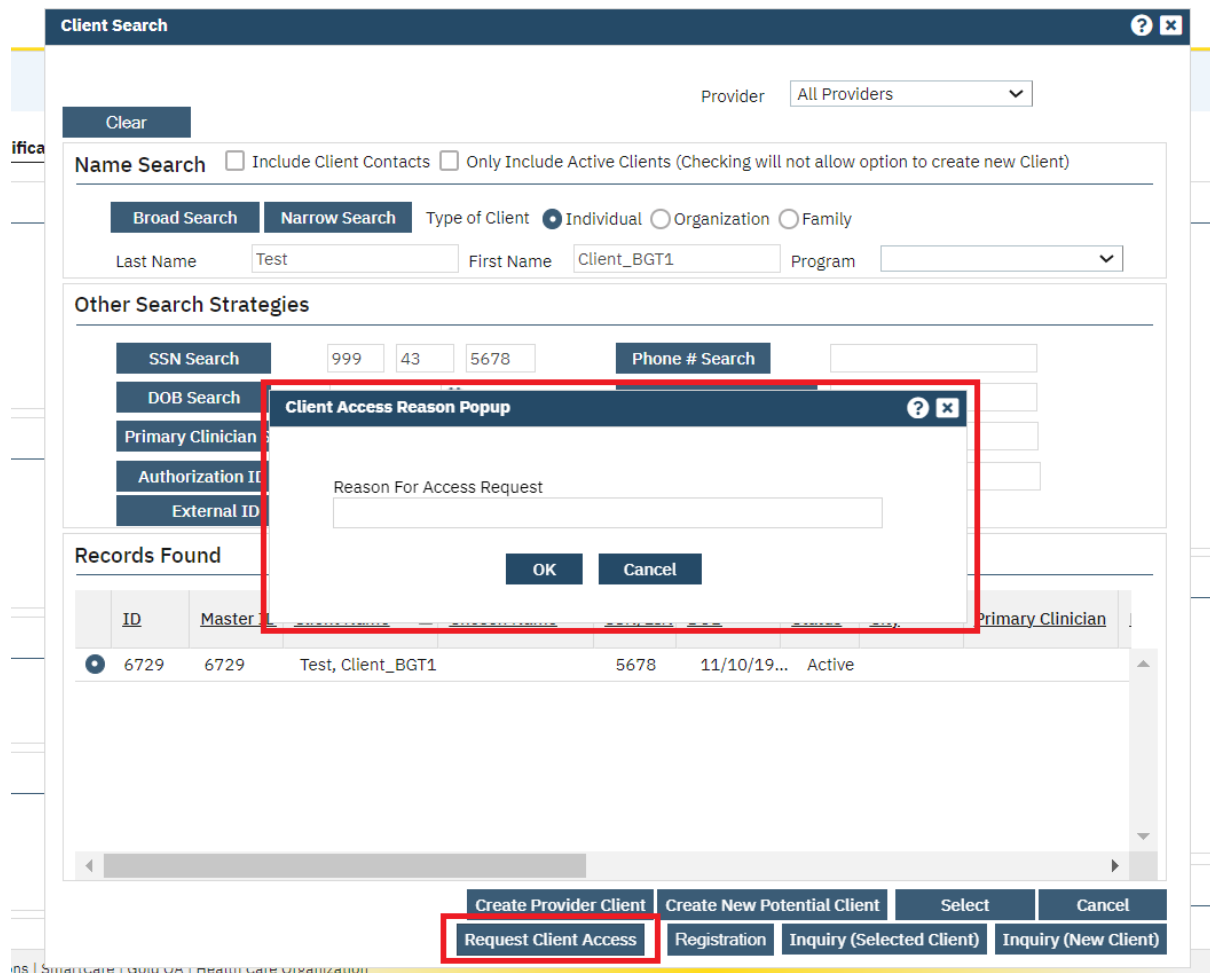
Create Provider Client Create New Potential Client **Select** Cancel

ii) The **'Request Client Access'** button can be enabled or disabled on the following conditions:

- The new button will be displayed in the client search popup based on the permission set in the 'Role Definition/Staff User' screen.
- For a restricted client, the "Allow Restricted Client Search" marked as "Granted" and the staff's 'Client Access Override' rule, client details can be viewed in the "Client Search Pop-up" and the "Request Client Access" button will be displayed.
- If "Allow Restricted Client Search" is marked as "Denied" for a restricted client, then any restricted client, based on the staff's client access permission, will not show in the 'Client search' pop-up.
- The new button will be displayed in all client search pop-up present in different screens, as the staff might try to access restricted clients from those screens as well.
- For the staff who have 'Administration' role access and SystemAdministrator='Y' in the staff table, the default permission will work as per the framework.

iii) **'Reason For Access Request'** textbox field: The staff has to enter the reason to access the restricted client.

- When a staff clicks on "Request Client Access", a reason pop-up will be displayed with the 'OK' and 'Cancel' buttons along with a textbox, it will display for requesting staff, and upon clicking 'OK', a green message "Client access has been requested" will be displayed at the top of the screen. Clicking 'Cancel' will navigate back to the 'Client Search Pop-up'.



Client Search

Provider: All Providers

Clear

Name Search ☐ Include Client Contacts ☐ Only Include Active Clients (Checking will not allow option to create new Client)

Broad Search **Narrow Search** Type of Client: ☒ Individual ☐ Organization ☐ Family

Last Name: Test First Name: Client_BGT1 Program:

Other Search Strategies

SSN Search: 999 43 5678 Phone # Search:

DOB Search:

Primary Clinician:

Authorization ID:

External ID:

Records Found

ID	Master	Primary Clinician
6729	6729	Test, Client_BGT1

OK Cancel

Client Access Reason Pop-up

Reason For Access Request

OK Cancel

Create Provider Client Create New Potential Client Select Cancel

Request Client Access Registration Inquiry (Selected Client) Inquiry (New Client)

In the '**Message**' screen, the requesting restricted client will be displayed in the following format:

Message Format: "(Staff Name) (Staff ID) is requesting access to restricted client (Client Name) (Client ID) on (Date access was requested)."

- Request accepting staff role id will be mapped in a recode category '**SetStaffGrantAccessToRestrictedClient**'.
- Responsible staff can provide access to requested staff through the "Client Access Details" page by adding the requested staff name to the staff field.
- The responsible staff can either accept or decline the request from the restricted staff. A message will be communicated to the staff, for instance:

Message: "Their request for access thing the restricted Client record has been declined."

Messages (1) ☆ ☆ 📄 ⚙️ ? ✕

☒ Received ☐ Sent From: [] To: [] Apply Filter

This Month From Date: 06/01/2024 To Date: 06/30/2024

☐ ✕ ☒ Read Test_SA, David 06/08/2024 06:14 PM Test_Client_BG... Access to the Restricted Clien... Urgent Client Acces...

Reply Forward

Details

To: Test_QA, Savi From: Test_SA, David Date: 06/08/2024 6:14 PM Reference: Client Access Request

Client: Test_Client_BGT2 Subject: Access to the Restricted Client

(Test_SA, David)(5433) is requesting access to restricted client (Test_Client_BGT2)(6771) on (06/08/2024).

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Client Access Overrides Report: This is a new report screen with the following fields:

- **'Start Date':** This is a 'Date Control' field with request start date as a filter option.
- **'End Date':** This is a 'Date Control' field with request end date as a filter option.

The following grid column will be displayed upon clicking the 'View Report' button:

- **'Staff Name':** This is a grid field, Staff who has requested access to the restricted client record. Those Staff names will display as 'LastName, FirstName'.
- **'Date Of Requested Access':** This is a grid field displaying the date on which the staff requested access.
- **'Client They Requested Access For':** This is a grid field displaying the name of the client for which the staff has requested access. The staff name will be displayed in the format as 'Last Name, First Name (Client ID)'.
- **'Staff Who Granted' grid field:** This is a grid field displaying the staff name who has granted the request. The staff name will be displayed in the format as 'Last Name, First Name'.
- **Date of Access Granted field:** This is a grid field displays the access granted Date.

Client Access Overrides Report:

☆ ☆ Fax

Start Date: 5/1/2024 End Date: 7/1/2024 View Report

1 of 1 Find Next

Access Overrides

Staff Name	Date Of Requested Access	Client They Requested Access For	Staff Who Granted	Date Of Access Granted
r, Ramu	05/27/2024	Test_QA, Client1_C1 (4514)		
Test, Akash_SA	05/27/2024	Test_QA, Client1_C1 (4514)	Test_QA, Savi	05/27/2024
r, Ramu	06/06/2024	Test, T (1239)		
Test_QA, Savi	06/07/2024	Test, Client_BGT1 (6729)		
Test_SA, David	06/08/2024	Test, Client_BGT2 (6771)	Test_SA1, Rahul	06/08/2024

'Recodes' screen:

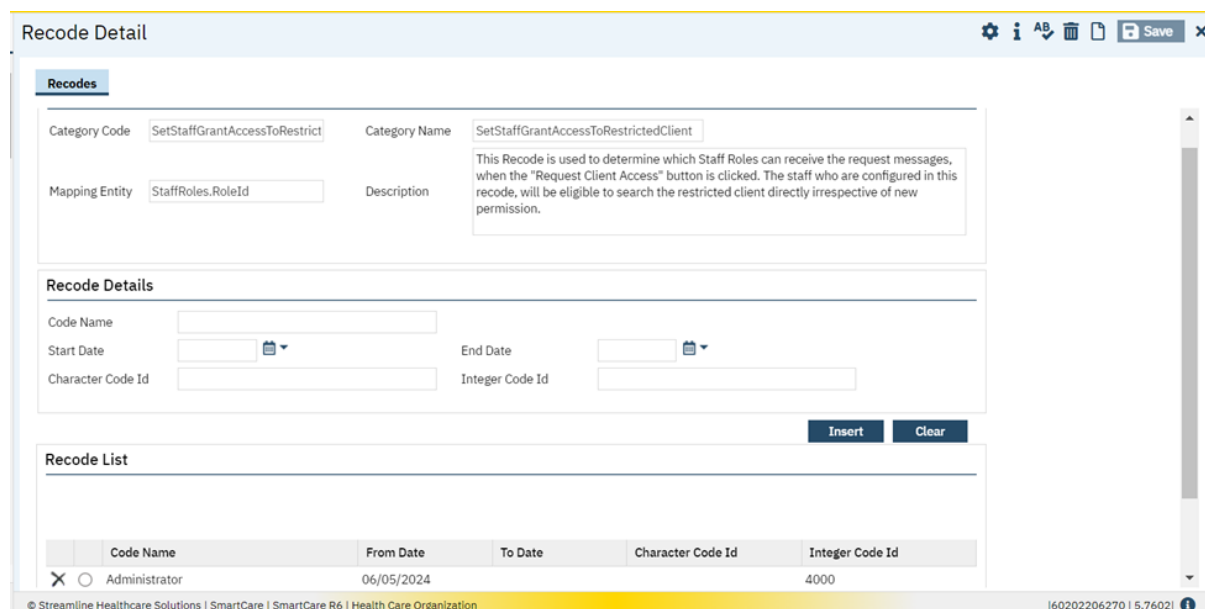
The '**SetStaffGrantAccessToRestrictedClient**' record category contains the following sections along with their respective fields.

'Recode Category' section:

- **CategoryCode/CategoryName:** 'SetStaffGrantAccessToRestrictedClient'.
- **Description:**
 1. This Recode is used to determine which Staff Roles can receive the request messages, when the "Request Client Access" button is clicked.
 2. The staff who are configured in this recode, will be eligible to search the restricted client directly irrespective of new permission.
 3. STAFFROLE = 'Administrator' is added as Default value for this recode. The customer can change the role ID if they wish to.
- **MappingEntity:** StaffRoles.RoleID

'Recode Details' section: The staff role ID will be inserted using the below fields.

- **Code Name:** This is a text box field where user can enter the Character/Code Name from table.
- **Start Date:** This is the date control field used to select the start date for the code name.
- **End Date:** This is the date control field used to select the end date for the code name.
- **Character Code Id:** This is textbox and it is a blank field.
- **Integer Code Id:** This is a textbox used to enter the staff role ID for the code name. The users can be allowed to enter numeric values.





Recode Detail

Recodes

Category Code	SetStaffGrantAccessToRestrict	Category Name	SetStaffGrantAccessToRestrictedClient
Mapping Entity	StaffRoles.RoleId	Description	This Recode is used to determine which Staff Roles can receive the request messages, when the "Request Client Access" button is clicked. The staff who are configured in this recode, will be eligible to search the restricted client directly irrespective of new permission.

Recode Details


Code Name:

Start Date:  End Date: 

Character Code Id: Integer Code Id:

Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
<input checked="" type="radio"/>	Administrator	06/05/2024			4000

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Data Model Changes: The 'ClientAccessAllStaffDenials', 'ClientAccessAllStaffDenialAccessRequests', 'ClientAccessAllStaffDenialStaffOverrides', 'ClientAccessAllStaffDenialRoleOverrides' tables are added.

Configuration Key

Reference No	Task No	Description
49	EII # 127597	Implementation of Configuration key to display staff drop-downs as typeable search text boxes.

Author: Rakesh Naganagoda

49: EII # 127597: Implementation of Configuration key to display staff drop-downs as typeable search text boxes.

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

Navigation Path: 'Administration' -- 'Configuration keys' screen.

Functionality 'Before' and 'After' release:

Purpose: To display all staff drop-downs as typeable search text boxes to improve the performance of the SmartCare application.

With this release, a new configuration key DisplayStaffAsTypeableSearchTextBox is implemented to display all staff drop-downs as typeable search text boxes.

System Configuration Key Details:

Key Name: DisplayStaffAsTypeableSearchTextBox

Read Key as: Display Staff As Typeable Search TextBox

Default Value: No

Allowed Values: Yes, No.

Modules: SCM SmartCare Platform and Framework/Document Framework, SCM SmartCare Platform and Framework/Service Note Framework, SCM Admin 2/Services (Core), SCM Admin 2/Services/Notes (Core), SCM Admin 2/Group Service Detail (Core), SCM Client Intake, SCM Scanning.

Description:

This is a change to our core product by introducing a system configuration key. Currently, these screens utilize a drop-down menu for staff selection, which is inefficient for users with large staff lists.

This issue remained undetected previously due to the legacy nature of the screens and the lack of large staff deployments among our customer base.

Read Key as: Display Staff As Typeable Search Text Box.

- 1) If the key value is set to "Yes", then
 - 1.1) All staff drop-downs on the following screens will display typeable search text boxes instead of a drop-down.
 - i) Documents/Events
 - ii) Service Details
 - iii) Service Notes
 - iv) Batch Service Entry (Multi-Service Entry) and Team Scheduling Details.
 - v) Group Service Detail
 - vi) Mental Health Service Registration Document.
 - vii) Substance Use Disorders Registration.
 - 1.2) Co-signer drop-downs will be split into two fields:
 - i) The co-signer drop-down will display all options except staff values
 - ii) A new typeable search text box will be added that binds only the staff.
- 2) If the key value is set to "No", then
 - 2.1) The staff field will be displayed as a drop-down.
 - 2.2) The co-signer drop-down will display all options including staff values.
 - 2.3) The new typeable search text box will be hidden.

This will be the default value of the key, as it drives the existing behavior.

Note:

1. 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., the same as the key value is "No".
2. This key will be used exclusively to toggle the staff dropdown with the typeable search text box on the core screens mentioned above, as these are the latest core screens where staff were designed as a dropdown. All new screens adhere to our standard, featuring staff as a typeable search text box.


Configuration Key Details

☒ Allow Edit

Configuration Keys

Key	DisplayStaffAsTypeableSearchTextBox
SourceTableName	
Module	
Screen	
Value	No
Description	<p>i</p> <p>Read Key as: Display Staff As Typeable Search Text Box</p> <p>1) If the key value is set to "Yes", then</p> <p>1.1) All staff drop-downs on the following screens will display typeable search text boxes instead of a drop-down.</p> <ul style="list-style-type: none"> i) Documents/Events ii) Service Details iii) Service Notes iv) Batch Service Entry (Multi-Service Entry) and Team Scheduling Details v) Group Service Detail vi) Mental Health Service Registration Document vii) Substance Use Disorders Registration <p>1.2) Co-signer drop-downs will be split into two fields:</p>

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Configuration Key Details	
Value	
Description	<div><div></div><p>vii) Substance Use Disorders Registration</p><p>1.2) Co-signer drop-downs will be split into two fields:</p><p>i) The co-signer drop-down will display all options except staff values.</p><p>ii) A new typeable search text box will be added that binds only the staff.</p><p>2) If the key value is set to "No", then</p><p>2.1) The staff field will be displayed as a drop-down.</p><p>2.2) The co-signer drop-down will display all options including staff values.</p><p>2.3) The new typeable search text box will be hidden.</p><p>This will be the default value of the key, as it drives the existing behavior.</p><p>Note:</p><p>1. 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., the same as the key value is "No".</p><p>2. This key will be used exclusively to toggle the staff dropdown with the typeable search text box on the core screens mentioned above, as these are the latest core screens where staff were designed as a dropdown. All new screens adhere to our standard, featuring staff as a typeable search text box.</p></div>

Contact Notes

Reference No	Task No	Description
50	Core Bugs # 127790	Contact Notes list Page: An error message is displayed when trying to navigate to the 'Contact Note Detail' screen from the 'Contact Notes' list page.

Author: Lakshmi Kumarappan

50: Core Bugs # 127790: Contact Notes list Page: An error message is displayed when trying to navigate to the 'Contact Note Detail' screen from the 'Contact Notes' list page.

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

Navigation Path: 'Client' Search -- 'select a client' -- 'Contact Notes' -- 'Contact Notes' List Page -- Navigate to the 'Contact Notes Detail' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The following error message was displayed when the user tried to navigate to the 'Contact Note Detail' screen from the 'Contact Notes' list page.

Error Message: "Object cannot be cast from DBNull to other types."

With this release, the above-mentioned issue has been resolved. Now, the user can navigate to the 'Contact Note Detail' screen from the 'Contact Notes' list page without encountering an error message.

Core Assessment

Reference No	Task No	Description
51	EII# 1518	Implementation of Core Assessment document with Static and Dynamic tabs, where any DFA/ Non DFA documents can be attached as a tab along with an option to configure it based on certain conditions.

Author: Archana Govindappa

51: EII # 1518: Implementation of Core Assessment document with Static and Dynamic tabs, where any DFA/ Non DFA documents can be attached as a tab along with an option to configure it based on certain conditions.

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

Note: This MSP includes some code related to the work being done on our new Core Assessment. However, the screens have been marked as disabled at this time. This document should not yet be used as this is still in Beta and due to the current state of this functionality, the additional details typically found in the release notes is not present at this time. Future MSPs will have updated code for the use of the new Core Assessment and release notes will be updated to reflect those future changes.

Coverage Plans

Reference No	Task No	Description
52	Core Bugs # 127943	After executing the nightly billing job the Daily Limit field in the Aggregate Limits popup under the plan details is not getting updated in the Charge error section of the Charge details screen.

Author: Namratha Nagaraj

52: Core Bugs # 127943: After executing the nightly billing job the Daily Limit field in the Aggregate Limits popup under the plan details is not getting updated in the Charge error section of the Charge details screen.

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

Prerequisites:

1. The Procedure exists with Entered As 'Minutes'.
2. The Plan exists with a Rule 'Set Combine Aggregate Limits', configure through the below mentioned **path:** Plan (Administration)-Rules- Select 'Set Combine Aggregate Limits'- Click on 'Set Aggregate Limits' button- Select the Procedure (mentioned in the Step 1)- Enter the required value in the Daily text field (For Ex: set the value for 120 minutes)-Click on Insert-Click on save.
3. The Service is completed with the above procedure (Step 1) exceeding the daily limit (120 minutes) which is given for the Procedure code in the Add Aggregate Limits pop-up under the Plan details screen.
4. Ensure that EXEC.
dbo.ssp_SetChargeReadyToBill @CurrentUser = 'READYTOBILL' is executed.
5. The charge error message is displayed in the Charge details screen for the service which is exceeding the limit ('This Procedure has exceeded a combined aggregate limit. - This Procedure has exceeded a combined aggregate limit').
6. Again, navigate to the Plans details - Rules tab-Set aggregate Limits-Click on delete icon-Click on 'OK' in the Confirmation Message pop-up - Select the Procedure (mentioned in the Step 1)- Enter the required value in the Daily text field (For Ex: set the value for 60 minutes)-Click on Insert-Click on save.
7. The Service is completed with the above procedure (Step 1) exceeding the daily limit using (60 minutes) which is given for the Procedure code in the Add Aggregate Limits pop-up under the Plan details screen.
8. Ensure that EXEC

dbo.ssp_SetChargeReadyToBill @CurrentUser = 'READYTOBILL' is executed.

9. Again, the charge error message will be displayed for the modified value after running the above job when exceeding the daily limit.

Navigation Path: Services (Client) -- Charge Hyperlink -- Ledger Entries -- ChargeID Hyperlink -- Verify the Charge Errors section.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When executing a nightly billing Job, if daily limit value was deleted and again added after completing a service, again if nightly job was executed, the old value stored in the Daily Limit field was retained and it was not getting updated with the latest value which was added in the Daily Limit field in the Aggregate Limits pop under the plan details.

With this release, the above mentioned issue has been resolved. The Record delete check is added in the CoveragePlanRuleLimits table to avoid storing the old value in the Daily limit field and now, the Daily limit field is getting updated with the latest value after executing the nightly billing Job.

Dashboard

Reference No	Task No	Description
53	Core Bugs # 127826	Incident Reports(C) Widget: Notifications are not working for the new 'Core Incident Report' in the Dashboard.

Author: Sumalatha Kadligondi

53: Core Bugs # 127826: Incident Reports(C) Widget: Notifications are not working for the new 'Core Incident Report' in the Dashboard.

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

Prerequisite: Grant permission for the staff through the **Path:**

'Administration' -- 'Staff/Users' -- 'Staff/Users' list page -- Click on Staff Name hyperlink -- 'Roles/Permissions' tab -- Select the 'Permission Type' as 'Widgets' -- Permission Item as 'Incident Reports(C)' -- Click on 'Grant'.

Navigation Path 1: 'Client' search -- 'Incident Reports (My Office)' -- Click on the 'New' icon -- 'Core Incident Report' -- 'Fill the required fields' -- 'Save'.

Navigation Path 2: 'My Office' -- 'Dashboard'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. For the new 'Core Incident Report', the widget was not there for notifications. The functionality was working in the older core incident report but not in the new version.

With this release, the above-mentioned issue has been resolved. Now, a new 'Incident Report(C)' Widget has been implemented for notifications.

Disclosure/Request

Reference No	Task No	Description
54	EII # 127114	'Disclosure/Request Detail', 'Supervisee Primary Caseload Widget' screen – the staff data will be loaded based on the 'StaffAccessRules' permission and configuration key 'ApplyStaffAccessRule'.

Author: Savitha Siddaraju

54: EII # 127114: 'Disclosure/Request Detail', 'Supervisee Primary Caseload Widget' screen – the staff data will be loaded based on the 'StaffAccessRules' permission and configuration key 'ApplyStaffAccessRule'.

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

Navigation Path 1: Administration -- User Role Setup -- Staff/Users -- select required staff and click on 'Staff Name' hyperlink -- Staff Details -- 'Roles/ Permission' tab -- 'Permissions' section -- Select Permission Type as 'StaffAccessRules' -- click on 'Apply Filter'.

Navigation Path 2: 'Client' -- 'Disclosure/Request Details' screen -- 'Request Details' section -- 'Assigned To' dropdown -- 'Disclosure Details' section -- 'Disclosed By' dropdown field.

Navigation Path 3: 'My Office' -- 'Dashboard' -- 'Supervisee Primary Caseload' widget -- 'All Supervisee Staff' dropdown field.

Functionality 'Before' and 'After' release:

Purpose: The performance issues are observed in some customer environments due to large number of staff loading. To avert this scenario, this staff Access rule permission is applied.

With this release, the below mentioned permission type and configuration key is applied to display the values in 'Assigned To, 'Disclosed By' dropdown fields in 'Disclosure/Request Details' screen and 'All Supervisee staff' dropdown field in 'Supervisee Primary Caseload' Widget.

If the existing system configuration 'ApplyStaffAccessRule' key-value is set to "Yes", then the "StaffAccessRules" permission will be applied.

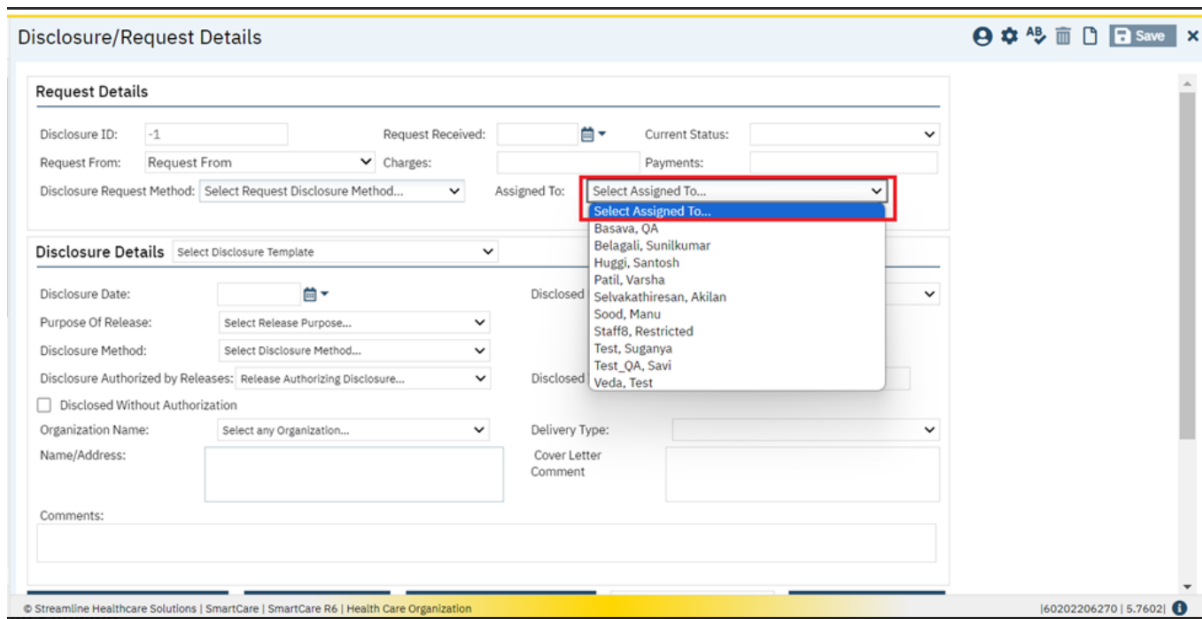
Permission Type: StaffAccessRules

Permission Item :

1. AllStaff
2. LimitedStaff

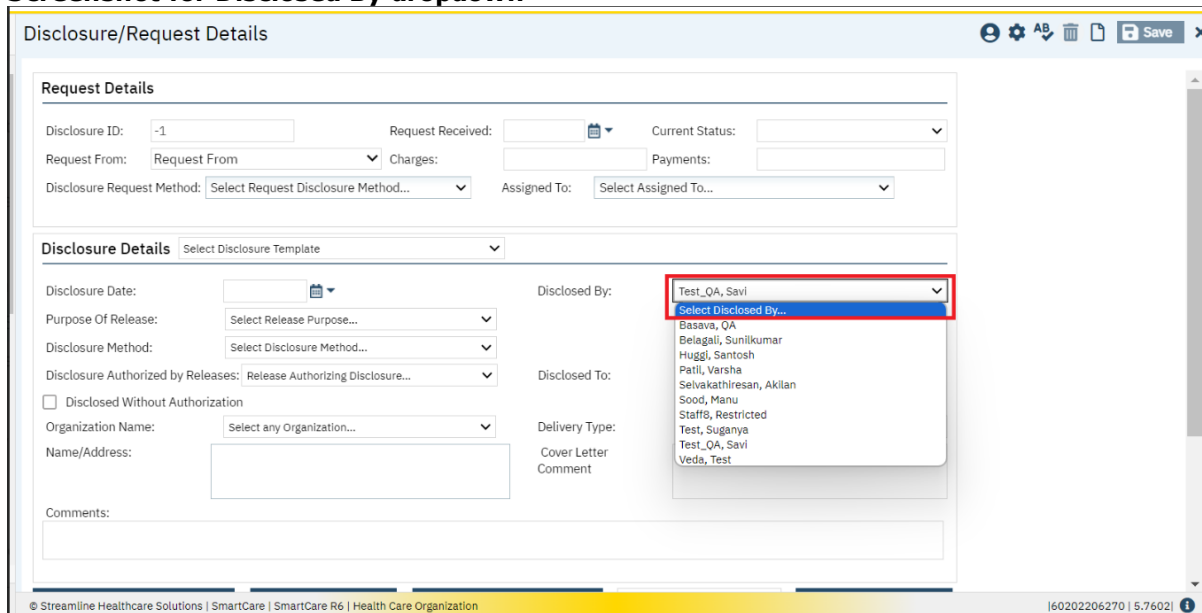
- If the logged in staff has "LimitedStaff" Access Rule, then the staff drop down displays the staff who is associated with the Program that the logged in staff is also associated with.

'Disclosure/Request Details' screen: - (Assigned To dropdown)



The screenshot shows the 'Disclosure/Request Details' screen. The 'Request Details' section includes fields for Disclosure ID, Request Received, Current Status, Request From, Charges, Payments, Disclosure Request Method, and Assigned To. The 'Assigned To' dropdown menu is open, showing a list of names: Basava, QA; Belagali, Sunilkumar; Huggi, Santosh; Patil, Varsha; Selvakathiresan, Akilan; Sood, Manu; Staff8, Restricted; Test, Suganya; Test_QA, Savi; and Veda, Test. The 'Disclosure Details' section includes fields for Disclosure Date, Purpose Of Release, Disclosure Method, Disclosure Authorized by Releases, Organization Name, Name/Address, and Comments. The footer shows the Streamline Healthcare Solutions logo and version information.

Screenshot for Disclosed By dropdown -



The screenshot shows the 'Disclosure/Request Details' screen. The 'Request Details' section includes fields for Disclosure ID, Request Received, Current Status, Request From, Charges, Payments, Disclosure Request Method, and Assigned To. The 'Assigned To' dropdown menu is open, showing a list of names: Basava, QA; Belagali, Sunilkumar; Huggi, Santosh; Patil, Varsha; Selvakathiresan, Akilan; Sood, Manu; Staff8, Restricted; Test, Suganya; Test_QA, Savi; and Veda, Test. The 'Disclosure Details' section includes fields for Disclosure Date, Purpose Of Release, Disclosure Method, Disclosure Authorized by Releases, Organization Name, Name/Address, and Comments. The footer shows the Streamline Healthcare Solutions logo and version information.

'Supervisee Primary Caseload Widget' –

Dashboard

Supervisee Primary Caseload

All Supervisee Staff

Dodge, Jennifer
Malipatil, Manjunath
M Sood, Munish
Sood, Munish
Test_QA, Savi
TG, Sahana
Total
0
0

Not Seen in 3 Mos
0
0
0
0
0
0
0
0

- b. If the logged in staff has "AllStaff" Access Rule , then the existing functionality to display all the staff in the drop down is retained.

'Disclosure/Request Details' screen -

Disclosure/Request Details

Request Details

Disclosure ID: -1
Request Received:
Current Status:
Request From: Request From
Charges:
Payments:
Disclosure Request Method: Select Request Disclosure Method...
Assigned To: Select Assigned To...
Program:

Disclosure Details

Select Disclosure Template
Disclosure Date:
Purpose Of Release: Select Release Purpose...
Disclosure Method: Select Disclosure Method...
Disclosure Authorized by Releases: Release Authorizing Disclosure...
☐ Disclosed Without Authorization
Organization Name: Select any Organization...
Name/Address:
Comments:

Disclosed
a, Aadi
a, Amar
AUTOM202211170730_StreamSta...
AUTOM202211181038_StreamSta...
AUTOM202211231155_StreamSta...
AUTOM202211250430_StreamSta...
AUTOM202211251012_StreamSta...
B, Jbhetthalam
Basava, Test
Belagali, Anilkumar
Belagali, Sunilkumar
Beveridge, Matthew
Chinnusamy, Boovendiran
Client11, Restricted

Disclosure/Request Details

Program:

Disclosure Details

Select Disclosure Template

Disclosure Date:

Purpose Of Release:

Disclosure Method:

Disclosure Authorized by Releases:

☐ Disclosed Without Authorization

Organization Name:

Name/Address:

Comments:

Disclosed By:

Disclosed To:

Delivery Type:

Cover Letter

Comment

Test_QA, Savi

Select Disclosed By...

1, Staff

125271, Core

2, Staff

3, Staff

345, '012

a, Aadi

a, Amar

AUTOM202211170730_StreamSta...

AUTOM202211181038_StreamSta...

AUTOM202211231155_StreamSta...

AUTOM202211250430_StreamSta...

AUTOM202211251012_StreamSta...

B, Jbhetthalam

Basava, Test

Belagali, Anilkumar

Belagali, Sunilkumar

Beveridge, Matthew

Chinnusamy, Boovendiran

Client11, Restricted

Attach / Review Items Disclosed...

Attach Report...

Add Redacted Disclosure...

Attach Record Set

View/Print Disclosed Items

Fax Disclosed Items...

Items Disclosed

'Supervisee Primary Caseload Widget' -

Dashboard

Supervisee Primary Caseload

All Supervisee Staff

Admin, Sithara

Dodge, Jennifer

L578, F578

L578, F578

L579, F579

L580, F580

L581, F581

Not Seen in 3 Mos

- c. If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.

'Disclosure/Request Details' screen -

Request Details

Disclosure ID: -1

Request Received:

Current Status:

Request From: Request From

Charges:

Payments:

Disclosure Request Method: Select Request Disclosure Method...

Assigned To: Select Assigned To...

Program:

Disclosure Details

Select Disclosure Template

Disclosure Date:

Disclosed:

Purpose Of Release: Select Release Purpose...

Disclosed Without Authorization: ☐

Disclosure Method: Select Disclosure Method...

Organization Name: Select any Organization...

Disclosure Authorized by Releases: Release Authorizing Disclosure...

Name/Address:

Comments:

1, Staff

125271, Core

2, Staff

3, Staff

345', '012

a, Aadi

a, Amar

AUTOM202211170730_StreamSta...

AUTOM202211181038_StreamSta...

AUTOM202211231155_StreamSta...

AUTOM202211250430_StreamSta...

AUTOM202211251012_StreamSta...

B, Jbhetthalam

Basava, Test

Belagali, Anil Kumar

Belagali, Sunil Kumar

Beveridge, Matthew

Chinnusamy, Boovendiran

Client11, Restricted

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60202206270 | 5.7602

Disclosure/Request Details

Program:

Disclosure Details

Select Disclosure Template

Disclosure Date:

Disclosed By: Test_QA, Savi

Purpose Of Release: Select Release Purpose...

Disclosed Without Authorization: ☐

Disclosure Method: Select Disclosure Method...

Organization Name: Select any Organization...

Disclosure Authorized by Releases: Release Authorizing Disclosure...

Name/Address:

Comments:

Attach / Review Items Disclosed...

Attach Report...

Add Redacted Disclosure...

View/Print Disclosed Items

Fax Disclosed Items...

Items Disclosed

'Supervisee Primary Caseload Widget' -

Dashboard

Supervisee Primary Caseload

All Supervisee Staff

Supervisee Name	Status	Last Seen
Admin, Sithara	Not Seen in 3 Mos	
A Dodge, Jennifer		Q
D L578, F578		Q
L578, F578	Q	Q
L579, F579	Q	Q
L580, F580	Q	Q
F581, F581	Q	Q

If the existing configuration 'ApplyStaffAccessRule' key-value is set to "No", then the "StaffAccessRules" permission will not be applied. This will be the default value of the key as it drives the existing behavior.

Document Codes

Reference No	Task No	Description
55	Core Bugs # 128066	User not able to edit the Service Notes.
56	EII #126800	Implementation of 'Laboratories' section in Document codes detail screen.

Author: Kiran Tigarimath

55: Core Bugs # 128066: User not able to edit the Service Notes.

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

Navigation Path: 'Client' -- 'Service/Notes'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. All the service notes records had NULL value for 'EditableAfterSignature' in DocumentCodes table. Due to this, the users were not able to edit the Service Notes.

With this release, the above-mentioned issue has been resolved. Now, all the column values in 'EditableAfterSignature' are updated to 'Y' in DocumentCodes table for Service Notes and user is able to edit the Service Notes.

Author: Praveen Gangadhara

56: EII # 126800: Implementation of 'Laboratories' section in Document codes detail screen.

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


Navigation Path: 'Administration' -- 'Document Codes' -- 'Open any document codes' -- Observe the 'Laboratories' section.

Functionality 'Before' and 'After' release:

Purpose: The customers do not have a way to signify how many days of data they want to show for each document's lab test results. The customers also do not have a quick way to look at lab value result trends within the document, without navigating to the Flowsheet for each individual Observation. This will save time for the user and for our teams incorporating this feature into future designs.

With this release, a new 'Laboratories' section has been implemented in the Documents Codes detail screen.

The 'i' icon: The 'i' icon is displayed next to the Laboratories label, on hover of the icon it will display "This section is for any Service Notes/Documents which uses Lab Test Results Common User Control. If a document requires to display a set number of days of Lab Test Results data outside of the default set 180 days, then it is set up here. The Lab Test Results on the document will be displayed based on this setup." Message.

Laboratories 

☒ Lab Type
 ☒ Internal
 ☐ External

This section is for any Service Notes/Documents which uses Lab Test Results Common User Control. If a document requires to display a set number days of Lab Test Results data outside of the default set 180 days, then it is set up here. The Lab Test Results on the document will be displayed based on this setup.

The below mentioned fields are displayed in the 'Laboratories' section:

Lab Type: This is a radio button, when selecting the radio button, it will enable the 'Internal' and 'External' checkboxes. The below validation message is displayed if the checkbox is not selected.

"Either Laboratories Lab Type 'Internal' or 'External' is required."

Internal: This is a checkbox, it is a required field. Displays the Days textfield it is a required field. On selection of this checkbox the days textfield gets enabled and it will allow to enter only less than or equal to '180' days. If the checkbox is selected and the Days text field is not selected, then the below validation message is displayed. "Enter Laboratories Lab Type Internal Days".

External: This is a checkbox and displayed with days textfield. On selection of this checkbox the days textfield gets enabled and it will allow to enter only less than or equal to '180' days. If the checkbox is selected and the Days text field is not selected then the below validation message is displayed.










"Enter Laboratories Lab Type External Days".

All Labs: This is a radio button and displayed with Days textfield, when selecting the radio button the Days text field enabled and it will allow to enter only less than or equal to '180' days . If the Days text field is displayed blank, then the below validation message is displayed.

"Enter Laboratories All Labs Days".

N/A: This is a radio button, when it is selected, the default value is '180' days for all labs, regardless of 'Internal' or 'External' Lab Type.

Document Codes Detail

General

HTML

Text Template


Mobile

Form Collection

Table List

Care Plan Details

☐ Care Plan

Laboratories 

☐ Lab Type
 ☐ Internal
 Days
 ☐ All Labs
 Days
 ☐ N/A

☐ External
 Days

Data Model Changes: 'LaboratoryType', 'LabTypeInternal', 'LabTypeExternal', 'LabTypeInternalXDays', 'LabTypeExternalXDays', 'AllLabsXDays' columns are added to the 'DocumentCodes' table.

Documents

Reference No	Task No	Description
57	Core Bugs # 128111	The duplicate diagnosis codes (ICD 10 Code) are displayed in 'Client Clinical Problems' list page.
58	Core Bugs # 127896	Diagnosis document: Pull from Client Clinical Problem List Not Working on Diagnosis Document.
59	Core Bugs # 127862	The data is not initialized in the 'Rapid Opioid Dependence' PDF document from the 'History and Current Use of Substances' section of the signed 'Assessment Document'.
60	Core Bugs # 128043	Information in the 'Consent to Treat' document PDF was not displaying properly.
61	EII # 126669	Referral Document: New validation message has been implemented.
62	Core Bugs # 127581	Agency/Program Discharge: Unwanted special characters displayed in Validation Message pop-up.
63	Core Bugs # 128097	Diagnosis Document: For specific ICD code (F50.81) duplicate values are displayed in the Favorite list.
64	Core Bugs # 128095	Core TEDS Data Set: Incorrect validation message was displayed.
65	Core Bugs # 128204	Document Codes – Duplicate document codes are appearing in the 'Document Codes' screen.
66	Core Bugs # 128075	Registration Document and Client Information: Primary Care Physician values were not displayed.

Author: Ashish Priyadarshi

57: Core Bugs # 128111: The duplicate diagnosis codes (ICD 10 Code) are displayed in 'Client Clinical Problems' list page.

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

Navigation Path 1: 'Client' -- 'Documents' -- 'Diagnosis Document'.

Navigation Path 2: 'Client' -- 'Client Clinical Problems' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When a user was signing the 'Diagnosis Document' by checking 'Push To Client Clinical Problems List' checkbox and selecting the program from 'Program' dropdown for the selected diagnosis code, the duplicate diagnosis codes (ICD 10 Code) were displayed in the 'Client Clinical Problems' list page.

With this release, the diagnosis codes (ICD 10 Code) are displayed correctly in 'Client Clinical Problems' list page

even if the user is signing the 'Diagnosis Document' by checking 'Push To Client Clinical Problems List' checkbox and selecting the program from 'Program' dropdown for the selected diagnosis code.

Author: Ramya Nagaraj

58: Core Bugs # 127896: Diagnosis document: Pull From Client Clinical Problem List Not Working on Diagnosis Document.

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. Set 'EnableClinicalDataAccessGrouping' configuration key to 'Yes'.
3. Set 'DisplayPullProblemListsButtonAndPushProblemListsCheckboxOnCoreDxDoc' key to 'Yes'.

Navigation Path: 'Client' -- 'Diagnosis Document' document.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In Diagnosis document, when a user clicked on 'Pull From Client Clinical Problems List' button, then 'Problem List' pop up was displaying blank.

With this release, the above mentioned issue has been resolved. Now, when a user clicks on 'Pull From Client Clinical Problems List' button, then 'Problem List' pop up is displaying proper values in Diagnosis document.

Author: Akshay Vishwanath

59: Core Bugs # 127862: The data is not initialized in the 'Rapid Opioid Dependence' PDF document from the 'History and Current Use of Substances' section of the signed 'Assessment 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: Fix | **Priority:** High

Prerequisite: Add the data in the 'History and Current Use of Substances' section and sign the Assessment Document through the **path:**

'Client' search -- Select a 'Client' -- 'Assessment' document -- Fill all the required fields -- 'Save' -- 'Sign'.

Navigation Path: 'Client' search -- Select a 'Client' -- 'Rapid Opioid Dependence Screen' document.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The Data was not being initialized correctly in the 'Rapid Opioid Dependence' PDF document when the user had added the data in the 'History and Current Use of Substances' section and signed the 'Assessment Document'.

With this release, the above-mentioned issue has been resolved. The data is now being initialized correctly from the 'History and Current Use of Substances' section of the 'Assessment document' to the 'Rapid Opioid Dependence' PDF document.

Author: Akshay Vishwanath

60: Core Bugs # 128043: Information in the 'Consent to Treat' document PDF was not displaying properly.

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

Navigation Path: Client -- 'Consent to Treat' document -- 'Sign'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'Consent to Treat' document PDF, incorrect Agency Name was displayed.

With this release, the above-mentioned issue has been resolved. Now, in the 'Consent to Treat' document PDF, the correct Agency Name is displayed.

Data Model Change: Added ConsentToParticipateComment and TreatmentOfferedRefusalComment columns to the table DocumentConsents.

Author: Akshay Vishwanath

61: EII # 126669: Referral Document: New validation message has been implemented.

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

Navigation Path 1: Login to the SmartCare (staff 1) -- 'Client' -- 'Referral' document -- Select staff (staff 2) from Receiving Staff -- Enter all the required details -- Click on sign.

Navigation Path 2: Login to the SmartCare (staff 2) -- Client- 'Referral' document -- Select value from the Referred to program dropdown -- select Program status -- Click on validate -- Verify the validation message.

Functionality 'Before' and 'After' release:

With this release, a new validation message has been implemented to the 'Status Date' field in the referral section of the 'Referral' document. When the 'Referred to Program' dropdown has values and 'Program Status' is selected as 'Enrolled' or 'Requested', then the below mentioned validation is displayed.

Validation message: 'Status Date field is required'.

The screenshot shows a web application interface for Streamline Healthcare. A validation message pop-up is displayed at the top left, stating "Referral - Status Date field is required". The background shows a form for "Need for Referral". The form includes a "Receiving Staff" dropdown set to "Huggi, Santosh", a "Referred to Program" dropdown set to "124804", and a table of "Currently Enrolled Program(s)". The table has three columns: "Currently Enrolled Program(s)", "Status", and "Enrolled Date". The table contains three rows of data. Below the table is a "Service Recommended" section with a text area. At the bottom, there is a checkbox for "Client has participated and is in agreement with this referral", a "Comment" text area, and a "Receiving Action" section with dropdowns for "Program Status" (set to "Enrolled") and "Assigned Clinician". The "Status Date" field is highlighted with a green box.

Currently Enrolled Program(s)	Status	Enrolled Date
2049 program	Enrolled	05/03/2024
2049 program 2	Enrolled	05/03/2024
124919	Enrolled	03/28/2024

Note: If the Customer doesn't want this validation, then they can deactivate it from Document Validations through below path:

Go search -- Document Validation -- 'Referral Document' --uncheck the 'Active' checkbox.

Author: Praveen Gangadhara

62: Core Bugs # 127581: Agency/Program Discharge: Unwanted special characters displayed in Validation Message pop-up.

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

Navigation Path: 'Client' -- 'Documents' -- 'Agency/Program Discharge' -- 'Check for validation message pop-up'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In 'Agency/Program Discharge' document, unwanted special characters were displayed (â€") in the place of (-) special character in validation message pop-up.

With this release, the above-mentioned issue has been resolved. In 'Agency/Program Discharge' document, the validation message pop-up displayed correctly without any unwanted special characters.

Author: Praveen Gangadhar

63: Core Bugs # 128097: Diagnosis Document: For specific ICD code (F50.81) duplicate values are displayed in the Favorite list.

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

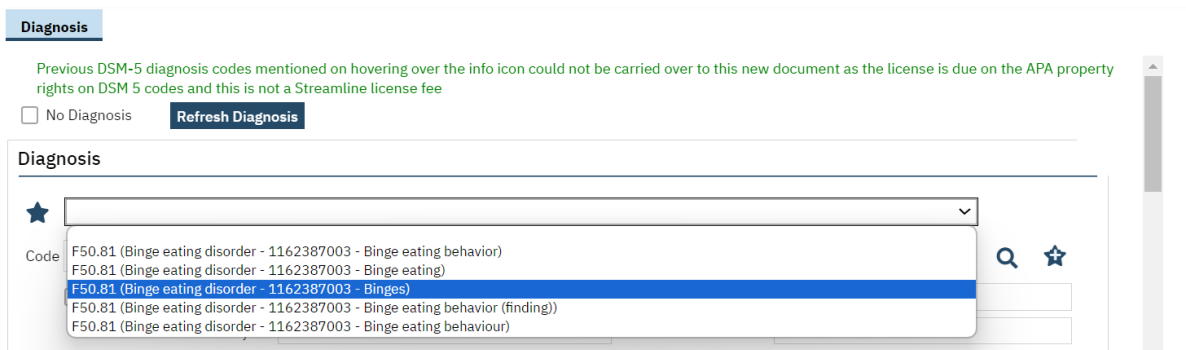
Navigation Path: 'Client' search -- 'Documents' -- 'Diagnosis Document' -- Search for the ICD code and add the code to the Favorite list -- Click on the 'Add Favorite' icon -- Click on the 'Favorite' list.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user tried to search for the specific ICD code (F50.81) in the 'Diagnosis Document', the duplicate values were displayed in the 'Favorite' dropdown field.

With this release, the above mentioned issue has been resolved. Now, in the 'Diagnosis Document', the user will no longer encounter duplicate dropdown values when the user tries to search for the specific ICD code (F50.81). The 'Favorite' list dropdown field now displays values in the specified format as below.

Format: ICD code – SNOMED code – Description.



The screenshot shows the 'Diagnosis' section of a document. At the top, there is a green message: 'Previous DSM-5 diagnosis codes mentioned on hovering over the info icon could not be carried over to this new document as the license is due on the APA property rights on DSM 5 codes and this is not a Streamline license fee'. Below this, there is a checkbox for 'No Diagnosis' and a 'Refresh Diagnosis' button. The main area is titled 'Diagnosis' and contains a search bar with a star icon. A dropdown menu is open, showing a list of codes and descriptions. The first three items are highlighted in blue: 'F50.81 (Binge eating disorder - 1162387003 - Binge eating behavior)', 'F50.81 (Binge eating disorder - 1162387003 - Binge eating)', and 'F50.81 (Binge eating disorder - 1162387003 - Binges)'. The remaining two items are 'F50.81 (Binge eating disorder - 1162387003 - Binge eating behavior (finding))' and 'F50.81 (Binge eating disorder - 1162387003 - Binge eating behaviour)'. To the right of the dropdown, there are search and star icons.

Author: Praveen Gangadhar

64: Core Bugs # 128095: Core TEDS Data Set: Incorrect validation message was 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

Navigation Path: Go search -- 'Client' -- 'Core TEDS Data Set document'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Core TEDS Data Set Document under the Family Information section for the '# of Dependents under 18' field, when the user entered the value as 'Zero (0)', then the below validation message was displayed and it was not accepting the integer value zero (0) in this field.

Validation Message: General-Family Information- '# of Dependents under 18' is required.

With this release, the above mentioned issue has been resolved. Now, in the Core TEDS Data Set Document under the Family Information section for the '# of Dependents under 18' field, the validation message is not displayed when the user enters the value as 'Zero (0)' and this field accepts the integer value zero (0).

Author: Santosh Huggi

65: Core Bugs # 128204: Document Codes – Duplicate document codes are appearing in the 'Document Codes' screen.

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

Navigation Path: 'Administration' -- 'Document Management' -- 'Document Codes' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. Below listed document names were showing duplicate records in the Document Codes list page.

- C-SSRS Adult Assessment
- C-SSRS Adult Since Last Visit
- C-SSRS Children's Baseline Screening
- C-SSRS Paediatric Since Last Visit
- GAD-7 (Core)

With this release, the above-mentioned issue has been resolved. Now, the above mentioned documents are displayed only once in the Document Codes list screen.

Author: Savitha Siddaraju

66: Core bugs # 128075: Registration Document and Client Information: Primary Care Physician values were not displayed.

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

Prerequisite:

Create a new record by entering details except the first name and last name in 'Primary Care Provider Detail' screen.

Navigation Path 1: 'Client' -- 'Go Search' -- 'Registration document' -- 'Registration Document screen' -- 'Demographics tab' -- 'Primary Care Physician section' -- 'Primary Care Physician dropdown field'.

Navigation Path 2: 'Client' -- 'Go Search' -- 'Client Information' -- 'Demographics tab' -- 'Primary Care Physician section' -- 'Primary Care Physician dropdown field'.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the Registration Document and Demographics tab of the Client Information screens, the Primary Care Physician dropdown value was displayed as ",". This occurred whenever 'First Name' and 'Last Name' fields were empty in 'Primary Care Provider Detail' screen.

With this release, the above-mentioned issue has been resolved. Now, The Primary Care Physicians dropdown will display organization name in the Registration Document and Demographics tab of the Client Information screen, when 'First Name' and 'Last Name' fields are empty in 'Primary Care Provider Detail' screen.

Dynamic Forms (DFA)

Reference No	Task No	Description
67	Core Bugs # 128018	DFA Service Note does not include all the service details in the PDF header.
68	Core Bugs # 127343	A blank PDF is displayed when the user sign DFA Via Smartphone.
69	Core Bugs # 127843	Error information is not captured if any error occurred in DFA screens that has 'Globalcode' Dropdowns.
70	Core Bugs # 128014	Newly added columns not getting displayed in the 'Target Column' field present in the 'Column Mapping' tab of 'Initialization Editor' screen.

Author: Sunil Belagali

67: Core Bugs # 128018: DFA Service Note does not include all the service details in the PDF header.

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

Navigation Path: 'Client' -- 'Open DFA Service/Notes' -- 'Enter all the required details' -- 'Click on Save and Sign'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the PDF of signed DFA Service/Notes having a custom RDL 'RDLDFACommonReportCarePlanGoalAndObjectives.rdl', the Service details were not displayed in the PDF header.

With this release, the above-mentioned issue has been resolved. Now, when the user signs the DFA Service/Notes having a custom RDL 'RDLDFACommonReportCarePlanGoalAndObjectives.rdl', the service details are displayed in the PDF header.

Author: Sunil Belagali

68: Core Bugs # 127343: A blank PDF is displayed when the user sign DFA Via Smartphone.

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

Prerequisite: Configure the iPhone device dimensions in web application through the below **Path:**

'Mobile Web Application' -- 'Login page' -- 'Open Developer tools' -- 'Select Mobile View' -- 'Select any iPhone device'.

Navigation Path: 'Client' -- Select any 'DFA Documents/Service Notes' -- Click on Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user Signed any DFA Document/Service Note through the smartphone(iphone), the PDF was not displayed properly. Only the Signature was displayed, but the details entered were not displayed in the PDF.

With this release, the above-mentioned issue has been resolved. Now, when the user Signs any DFA Document/Service Note through the smartphone, the PDF is displayed properly.

Author: Sunil Belagali

69: Core Bugs # 127843: Error information is not captured if any error occurred in DFA screens that has 'Globalcode' Dropdowns.

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

Navigation Path: 'Client' search -- 'Documents/ServiceNotes' -- Select any 'DFA Document' or 'Service Note' that has global code Dropdowns.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The Errors generated in 'DFA screens' that have 'Globalcode' Dropdowns, were not being logged in the 'ErrorLog' table.

With this release, the above-mentioned issue has been resolved. Now, a logic is added to capture error information in Error Log table.

Author: Ashish Priyadarshi

70: Core Bugs # 128014: Newly added columns not getting displayed in the 'Target Column' field present in the 'Column Mapping' tab of 'Initialization Editor' screen.

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

Navigation Path 1: 'Administration' -- 'Form Building' -- 'Forms' -- 'New' -- 'DFA Editor screen' -- 'Enter the details' -- 'Save'.

Navigation Path 2: 'Administration' -- 'Initialization' -- 'Initialization' list page -- 'Initialization Editor' -- 'Column Mapping' tab'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The newly added columns were not displayed in the 'Target Column' field present in the 'Column Mapping' tab of 'Initialization Editor' screen, which were added through the 'Form Items' section present in the 'DFA Editor' screen for a form.

With this release, the above mentioned issue has been resolved. Now, the newly added columns are displayed in the 'Target Column' field present in the 'Column Mapping' tab of 'Initialization Editor' screen, which are added through the 'Form Items' section present in the 'DFA Editor' screen for a form.

Group Detail

Reference No	Task No	Description
72	Core Bugs # 128087	Groups – Unable to view the accessed groups when the client got deleted.

Author: Suganya Sivakumar

72. Core Bugs # 128087: Groups – Unable to view the accessed groups when the client got deleted.

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

Prerequisite: Group is created with more than one client.

Navigation Path 1: 'My Office' -- 'Managing Groups' -- 'Groups' List page -- Click on 'New Icon' -- 'Group Detail' Page -- 'Add the values in Required fields' -- Add Clients in 'Client section' -- Add Logged in 'Staff details' -- Click on 'Save' Icon.

Navigation Path 2: Execute a Query to Delete a Client from the SmartCare through the **path:**

Table Editor (Administration) – Execute Query to delete a client in the SmartCare (select * from clients where ClientID = xxyy) – Execute – set Recorddeleted column to Y – Save.

Navigation Path 3: 'My Office' -- 'Managing Groups' -- 'Group' List page -- 'Search for the Group which got created in Navigation Path 2'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When any of the Client from the Group was deleted from the SmartCare, the Group itself was not displayed on the Groups List page.

With this release, the above-mentioned issue has been fixed. Now, the Group List Page will display the Group even if the client is deleted from SmartCare.

Group Services

Reference No	Task No	Description
73	Core Bugs # 127918	The Red Flag was displayed for the client after erroring out the group service.
74	Core Bugs # 127867	Group Note Slowness.

Author: Niroop Hassan

73. Core Bugs # 127918: The Red Flag was displayed for the client after erroring out the group service.

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

Navigation Path: 'My Office' -- 'Groups' -- 'Groups' list page -- Click on 'New' icon -- 'Group Details' page -- Enter required data -- Click on 'Save' icon -- 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 -- Get the warning message by saving the page without having required data -- Select 'Error' from the 'Status' dropdown and click on 'Save' icon -- Click on 'Add Client from Rooster' button -- 'Group Service Client Popup' -- Select the same client and click on 'Select' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user added back the client from 'Add Client from Rooster' after erroring out the group service, the Red Flag was displayed for the client under the Group service screen.

With this release, the above-mentioned issue has been resolved. Now, when the user adds back the same client after erroring out the group service, the Red Flag is not displayed for the client under the Group service screen.

Author: Niroop Hassan

74. Core Bugs # 127867: Group Note Slowness.

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

Navigation Path: 'My Office' -- 'Group Services' screen -- Click on the 'DOS' hyperlink -- 'Enter Data, Click on Save' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user entered the data in the Group Service Details screen and clicked on the Save icon to save the data, the system was taking more time to Save.

With this release, the above-mentioned issue has been resolved. Now, when the user enters the data in the Group Service Details screen and clicks on the Save icon to save the data, the data is saving without any slowness.

Health Data Sub Templates

Reference No	Task No	Description
75	EII # 126623	Vitals Common User Control - Add Pulse Oximetry as sub-template to Pulse.

Author: Aishwarya Bommaklar

75. EII # 126623: Vitals Common User Control - Add Pulse Oximetry as sub-template to Pulse.

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

Navigation Path: 'My Office' -- 'Health Data Sub Templates' screen -- Select 'Pulse Sub Template' -- Click on 'Template Name' hyperlink -- check for 'Pulse Oximetry (SpO2)'.

Functionality 'Before' and 'After' release:

Purpose: To obtain the client's Pulse Oximetry and record it in their chart during the visit.

With this release, the Pulse Oximetry (SpO2) is added as a Sub Template for Pulse Sub template.

Creating Sub-Template

Naming The Template

Name Of Template

☒ Active
☐ Inactive
☒ Heading

Add Health Data

Select Health Data Category

Select Health Data

Add

Health Data	Display*	Single Line	Order*	Select Parameter	Validate*
X Pulse	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1		<input type="checkbox"/>
X Pulse Oximetry (SpO...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2		<input type="checkbox"/>

Inquiries

Reference No	Task No	Description
76	Core Bugs # 128036	Inquiries (My Office) - Multiple Dispositions not showing when the Inquiries list page is exported to an Excel sheet.
77	Core Bugs # 128010	Server name was inserted for ModifiedBy column in the ClientCoveragePlans table on saving Inquiry.

Author: Kiran Tigarimath

76. Core Bugs # 128036: Inquiries (My Office) - Multiple Dispositions not showing when the Inquiries list page is exported to an Excel sheet.

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

Navigation Path: 'My Office' -- 'Inquiries' List page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The exported Excel sheet of the 'Inquiries' list page only displayed one disposition, despite the client having multiple dispositions in the particular client's 'Inquiry Details' screen.

With this release, the above-mentioned issue is resolved. Now, all the dispositions related to the particular client's inquiry will be displayed in separate rows in the exported Excel sheet of the 'Inquiries' screen.

Author: Akshay Viswanath

77. Core Bugs # 128010: Server name was inserted for ModifiedBy column in the ClientCoveragePlans table on saving Inquiry.

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

Navigation Path: 'Inquiry' -- 'Inquiry details' screen -- 'Insurance' tab -- 'Add/Modify coverage plan'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a staff added or modified the coverage plan in 'Insurance' tab of 'Inquiry Details' screen, the server name was inserted in the 'Modified By' column in the ClientCoveragePlans table.

With this release, the above-mentioned issue has been resolved. Now, the Staff name is displayed in ModifiedBy column in the ClientCoveragePlans table whenever Staff adds or modifies the coverage plan in 'Insurance' tab of 'inquiry details' screen.

Letter Templates

Reference No	Task No	Description
78	Core Bugs # 127498	PCP Letter Text Template: Issues with Spaces and Formatting are not clean like a formal letter.
79	Core Bugs # 127910	PCP Letter template: DOB and spacing issues.

Author: Kiran Yogendra

78. Core Bugs # 127498: PCP Letter Text Template: Issues with Spaces and Formatting are not clean like a formal letter.

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

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

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user signed the 'PCP Letter', there was a spacing issue between the lines and the sections.

With this release, the above-mentioned issue has been resolved. Now, the PCP Letter is designed in a standard business letter format without any extra spaces.

Author: Kiran Yogendra

79. Core Bugs # 127910: PCP Letter template: DOB and spacing issues.

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

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

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user signed the 'PCP Letter', the below the issues were found:

1. The Client's Date of Birth was appended with time as well.
2. There was a lot of space between each section.

With this release, the above-mentioned issues have been resolved. Now, only the Date of Birth is displayed, and the spacing between each section is condensed to a standard format.

Reception Views

Reference No	Task No	Description
80	EII # 126640	Implementing a kiosk/contactless type check in that allows clients to Check in for Services and Update demographic information.

Author: Niroop Hassan

80. EII # 126640: Implementing a kiosk/contactless type check in that allows clients to Check in for Services and Update demographic information.

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

Navigation Path 1: 'Contactless Check in' page -- Enter details and click on 'Submit' page -- 'Appointments for Today' page.

Navigation Path 2: 'My Office' -- 'Reception/Front Desk' page -- 'Reception/Front Desk' list page.

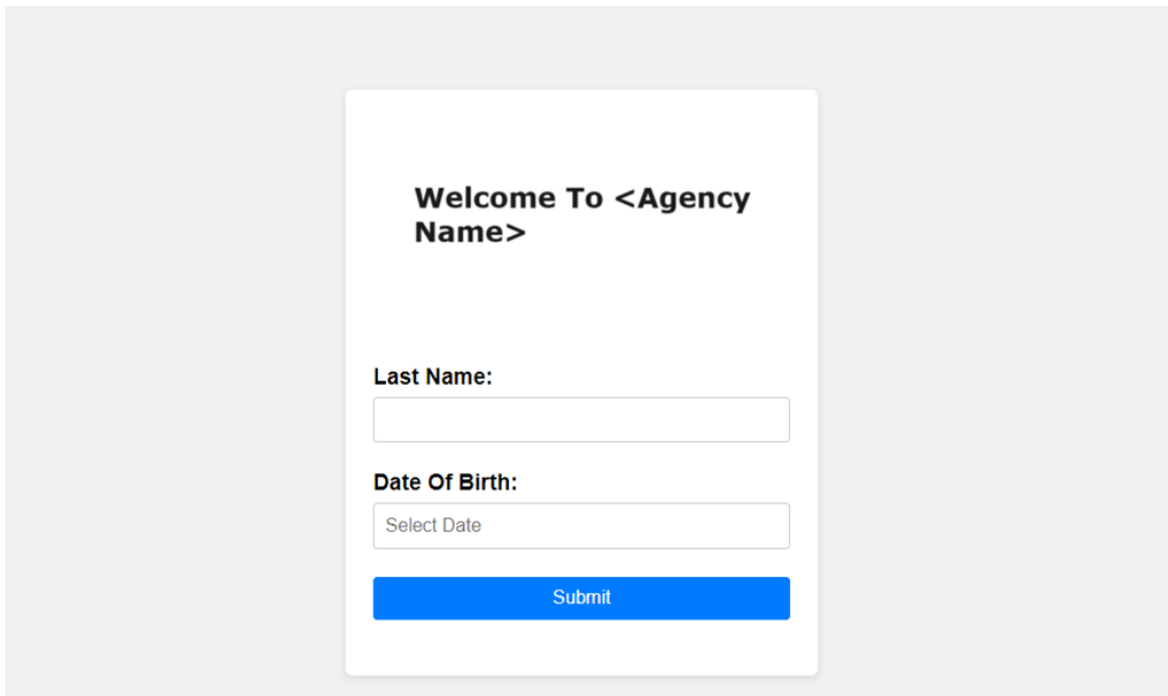
Functionality 'Before' and 'After' Release:

Purpose: 'To Support kiosk/contact type check in to free front desk Staff, so that they can do other duties such as reschedule appointments, phone calls, enquiry questions etc. This will save significant amount of time for front desk Staffs'.

With this release, the following changes have been implemented to support kiosk/contactless type check.

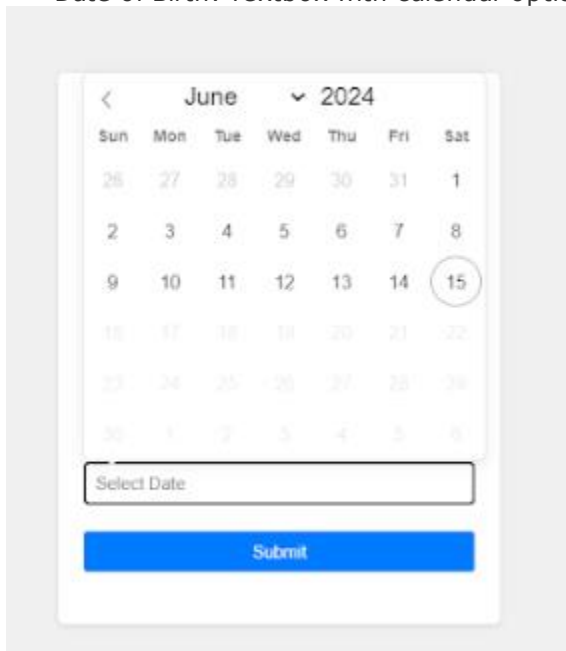
1. 'Contactless Check-in' page.
2. 'Appointments For Today' page
3. System configuration key 'SetMinutesPriorToWhichCheckInIsEnabled.'

1. 'Contactless Check-in' page:



'Contactless Check-in' page consists of the following fields:

- Welcome to <Agency Name>: Label
- Last Name: Textbox
- Date of Birth: Textbox with calendar option. (on click of Select Date, Calendar option is displayed)

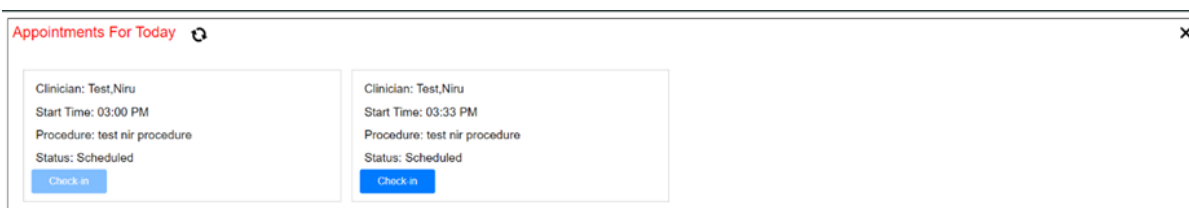


- Submit: Button: On click of Submit button:
 - If more than one match is found i.e., if there is more than one Client with the information entered who has appointments for that day, the following message will be displayed: **Message:** "Unable to Authenticate. Please contact the front-desk"

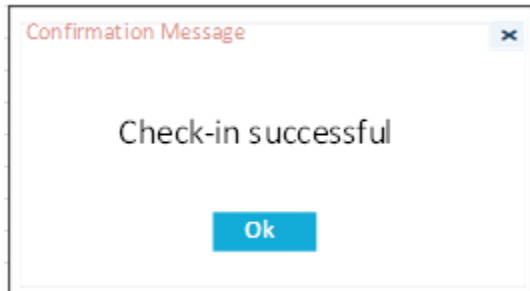
- If there is only one match found among the Clients who have appointments for that day, the Appointments for Today page is displayed. This page will display the list of appointments for the Client for that day.
- If there is no match found i.e., if there are no Clients with the entered information who has appointments that day, the following message is displayed:

Message: "There are no Appointments for today that matches the information entered."

'Appointments For Today' page:



1. Check-in: Button: This will be enabled only few minutes prior to the Service scheduled time and this will be driven by a configuration key value.
2. On click of Check-in button:
 - The Service status will be changed from "Schedule" to "Show" and a notification will be displayed on the Staff dashboard.
 - A pop up with the confirmation message "Check-in successful" will be displayed.



- If the user clicks on "OK" or closes the pop up, the page will be refreshed and navigates the user back to the home page. `
 - If the pop-up message is not acknowledged by user and the screen is left idle for 1 minute, then the page will be refreshed and navigates back to home page.
3. If the user does not performs any action on the "Appointments For Today" screen, then after 1 minute, the screen will automatically refresh and navigates back to the home page.
 4. For the appointments of that day that are past the scheduled time, the Check-in button will be disabled.
 5. If the user clicks on Close button in "Appointments For Today" screen, then the screen refreshes and navigates back to the Home page.

System configuration key 'SetMinutesPriorToWhichCheckInIsEnabled':

Configuration Key Details

Configuration Keys

Key

SetMinutesPriorToWhichCheckInIsEnabled

SourceTableName

Module

SCM Admin 2/ Manage Reception Views

Screen

Appointments For Today (1000396)

30

Value

Description

Read Key as: Set number of minutes prior to which Check In button is enabled for Services

This is a new screen and feature being implemented in the core product to control the Check-in button's availability for kiosk-based appointments. This feature introduces a system configuration key that determines how many minutes before the Client's scheduled service time the "Check-in" button becomes enabled on the "Appointments For Today" screen.

The default value is set to "30", which means the "Check-in" button on the Appointments For Today screen will become enabled 30 minutes before the scheduled Service time.

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 "30".

Comments

Please enter your special instructions or comments...

Key Details

Key: SetMinutesPriorToWhichCheckInIsEnabled

Read Key as: Set minutes prior to which Check In button is enabled for Services.

Allowed Values: Any whole number i.e. 1 or above.

Default Value: 30

Modules: SCM Admin 2/ Manage Reception Views.

Description: This is a new feature being added to the core product by introducing a system configuration key. This key will be used to determine how many minutes before the Service scheduled time the Check-in button must be enabled (on Appointments For Today screen) for Clients who check-in for Services via the Kiosk.

- If the key-value is set to "30", the "Check-in" button in Appointments For Today screen will be enabled 30 minutes prior to the Service time. This will be the default value of the key.
- If the key-value is set to "Any whole number", the "Check-in" button will be enabled that many number of minutes prior to the Service time.

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 "30".

Methadone

Reference No	Task No	Description
81	EII # 127500	MAT: Ability to make MAT schedule required before signing client order
82	EII # 127587	Implementation to add option on MAT Dispenser Detail setup for Daily Calibration
83	EII # 127717	'MAT Management Details' page: Changes to display the number of 'No Show' (missed dispenses) in red font.
84	EII # 127774	MAT: Implementation to add calendar to dispense screen
85	EII # 124914	Changes in the 'Client Order Detail' screen & MAT: Dispense (Patient Safety Check) screen.
86	EII # 126835	New 'Medication Assisted Treatment' section in Order Details.
87	EII # 127507	MAT Management Details: Modification to show last 4 of SSN and Dosing information more visible.

Author: Madhu Basavaraju

81. EII # 127500: MAT: Ability to make MAT schedule required before signing client order.

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

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

Navigation Path 2: 'Administration' -- 'MAT Configuration' screen -- 'General' Tab -- Select 'Require schedule selection before signing client order' checkbox under 'General' section.

Navigation Path 3: 'My Office' -- 'Medication/Lot/Bottle' list page -- New -- 'Medication/Lot/Bottle Details' screen -- Enter the required fields -- Insert -- Save.

Navigation Path 4: 'My Office' -- 'MAT Dispenser' list page -- New -- 'MAT Dispenser Detail' screen -- 'General' tab -- Enter the required fields -- Save.

Navigation Path 5: 'Client' -- 'Client Orders' -- 'Client Orders' list page -- New -- 'Client Order details' screen -- Select the Order created in Navigation Path 1 -- Enter the required fields -- Insert -- Save and sign.

Functionality 'Before' and 'After' release:

Purpose: Adding a validation to ensure the schedule is selected prior to 'Client Order' signature for MAT medications.

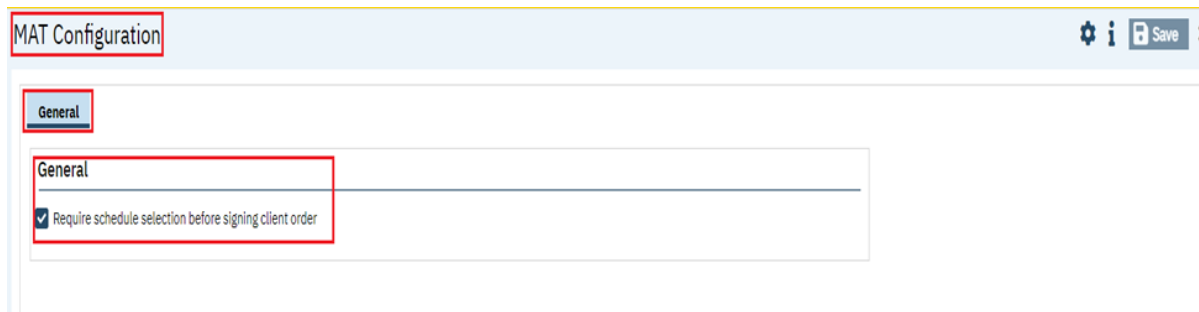
With this release, 'Require schedule selection before signing client order' validation is implemented to ensure the schedule is selected prior to 'Client Order' signature for MAT medications.

For the validation to be displayed, the below mentioned changes have been implemented:

1. MAT Configuration:

a. A new Admin screen MAT Configuration has been implemented with the General section.

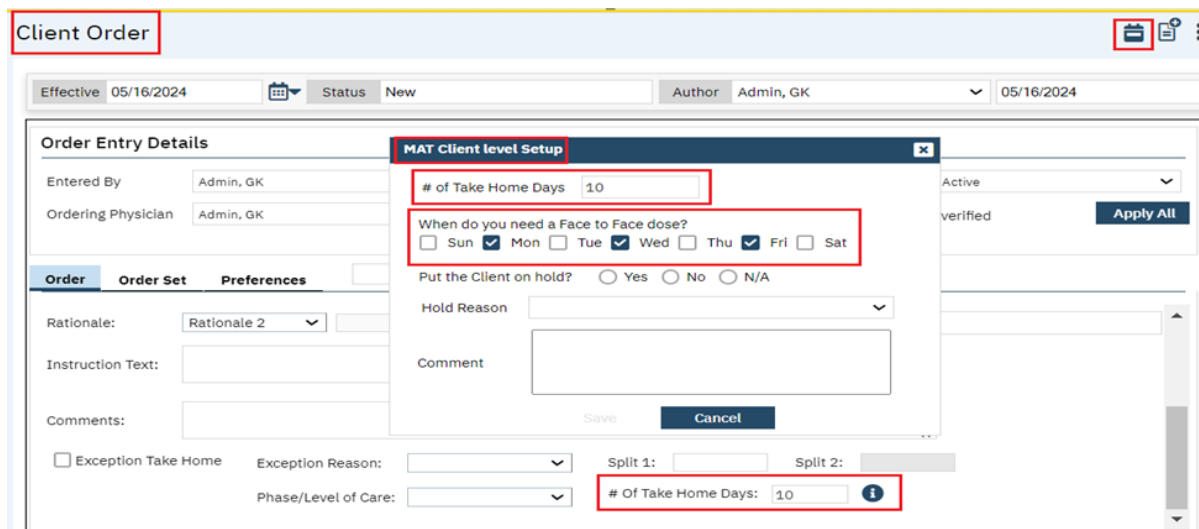
In the General section "Require schedule selection before signing client order" check box will be displayed. By default, it should be enabled and unchecked.



The screenshot shows the 'MAT Configuration' window with the 'General' tab selected. A red box highlights the 'General' section header. Another red box highlights the checkbox labeled 'Require schedule selection before signing client order', which is currently checked.

b. This checkbox will be used to turn on/off the validation for the field "When do you need a Face-to-Face dose?" in MAT Client Level Setup pop up. This needs to be updated before signing the client order.

2. 'MAT Client Level Setup popup': When the '# of Take Home Days' has value in the Client Order Detail screen, this will Auto Populate the '# of Take Home Days' field in the popup (Click on MAT Client level Setup icon for the pop up to be displayed) on click of 'Insert' whether the Client Order is saved or not.



The screenshot shows the 'Client Order' screen with the 'MAT Client level Setup' popup open. Red boxes highlight several key elements: the 'Client Order' title bar, the 'MAT Client level Setup' popup title bar, the '# of Take Home Days' field (populated with 10), the 'When do you need a Face to Face dose?' section with checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat (Mon, Wed, and Fri are checked), the 'Put the Client on hold?' section, and the '# Of Take Home Days' field at the bottom of the popup (populated with 10).

3. 'Please select Day(s) when do you need a Face- to-Face dose' Validation message:

- On Signing a Client Order without saving the schedules (without selecting any check box for "When do you need a Face-to-Face dose?" in the MAT Client level Setup pop up) this validation to be displayed.

- This validation is configured based on "Require schedule selection before signing client order" checkbox. If the checkbox is checked, then the Validation will be displayed. Else, the validation is not displayed.
- This Validation will be displayed only for MAT orders, where the 'Take Homes' are specified.

The screenshot displays the Streamline Healthcare software interface. A 'Validations' pop-up is visible in the top left, containing the text: 'Please select Day(s) When do you need a Face-to-Face dose'. Below it, the 'MAT Client level Setup' pop-up is open, showing fields for '# of Take Home Days' (set to 10), 'When do you need a Face to Face dose?' (with checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat), 'Put the Client on hold?' (radio buttons for Yes, No, N/A), 'Hold Reason' (dropdown), and 'Comment' (text area). At the bottom of the 'MAT Client level Setup' pop-up, there are 'Save' and 'Cancel' buttons, and a field for '# Of Take Home Days' (set to 10) with an information icon. The background shows the main application window with a sidebar on the left and a top navigation bar.

Author: Sithara Ponnath

82. EII # 127587: Implementation to add option on MAT Dispenser Detail setup for Daily Calibration.

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

Navigation Path 1: 'My Office' -- 'MAT Dispenser' screen -- Click on 'New' icon -- 'MAT Dispenser Details' -- Enter a machine name and other required data -- Go to 'Calibration' tab -- 'How often do you calibrate the machine?' field -- Click on dropdown and select the value 'Daily' -- Click on 'Save' button.

Navigation Path 2: 'My Office' -- 'MAT Management' screen -- Click on 'Connect' icon-- Select a 'Machine'.

Navigation Path 3: 'My Office' -- 'MAT Management' screen -- Click on 'Calibrate' icon -- Answer all the questions displaying in the pop-up -- Click 'Yes' for displaying the 'Pump Calibration Test' report PDF.

Functionality 'Before' and 'After' release:

Purpose: A new option "Daily" is added to the field- "How often do you calibrate the machine?" for Daily Calibration, which was not present earlier.

With this release, the below functionalities have been implemented in the 'MAT Dispenser Details' screen.

- A new option 'Daily' is added in the 'How often do you calibrate the machine?' dropdown field under the 'Schedule' section of 'Calibration' tab.

MAT Dispenser Detail

General
User/Operation Log
Instruction Messages
Calibration

Machine Details

Machine Name
Machine1_Sponnath
Model/Manufacturer
Ivek
Active

Location
office1
Deactivation Date

Indicators
Low (Yellow)
100
mg
Very Low (Red)
50
mg

Comments

'Calibration' tab: Daily option value is added in 'How often do you calibrate the machine?' dropdown

MAT Dispenser Detail

General
User/Operation Log
Instruction Messages
Calibration

General

Number of dispenses
Average amount per dispense
mg
Total dispense amount
mg

Schedule

How often do you calibrate the machine?
Once a Week
Twice a Week
Monthly
Daily

Sun
Mon
Tue
Wed
Thu
Fri
Sat

of every
month(s)

- Upon selecting the option 'Daily', the checkboxes for all the days of the week will be greyed out (read-only) and each of them will be auto checked.
- The 3 fields below to set recurrence pattern will be blank and greyed out (read-only).

MAT Dispenser Detail

General User/Operation Log Instruction Messages Calibration

General

Number of dispenses 20 Average amount per dispense 4 mg Total dispense amount 80 mg

Schedule

How often do you calibrate the machine? Daily ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat

of every month(s)

- Upon connecting a user by clicking on 'Connect User' icon, a calibration due message will be displayed while selecting the 'Machine' name in the 'MAT Management' screen. The calibration due message will be displayed every day.

Message: "Machine due for Calibration".

MAT Management (3)

Date 04/03/2024 Program All Programs Orders All Orders Apply Filter

Client Search

Client Name Flags

Test..(2104845) Test_ClientMAR... Test_TestShivka...

SmartCare

Connection Details

Machine SmartCare

Medication

Lot Machine due for Calibration.

Bottle

Quantity

OK

Connect Prime New Cancel

- Once the machine calibration is done, its information will be displayed in the 'Pump Calibration Test' report. And if again clicking on 'Calibrate' icon and selecting the Machine, will not display the 'Machine due for Calibration' message.

Choosing the machine name (Machine1_Sponnath) for calibration after clicking on 'Calibrate' icon .

MAT Management (3)

Date: 04/03/2024 | Program: All Programs | Orders: All Orders | Apply Filter

Client Search: | Status: All Statuses | Flag Type: All Flag Types

Client Name	Flags	SmartCare	Methadone 40mg...
Test..(2104845)			
Test_ClientMAR...			
Test_TestShivka...			

Choose a Machine to Calibrate | Machine1_Sponnath

OK | Cancel

The 'Pump Calibration Test' report will display the machine name (Machine1_Sponnath) in the report.

PumpCalibrationT... | 1 / 1 | 33% |

Pump Calibration Test Report

Date	Machine Name	Time of Calibration	Test Number	Test Volume (mgs)	Result Volume of Test (mgs)	Difference between Test and Result Numbers (mgs)	Average Volume of Test (mgs)	Number of Dispenses in Test
04/03/2024	Machine1_Sponnath	03:56 PM	2	20	4	26	4	20

Author: Madhu Basavaraju

83. EII # 127717: 'MAT Management Details' page: Changes to display the number of 'No Show' (missed dispenses) in red font.

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

Navigation Path 1: 'Administration' -- 'Orders' -- 'Orders' list page -- click on 'New' -- 'Order Details' screen -- Select 'Medication' Order Type -- Enter the required fields -- Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes under 'Medication Assisted Treatment' section -- Click on 'Save'.

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

Navigation Path 3: 'My Office' -- 'MAT Dispenser' list page -- Click on 'New' icon -- 'MAT Dispenser Detail' screen -- 'General' tab -- Enter the required fields -- click on 'Save'.

Navigation Path 4: 'Client' search -- 'Client Orders' -- 'Client Orders' list page -- New -- 'Client Order Details' screen -- Select the Order created in Navigation Path 1 -- Enter the required fields -- 'Insert' -- 'Save' and 'Sign'.

Navigation Path 5: 'My Office' -- 'MAT Management' list page -- Click on the 'Dispense' icon for the 'Client' Medication to be dispensed -- 'MAT Management Details' screen.

Functionality 'Before' and 'After' release:

Purpose: To indicate if the Client missed their last dispense and display it in a red font. This will show the dispense missed for number of consecutive days and will reset once a dose is given.

With this release, the below implementation has been done in the 'MAT Management Details' screen under the 'General' tab:

1. In the 'Dispense Information' section, the 'Client has missed x dispense(s)' message (Read only Label) is in bold red font, when the below-mentioned conditions are met:
 - a. When the Client missed their last Dispense.
 - b. The 'Client has missed x dispense(s)' message will not appear when the client receives their last scheduled dispense which includes all types of Take homes (Exception and split).
 - c. From the Last Dispense to the Current Filtered date,
 - i. Calculate the misses and display the number of Consecutive dispense misses (No shows).
 - ii. The 'Client has missed x dispense(s)' message will not displayed if the previous day is not a 'No show'.
 - d. Reset this value to 'zero' each time the Client gets their dispense and recalculate.

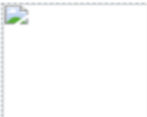
Eg: Client Missed will be shown as below:

The number of dispenses is based on consecutive misses. i.e. if the client dispensed on 3/1, missed on 3/2, and then arrives for dispense on 3/3, then the number of misses = 1. If the client dispensed on 4/1, missed on 4/2 and 4/3, and then arrives for dispense on 4/4, then the number of misses is 2.

MAT Management Details

General

Client Information



Client Name: Mat, Madhu

DOB: 01/01/2000

SSN: 2111

Next Appt Date:

Primary Clinician:

Date Signed: 05/20/2024

SignedBy Name: Raj, Madhu

Dose : 3 mg

Methadone 10/5ml 10 mg/5 mL

Lot #: Dec 27 Lot 6

Bottle #: 6

2192.50 mg

Dispense Information

Client has missed 3 dispense(s)

Dispense Date: 05/20/2024

Order End Date: 05/20/2024

Dispense History

05/16/2024 12:00 AM, 3 mg, Dispensed, Admin, GK

Scheduled

No data to display

Print Labels

05/20/2024

T!

3 mg

Author: Chaitali Patil

84. EII # 127774: MAT: Implementation to add calendar to dispense screen.

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

Prerequisite: Schedule the Medication for the number of days based on the below **System configuration key**

'MARAutoScheduleDays'.

For e.g.: If Client Order is signed for 10 days and above configuration key value is set for 7 days, then only for 7 days medication will be scheduled. For rest 3 days, the medication will not be scheduled.

Note: If we want to change the configuration key value like for 21 days, then after saving we need to run below stored procedure in database.

Store Procedure: exec ssp_createmardetails

Once the stored procedure is run, the MAT/MAR record will be created for 21 days, if the client order is signed for 21 days.

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

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

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

Navigation Path 4: 'My Office' -- 'MAT Management' list page -- Connect to Machine/Inventory -- Click on 'Dispense' icon for the 'Client' Medication to be dispensed -- 'MAT Management Details' screen -- Sign -- under 'General' section 'Date' dropdown field will be added.

Functionality 'Before' and 'After' release:

Purpose: Date filter is added in the dispense screen (MAT Management Details screen). If a dose needs to be changed for a client (clinic to take home, etc.), rather than navigating to the list page (exit specific client, change the date, navigate back in), this would be done on the dispense screen (MAT Management Details screen). This would eliminate the requirement of navigating to the list page.

With this release, a new 'Date' dropdown field is added in the MAT Management Details screen. And based on this medication scheduled date, Date will be displayed in the newly added date dropdown field.

1. In this dropdown field, the date will be displayed in MM/DD/YYYY format.
2. The date that is selected on the MAT Management list page will be the default value for this filter.
3. The dates for which the order has been scheduled through the daily nightly job will be displayed in this drop-down and only Current & Future Dates will be displayed of the orders that has been scheduled.
4. All of the scheduled orders dates will be displayed, and the users will be able to switch back and forth between the dates from today's date.
5. Based on the date selected in the 'Date' drop-down, the entire Details page will be loaded.

Set the value in configuration key details: MARAutoScheduleDays

Configuration Key Details

☒ Allow Edit

Configuration Keys

Key	MARAutoScheduleDays
SourceTableName	
Module	
Screen	7
Value	
Description	<p>i</p> <p>+ MARAutoScheduleDays - Client MAR (Medication Administration Record) is the client level banner and it is used by the care provider for recording and viewing the MAR instructions for prescribed drugs with the status (like "Given", "Refused", "Not Given" and others). The MAR record is created by NIGHTLY JOB or ON DEMAND and the system utilizes the value for this key - MARAutoScheduleDays to determine how many days from current should the system create the MAR records. VALUE: The values correspond to number of day(s). Ex: Value of 1 is equal to 1 Day. • If the value of this key is 1, then the MAR record will be created for the current day • If the value of this key is 2, then the MAR record will be created for current day plus the next day</p>
Comments	Please enter your special instructions or comments...

Enter the details in Medication/Lot/Bottles Details: for Pindolol 10 mg

Medication/Lot/Bottle Details

General

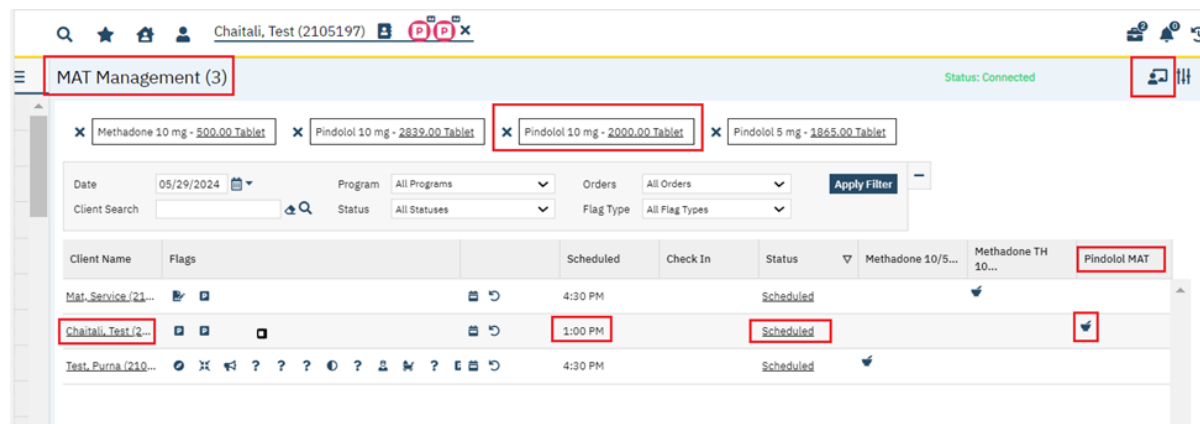
General

Medication/Strength	pindolol 10 mg tablet		
Potency Unit	Tablet	Units	mg <input type="checkbox"/> Liquid
Manufacturer	Merck and Co., Inc.		
Lot #	500	i	
Bottle/Box #	500		
Expiration Date	05/30/2025		
Description	ok		
Quantity On Hand (mg)	2000	Quantity On Hand (ml)	0
Location	testchaitali		
Client	Chaitali, Test (2105197)		

The MAT Client Order Scheduled Details will be displayed in the PDF. Pindolol MAT Medication scheduled from 29 May 2024 to 4 June 2024

Client Information			
Client Name:	Chaitali, Test	Client ID:	2105197
DOB:	05/12/1981	Effective Date:	05/29/2024
Active Medication: Pindolol (Pindolol MAT)			
Client Order Id: 4379			
Entered By: Patil, Chaitali		Ordering Physician: Patil, Chaitali	
Order Status: Active		Order Mode: Electronic	
Medication: PINDOLOL (PINDOLOL MAT) , 10mg, Tablet, Oral Tablet 4 each Once (40mg Total)			
Schedule/Start: 05/29/2024 01:00PM		End Date: 06/04/2024 11:59PM	
Day Supply: 7		Refill: 4	
Priority: Routine		Frequency: Once	
May Use Own Supply: No		Self Administered: No	
Consent Required: No		Stock Medication: No	
Rationale: Aggression		Dispense Brand: No	
Potency Units: Tablet			
Max Quantity Allowed in 24 hours: 1			
Dispense Quantity: 28.00			
Exception Take Home: Yes		Exception Reason: Financial issues	
Split 1:		Split 2:	
Phase Level of Care: Phase 2		No of Take Home Days: 7	

MAT order is scheduled for respective client and will be displayed in MAT Management List Page :



The screenshot shows the MAT Management interface. At the top, there's a search bar with 'Chaitali, Test (2105197)' and a status indicator 'Status: Connected'. Below this, a table lists scheduled MAT orders. The table has columns for Client Name, Flags, Scheduled, Check In, Status, and Medication. The row for 'Chaitali, Test' is highlighted, showing a scheduled time of 1:00 PM and a status of 'Scheduled'. A red box highlights the 'Pindolol MAT' medication name in the table. Another red box highlights the 'MAT Management (3)' tab in the top navigation bar.

After clicking on dispense icon in the MAT Management screen, the MAT Management Details page will be opened, and Date dropdown will be displayed.

Search, Star, Home, User, Chaitali, Test (2105197), P, P, X

MAT Management Details

General

General

Date: 05/29/2024

Client Info

Client Name: Chaitali, Test
DOB: 05/12/1981
SSN: 3513
Next Appt Date:
Primary Clinician:
Date Signed: 05/29/2024
SignedBy Name: Patil, Chaitali

Dose : 40 mg

Pindolol MAT 10 mg
Lot #: 500
Bottle #: 500
2000.00 mg

Details Page Screenshot:

Search, Star, Home, User, Chaitali, Test (2105197), P, P, X

MAT Management Details

General

General

Date: 05/29/2024

Client Info

Client Name: Chaitali, Test
DOB: 05/12/1981
SSN: 3513
Next Appt Date:
Primary Clinician:
Date Signed: 05/29/2024
SignedBy Name: Patil, Chaitali

Dose : 40 mg

Pindolol MAT 10 mg
Lot #: 500
Bottle #: 500
2000.00 mg

Dispense Information

Dispense Date: 05/29/2024 Order End Date: 06/04/2024

Dispense History

No data to display

Scheduled

No data to display

Print Labels

05/29/2024	05/30/2024	06/01/2024	06/02/2024	06/03/2024	06/04/2024
✓	T1	T1	T1	T1	T1
40 mg	40 mg	40 mg	40 mg	40 mg	40 mg

Also, the below changes are implemented to the existing functionality:

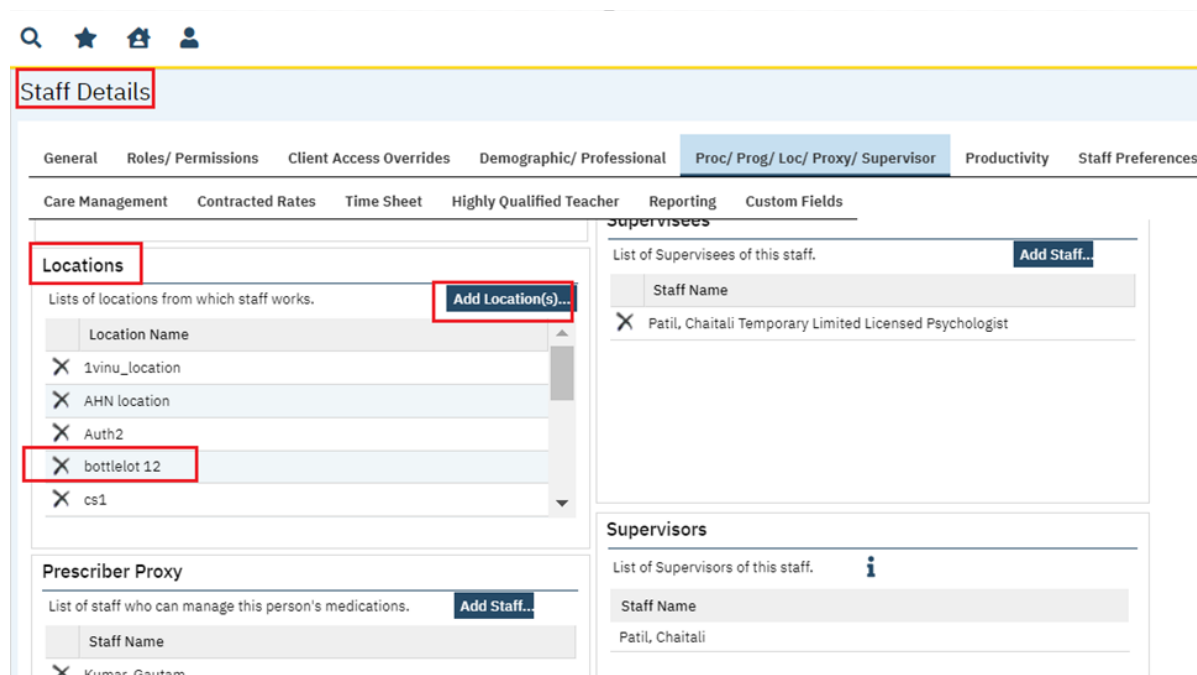
In the Medication Inventory Transaction Detail screen, as per the Medication/Strength 'Location', which is added in Medication/Lot/Bottle screen based on that 'Lot #' will be displayed, and after selecting a Lot #, the Bottle/Box and quantity will be displayed.

Prerequisite: Create one 'Location', and link that Location to the staff through below **path**:

Navigation Path 1: Go search -- Admin 'Location' -- Click on 'New' -- fill required field -- Save.

Navigation Path 2: Go search -- Admin Staff/User -- filter for respective staff and select staff -- Navigate to Proc/Prog/ Loc/Proxy/Supervisor tab -- Add path 1 Location under the location section -- click on save.

Location linked to the staff



Staff Details

General Roles/ Permissions Client Access Overrides Demographic/ Professional **Proc/ Prog/ Loc/ Proxy/ Supervisor** Productivity Staff Preferences

Care Management Contracted Rates Time Sheet Highly Qualified Teacher Reporting Custom Fields

Locations

Lists of locations from which staff works. **Add Location(s)...**

Location Name
X 1vinu_location
X AHN location
X Auth2
X bottlelot 12
X cs1

Supervisors

List of Supervisees of this staff. **Add Staff...**

Staff Name
X Patil, Chaitali Temporary Limited Licensed Psychologist

Supervisors

List of Supervisors of this staff. **i**

Staff Name
Patil, Chaitali

Prescriber Proxy

List of staff who can manage this person's medications. **Add Staff...**

Staff Name
X Kumar, Gautam

Create record of 'Medication/Lot/Bottle' using below **path**:

Navigation Path 3: My Office -- 'Medication/Lot/Bottle' list page -- New -- 'Medication/Lot/Bottle Details' screen -- Enter the required fields -- Add Navigation Path1 Location and add client -- Save.

'Medication/Lot/Bottle' and Location Details:

Medication/Lot/Bottle Details

General

General

Medication/Strength
maca extract 500 mg capsule

Potency Unit
Capsule
Units
mg
Liquid

Manufacturer
Merck and Co., Inc.

Lot #
100

Bottle/Box #
100

Expiration Date
05/24/2025

Description
ok

Quantity On Hand (mg)
500
Quantity On Hand (ml)
0

Location
bottlelot 12

Client
Test, Primary22 (5028)

Navigation Path 4: Go search -- My Office -- Medication Inventory Transaction -- Click on 'New' -- search for Navigation path 3 medication in Medication/Strength field -- select respective medication and check in the Lot # field - Lot# will be displayed based on the location. And after selecting a Lot#, Bottle/Box# and Quantity will be displayed in dropdown.

In the Medication Inventory Transaction Detail screen, as per the Medication/Strength 'Location', which we have added in Medication/Lot/Bottle' screen based on that 'Lot#' will be displayed, and after selecting a Lot # the Bottle/Box# and quantity will be displayed.

Medication Inventory Transaction Detail

Transaction Detail

Transaction Detail

Transaction Date
05/30/2024

Medication/Strength
maca extract 500 mg capsule - 500.00 (bottlelot 12)

Expiration Date
05/24/2025
Manufacturer
Merck and Co., Inc.

Transaction Type

Lot #
100
Bottle/Box #
100

Transfer To Lot #
100
Transfer To Bottle/Box #

Quantity
500 mg
Reason

Comment

Client

1: On the MAT Management List Page, before completing Lab orders, Lab orders are displaying in flag icon :

The screenshot shows the MAT Management List Page. At the top, there is a search bar and a filter section. The table below has columns for Scheduled, Check In, Status, 10Threshold Met..., Methadone, Methadone 10/5m..., Methadone 10mg/..., Methadone Oral, Suboxone, and MAT Lab order 1. The 'MAT Lab order 1' column contains a flag icon in the first row.

Scheduled	Check In	Status	10Threshold Met...	Methadone	Methadone 10/5m...	Methadone 10mg/...	Methadone Oral	Suboxone	MAT Lab order 1
2:00 PM		Scheduled							Flag
11:30 PM		Scheduled							Flag
11:30 PM		Scheduled							Flag
4:00 PM		Scheduled							Flag
6:30 PM		Scheduled							Flag
8:00 PM		Scheduled							Flag
11:30 PM		Scheduled							Flag

2. On the MAT Management List Page after completing the 'Lab' Orders previously, the green tick' icon was displayed. Now, after completing the 'Lab' orders, 'Blue tick' icon will be displayed as per the new standard.

The screenshot shows the MAT Management List Page after completing the 'Lab' orders. The table now has a green tick icon in the 'MAT Lab order 1' column for the first row.

In	Status	Acetadote_MAR_S...	Angiomax	Aspercreme Max	Methadone 10/5	Methadone 10mg/...	Methadone Oral	Pindolol MAT	Suboxone	Complement C4,...	MAT Lab order 1
Scheduled											Green Tick
Completed											Green Tick
Scheduled											Blue Tick
Scheduled											Blue Tick
Scheduled											Blue Tick

Scheduled	Check In	Status	10Threshold Met...	Methadone	Methadone 10/Sm...	Methadone 10mg/...	Methadone Oral	Suboxone	MAT Lab order 1
11:30 PM		In Progress							✓
11:30 PM		Scheduled							
6:00 PM		Scheduled							
11:30 PM		Scheduled							
6:00 PM		Scheduled							
6:30 PM		Scheduled							
6:00 PM		Scheduled							

Author: Madhu Basavaraju

85. EII # 124914: Changes in the 'Client Order Detail' screen & MAT: Dispense (Patient Safety Check) screen.

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

Navigation Path 1: 'Administration' -- 'Orders' - 'Orders' list page -- click on the 'New' icon -- 'Order Details' screen -- Select 'Medication' Order Type -- Enter the required fields -- Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes and Enter 'Dose Threshold in mg' Value under 'Medication Assisted Treatment' section -- click on 'Save'.

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

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

Navigation Path 4: 'Client' search -- 'Client Orders' -- 'Client Orders' list page -- click on the 'New' icon -- 'Client Order Details' screen -- Select the Order created in Navigation Path 1 -- Enter the required fields -- 'Insert' -- 'Save' and 'Sign'.

Navigation Path 5: 'My Office' -- 'MAT Management' list page -- Click on the 'Dispense' icon for the 'Client' Medication to be dispensed -- 'MAT Management Details' screen.

Functionality 'Before' and 'After' release:

Purpose: Ability for SmartCare to check the last dispense for the patient and notify the user (Nurse at the Dispense/Re-Dispense Screen) that the increase or decrease has exceeded a set amount (Min and Max) for the nurse to receive a warning.

With this release, the below implementation has been done:

1. 'Client Order Details' screen:

1. In the 'Client Order Detail' screen, the 'Patient Safety Acknowledgement (Warnings popup)' is displayed on signing the order.
 - a. The 'Patient Safety Acknowledgement (Warnings) Popup' will be displayed only when the 'Dose threshold in 'mg' value is set in the 'Order Details' screen.
 - b. When there is a difference between the current amount dispensed and the last amount dispensed for the client that exceeds a maximum threshold increase or decrease, a below-the 'Patient Safety Acknowledgement (Warnings) popup will be triggered.
 - c. In the 'Patient Safety Acknowledgement (Warnings) popup', the below fields are displayed:
 - i. **<Message> Label:** The label is displayed as "The difference in the dose exceeds the present threshold. Are you sure you want to continue this order?"
 - ii. **'Medication Name' Label:** This label will display the name of the medication for which staff will be placing the order.
 - iii. **'Previous Dose' Label:** It will display the 'Previous order' value entered for that Client, Medication, and Strength in the format 'mg'. For example, the Previous Dose: 40 mg.
 - iv. **'Start Date of Previous Order' Label:** It will be the 'Start Date' of the Previous Order value entered for the Client and Medication and displayed in 'MM/DD/YYYY' format.
 - v. **'End Date of Previous Order' Label:** It will be the 'End Date' of the Previous Order value entered for the Client and Medication, and displayed in 'MM/DD/YYYY' format.
 - vi. **'Current Dose' Label:** It will be the Calculated 'Dose' value (same as what will be displayed in MAT management Detail) from the Current Client order and will be displayed in the format <xxx> mg. E.g., Current Dose: 60 mg.
 - vii. **'Change in Dose' Label:** This field defined with the difference between the 'Current dose' and the 'Previous dose' entered in the client order, will display in the format <xxx> mg. E.g., Change in Dose: 20 mg.
 - viii. **Continue:** Clicking on the 'Continue' button, will allow the user to sign the 'Client Order'.

If for any reason the user doesn't sign the 'Client Order' and later makes changes to the 'Client Order' and then on clicking the 'Sign' button, the warning popup will reappear during the signing process.

Client Order

Effective 05/28/2024 Status In Progress Author Admin, GK 05/28/2024

Order Entry Details

Entered By Admin, GK Order Mode Electronic Order Status Active
Ordering Physician Admin, GK ☐ Onsite Specimen Collection ☐ Read back and verified **Apply All**

Order **Order Set** **Preferences**

10Threshold Methadone 10-1 (Methadone) 3 ☐ Preference ☐ Discontin

Strength: 10mg/mL, Conc Dose: 40.00
Frequency: Once Priority: Emerg
Dispense Quantity: 30.00
Start: Other 06/03/2024 10:00 AM End: 06/07/2024
☐ May Self Administer ☐ May Use Own Supply ☐ Consent Required ☐ Dispense Brand
Rationale: Rationale 2 Max Quantity Allowed in 24 Hours:

Warnings

The difference in the dose exceeds the present threshold. Are you sure you want to continue this order?

Medication Name: 10Threshold Methadone 10-1
Previous Dose: 60 mg
Start Date of Previous Order: 05/28/2024
End Date of Previous Order: 06/02/2024

Continue **Cancel**

xi. **Cancel:** Clicking on the 'Cancel' button will navigate back to the 'Client Order screen'.

- a. If the user clicks on the 'Cancel' button without taking any action and then clicks on the 'Sign' button, the below warning message popup will appear again.

Client Order

Effective 05/28/2024 Status In Progress Author Admin, GK 05/28/2024

Order Entry Details

Entered By Admin, GK Order Mode Electronic Order Status Active
Ordering Physician Admin, GK ☐ Onsite Specimen Collection ☐ Read back and verified **Apply All**

Order **Order Set** **Preferences**

10Threshold Methadone 10-1 (Methadone) 3 ☐ Preference ☐ Discontin

Strength: 10mg/mL, Conc Dose: 40.00
Frequency: Once Priority: Emerg
Dispense Quantity: 30.00
Start: Other 06/03/2024 10:00 AM End: 06/07/2024
☐ May Self Administer ☐ May Use Own Supply ☐ Consent Required ☐ Dispense Brand
Rationale: Rationale 2 Max Quantity Allowed in 24 Hours:

Warnings

Medication Name: 10Threshold Methadone 10-1
Previous Dose: 60 mg
Start Date of Previous Order: 05/28/2024
End Date of Previous Order: 06/02/2024
Current Dose: 40 mg
Change in Dose: 20 mg

Continue **Cancel**

1. MAT Management Details screen:

In the 'MAT Management Details' screen, the 'Patient Safety Acknowledgement popup' will be displayed on each action of 'Dispense/Update' in the 'MAT Edit Dosage Popup' and 'MAT Re-Dispense Popup'.

- a. The 'Patient Safety Acknowledgement' Popup will be displayed only when the 'Dose threshold in mg' value is set in the 'Order Details' screen.

- b. When the quantity dispensed for the Client differs from the last amount dispensed and that difference exceeds a maximum threshold increase or decrease, the 'Patient Safety Acknowledgement' Popup will be displayed on clicking the 'dispense'.
- c. In the 'Patient Safety Acknowledgement popup', the following fields are displayed:
 - **<Message> Label:** The label is displayed as "The difference in the dose exceeds the present threshold. Are you sure you want to continue this dispense?"
 - **'Medication Name' Label:** It will display the 'Medication name' for which staff will do dispense.
 - **'Previous Dose' Label:** It will display the 'Previous Dose' value entered for that Client, Medication, and Strength in the format <xxx> mg. E.g., Previous Dose: 40 mg.
 - **'Date of Previous Order' Label:** It will be the 'Date' of the Previous dispensed for the Client and Medication and is displayed in 'MM/DD/YYYY' format.
 - **'Current Dose' Label:** It will be the 'Dose' entered in the 'Edit Dosage' pop-up/'MAT Re-Dispense' pop-up and is displayed in the format <xxx> mg. E.g., Current Dose: 60 mg.
 - **'Change in Dose' Label:** It will be the difference between the 'Current dose' and the 'Previous dose' entered in the 'Edit dosage' pop-up, displayed in the format <xxx> mg. E.g., Change in Dose: 20 mg.
 - **'Continue' Button:**
 - **MAT Dispense:** On clicking the 'Continue' button, the dose gets dispensed.

MAT Management Details

General

Client Name: Test Lakshmi, Kumar
 DOB: 10/01/1986
 SSN: 6780
 Next Appt Date:
 Primary Clinician: 4092, Test
 Date Signed: 05/30/2024
 SignedBy Name: Admin, GK

Dose : 40 mg

10Threshold Methadone
 10-1 10 mg/mL
 Lot #: 10thres 10

Dispense Information

Dispense Date: 06/03/2024 Order End Date:


Dispense History

No data to display

06/03/2024

T1

40 mg



06/05/2024, 40 mg
 06/06/2024, 40 mg

[Print Labels](#)

Patient Safety Acknowledgement popup

The difference in the dose exceeds the present threshold.
 Are you sure you want to continue this dispense?

Medication Name: 10Threshold Methadone 10-1
 Previous Dose: 60 mg
 Date of Previous Dose: 05/30/2024
 Current Dose: 40 mg
 Change in Dose: 20 mg

[Continue](#) [Cancel](#)

- **'MAT Edit Dosage' pop-up:** If the threshold is exceeded, then the 'MAT Edit Dosage' pop-up appears, and when the user clicks on the 'Continue' button, it allows the user to dispense it. If the user doesn't dispense, then the 'Patient Safety Acknowledgement popup' will appear over the 'MAT Edit Dosage' pop-up once again.

MAT Management Details

General

Next Appt Date:

Primary Clinician: 4092, Test

Date Signed: 05/30/2024

SignedBy Name: Admin, GK

Bottle #:

8901

Dispense Information

Dispense Date: 06/04/2024

Order End Date:

Dispense History

06/03/2024 06:30 PM, 40 mg, Dispensed, Admin, GK

06/04/2024
T1
40 mg

MAT Edit Dosage Popup

Patient Safety Acknowledgement popup

The difference in the dose exceeds the present threshold. Are you sure you want to continue this dispense?

Medication Name: 10Threshold Methadone 10-1
Previous Dose: 40 mg
Date of Previous Dose: 06/03/2024
Current Dose: 20 mg
Change in Dose: 20 mg

Continue

Cancel

Update

Close

- MAT Re-Dispense popup:** When the threshold is exceeded, the 'MAT Re-Dispense' popup will appear. Upon clicking the 'Continue' button, the dose will be dispensed.
- 'Cancel' Button:** If the user clicks the 'Cancel' button without taking any action and then proceeds to click 'dispense', the warning popup will reappear.
 - MAT Dispense:** Clicking on the 'Cancel' button will return to the dispense screen.
 - 'MAT Edit Dosage' pop-up:** By clicking on the 'Cancel' button, it will return to the 'MAT Edit Dosage' pop-up screen.
 - 'MAT Re-Dispense' pop-up:** By clicking on 'Cancel', it will return to the MAT Re-Dispense pop-up.

MAT Management Details

General

Next Appt Date:

Primary Clinician: Madhu, Clinical

Date Signed: 05/30/2024

SignedBy Name: Admin, GK

Bottle #:

8901

Dispense Information

Dispense Date: 05/31/2024

Order End Date:

Dispense History

05/30/2024 01:12 PM, 45 mg, Dispensed, Admin, GK

05/31/2024
45 mg

MAT ReDispense Popup

Patient Safety Acknowledgement popup

The difference in the dose exceeds the present threshold. Are you sure you want to continue this dispense?

Medication Name: 10Threshold Methadone 10-1
Previous Dose: 45 mg
Date of Previous Dose: 05/31/2024
Current Dose: 20 mg
Change in Dose: 25 mg

Continue

Cancel

Re-Dispense

Close

Note: In the 'Client Order Details' screen, and 'MAT Management Detail' screen, the below condition is applied:

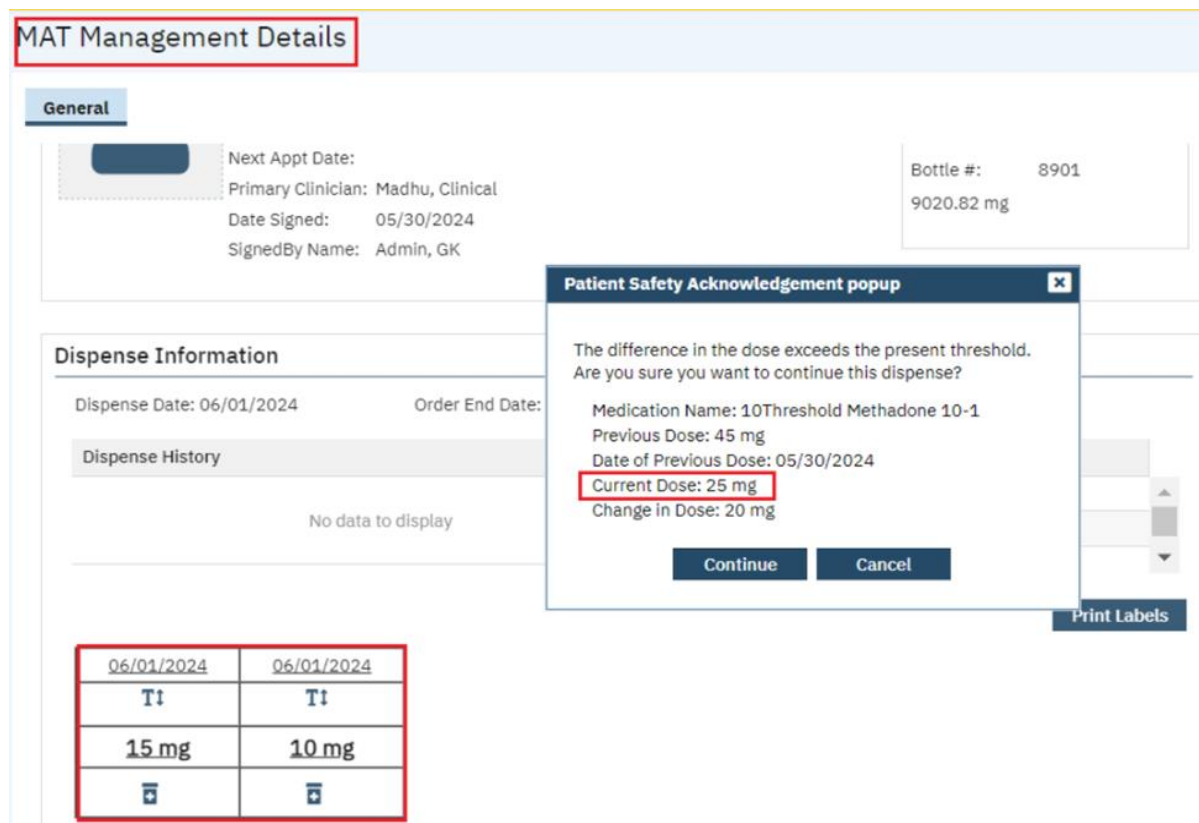
For split doses, the total difference between the previously dispensed dose and the most recent split (the sum of Split 1 and Split 2) for that day is considered, regardless of whether it is Split 1 or Split 2. **Please refer to the screenshot below.**

Eg:

Split 1 = 15 mg

Split 2 = 10 mg

Total Current Dose = 25 mg (Split 1 + Split 2).



The screenshot shows the 'MAT Management Details' screen. A 'Patient Safety Acknowledgement popup' is displayed over the 'Dispense Information' section. The popup contains the following text:

The difference in the dose exceeds the present threshold.
Are you sure you want to continue this dispense?

Medication Name: 10Threshold Methadone 10-1
Previous Dose: 45 mg
Date of Previous Dose: 05/30/2024
Current Dose: 25 mg
Change in Dose: 20 mg

Buttons: Continue, Cancel

The background screen shows the 'General' tab with fields for Next Appt Date, Primary Clinician (Madhu, Clinical), Date Signed (05/30/2024), Signed By Name (Admin, GK), and Bottle # (8901) with a total dose of 9020.82 mg. The 'Dispense Information' section shows Dispense Date (06/01/2024) and Order End Date. Below this is a 'Dispense History' table with the following data:

06/01/2024	06/01/2024
T↓	T↓
15 mg	10 mg

A 'Print Labels' button is visible at the bottom right of the screen.

Data Model Changes: A 'AcknowledgedSafetyDose' column is added in the Table 'MATManagementDetails'.

Author: Madhu Basavaraju

86. EII # 126835: New 'Medication Assisted Treatment' section in Order Details.

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

Navigation Path: 'Administration' -- 'Orders' -- 'Orders' list page -- New -- 'Order Details' screen -- Select 'Medication/Lab' Order Type -- 'Medication Assisted Treatment' Section -- Enter the required fields -- Save.

Functionality 'Before' and 'After' release:

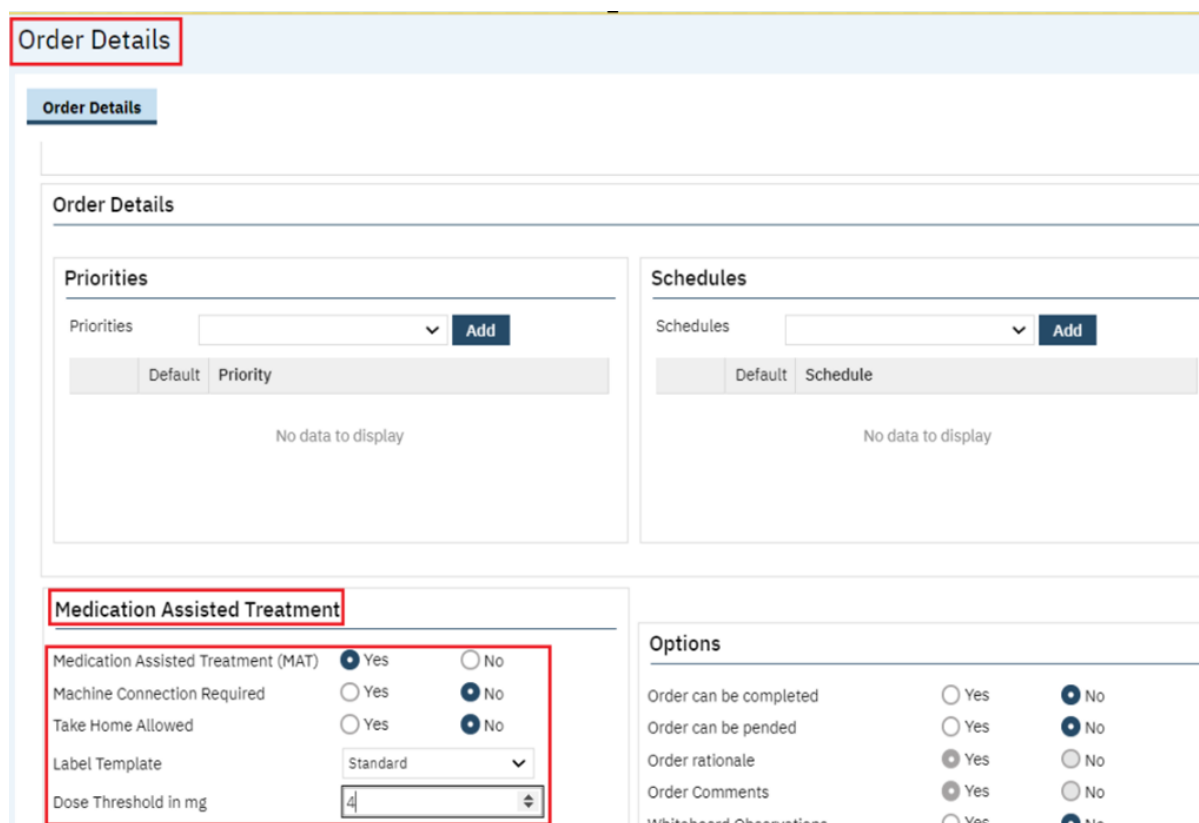
Purpose: To determine which orders are considered 'Toxicology Screen' orders and to create a better User setup experience for MAT customers.

With this release, the below implementation has been done.

A new 'Medication Assisted Treatment' section has been implemented in Order Details screen and will only display when 'Order Type' is 'Medication' or 'Lab'.

1. Order Type = 'Medication'.

- In the 'Order Details' screen, MAT-related radio button fields (mentioned below) are moved from 'Options' section to the new 'Medication Assisted Treatment' section by removing the Question Marks.

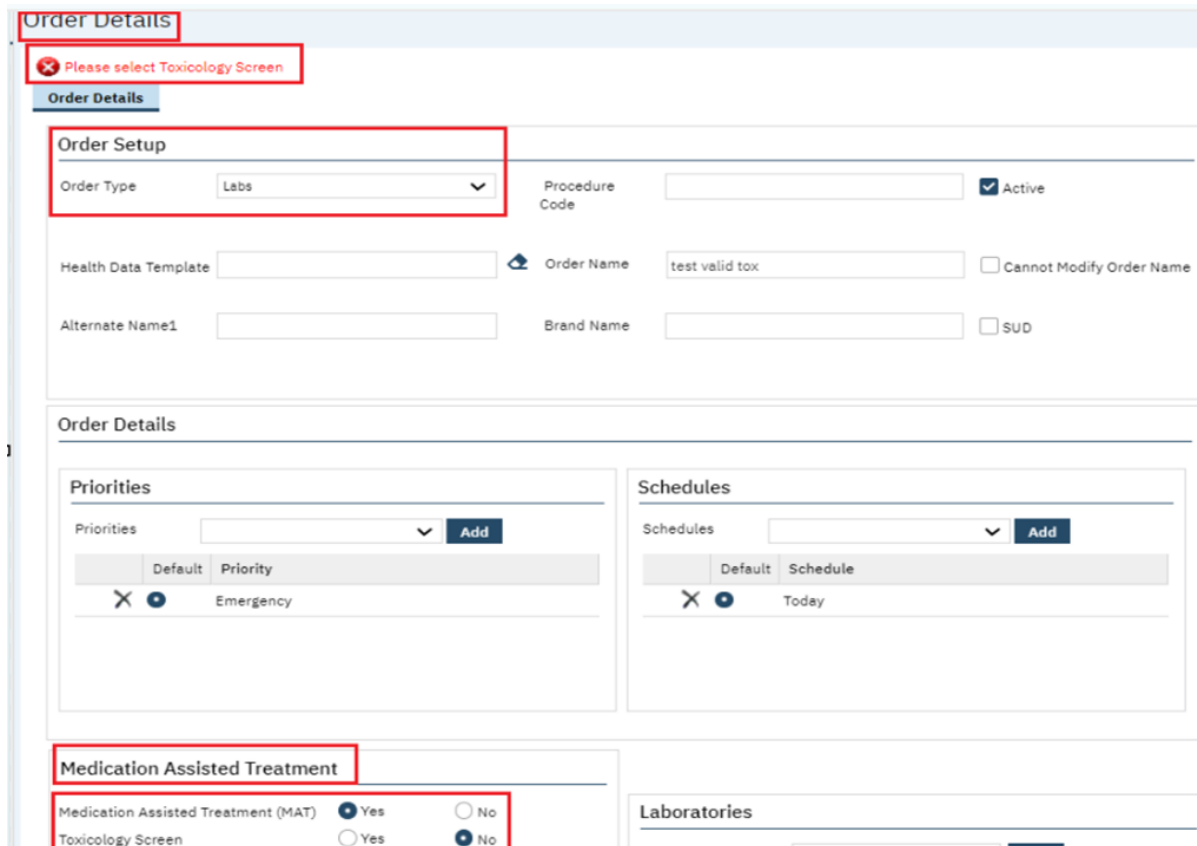


The screenshot shows the 'Order Details' screen. At the top, there is a tab labeled 'Order Details'. Below this, there are two main sections: 'Priorities' and 'Schedules'. Each section has a dropdown menu and an 'Add' button. Below these are two tables, both showing 'No data to display'. At the bottom, there is a section titled 'Medication Assisted Treatment' which is highlighted with a red box. This section contains several fields: 'Medication Assisted Treatment (MAT)' with 'Yes' and 'No' radio buttons (Yes is selected), 'Machine Connection Required' with 'Yes' and 'No' radio buttons (No is selected), 'Take Home Allowed' with 'Yes' and 'No' radio buttons (No is selected), 'Label Template' with a dropdown menu set to 'Standard', and 'Dose Threshold in mg' with a text input field containing '4'. To the right of this section is an 'Options' section with several fields and radio buttons, including 'Order can be completed', 'Order can be pended', 'Order rationale', 'Order Comments', and 'Whiteboard Observations'.

- When in Order setup Section Order Type is selected as 'Medication', under the 'Medication Assisted Treatment' section, the below mentioned fields will be displayed.
 - Medication Assisted Treatment (MAT):** 'Yes' and 'No' Radio button field.
 - Machine Connection required:** 'Yes' and 'No' Radio button field.
 - Take Home Allowed:** 'Yes' and 'No' Radio button field.
 - Label Template: Dropdown:** This will be displayed only when 'Medication Assisted Treatment (MAT)' selected as 'Yes'.
 - Dose Threshold in mg:** New 'Text Box' field.
 - If 'Medication Assisted Treatment (MAT)?' is chosen 'Yes', then this text box will be visible. Else, it will be hidden.
 - It allows only numeric values.
 - The Threshold amount is agency-specific and can vary by drug (Suboxone vs. Methadone).

2. Order Type = 'Lab'

When in Order setup Section Order Type is selected as 'Lab', under the 'Medication Assisted Treatment' section, the below mentioned fields will be displayed.



- **Medication Assisted Treatment (MAT):** 'Yes' and 'No' Radio button field.
- **'Toxicology Screen':** A new field with 'Yes' and 'No' Radio Button is displayed. This is defaulted to 'No' and is used to determine which Client Orders are considered 'Toxicology Screen' orders.
 - When Medication Assisted Treatment (MAT): 'Yes', then this will be a required field and need to select 'Yes'. Otherwise, a Validation message 'Please select Toxicology Screen' will be displayed.

Data Model Changes: Two new columns MATToxicologyScreen and MATThresholdDosage have been added to existing Table Orders.

Author: Madhu Basavaraju

87. EII # 127507: MAT Management Details: Modification to show last 4 of SSN and Dosing information more visible.

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

Prerequisite:

1. Create a MRT order by following the below **Path:**

'Administration' -- 'Orders' -- 'Orders' list page -- New -- 'Order Details' screen -- Select 'Medication' Order Type -- Enter the required fields -- Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes under 'Medication Assisted Treatment' section -- Save.

2. Add Medication Inventory Details by following the below **path**:

My Office -- 'Medication/Lot/Bottle' list page -- New -- 'Medication/Lot/Bottle Details' screen -- Enter the required fields -- Insert -- Save.

3. Machine connection Details through the below **path**:

My Office -- 'MAT Dispenser' list page -- New -- 'MAT DispenserDetail' screen -- 'General' tab -- Enter the required fields -- Insert -- Save -- Close -- 'MAT Dispenser' List page -- 'Machine Name' Hyperlink -- 'MAT Dispenser Detail' screen -- 'General' tab -- 'Machine Details' section.

4. Sign MAT Order by following the below **path**:

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

Navigation Path: 'My Office' -- 'MAT Management' list page -- Click on 'Dispense' icon for the 'Client' Medication to be dispensed -- 'MAT Management Details' screen.

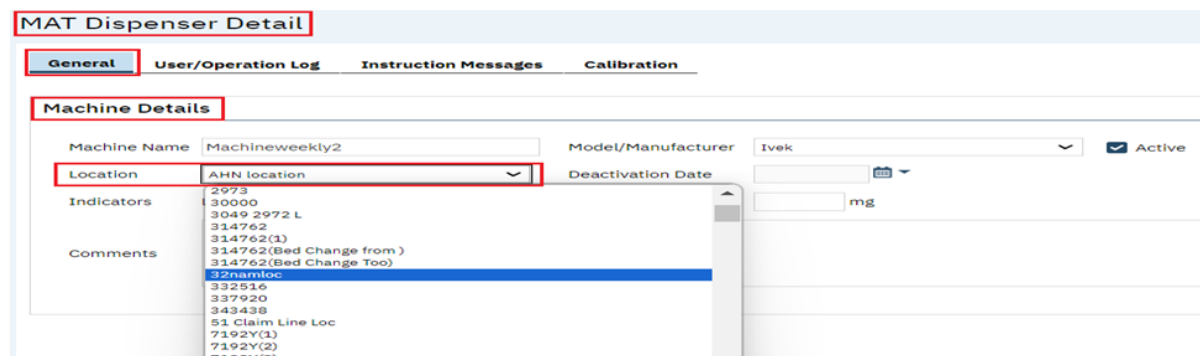
Functionality 'Before' and 'After' release:

Purpose:

- 1) To add SSN: Client identification verification process prior to dispensing.
- 2) Bolding Labels: User friendliness and dosing accuracy.
- 3) Location in the window/Dispenser setup -- option to edit this field in case of an error.

With this release, in MAT module, additional functionality has been implemented.

1. In the 'MAT Dispenser Detail' screen, 'Location' dropdown field has been enabled from being disabled, to Edit the Location.




2. In the 'MAT Management Details' screen, under the 'General' tab, the below mentioned field changes have been implemented.

MAT Management Details

General

Client Information



Client Name: Mat, Sonu

DOB: 01/20/1990

SSN: 3431

Next Appt Date:

Primary Clinician:

Dose : 35 mg

Methadone 5/5 threshold 5 mg/5 mL

Lot #: lot5ml

Bottle #: 5006

481.50 mg

Sign

Dispense Information

Dispense Date: 05/15/2024

Order End Date: 05/17/2024

Dispense History

No data to display

Scheduled

No data to display

Print Labels

05/15/2024	05/16/2024	05/17/2024
Ti	Ti	Ti
35 mg	35 mg	35 mg

a. In the 'Client Information' section:

- **Client Name:** Font Size has been increased with Bold.
- **DOB:** Font Size has been increased with Bold.
- **SSN:** Added a new label, to display the last 4 digits of the Client's SSN. SSN to be pulled from 'Client Information'. Font Size has been increased with Bold. If SSN is not found, then only the Label will be displayed.
- **Dose:** Font Size has been increased with Bold.
- **Medication Order name and Strength:** Font Size has been increased with Bold

b. Under 'Dispense Information' section:

- In the Grid,

- **Dose:** Font Size has been increased with Bold.

My Caseload

Reference No	Task No	Description
88	EII # 126915	R6 Issue- Caseload too large pop up

Author: Sunil Belagali

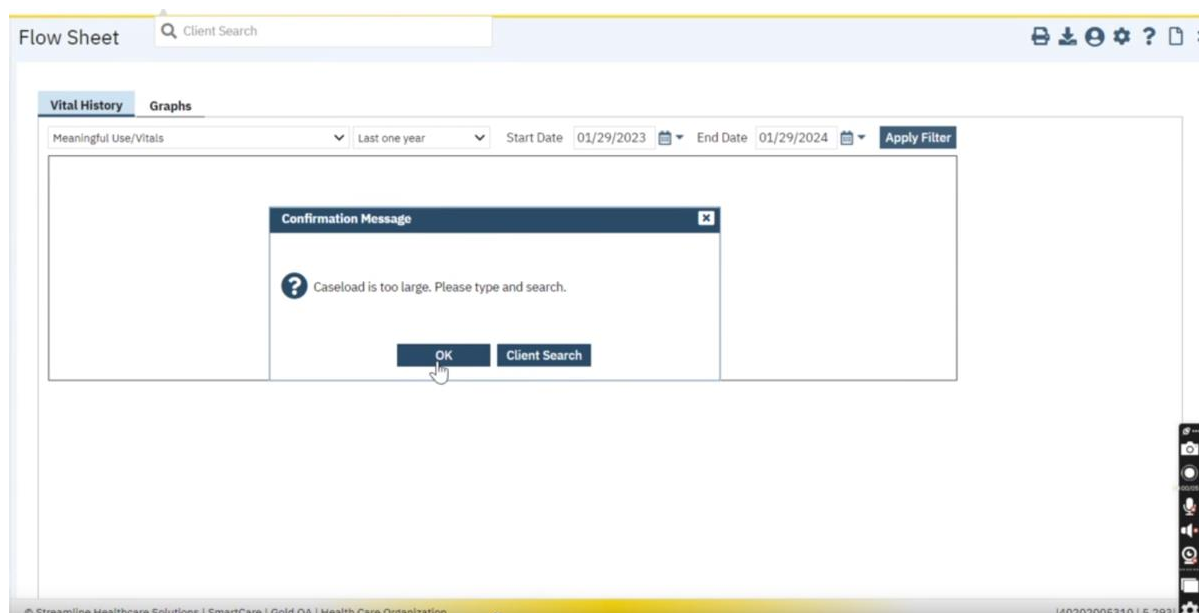
88. EII # 126915: R6 Issue- Caseload too large pop up.

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

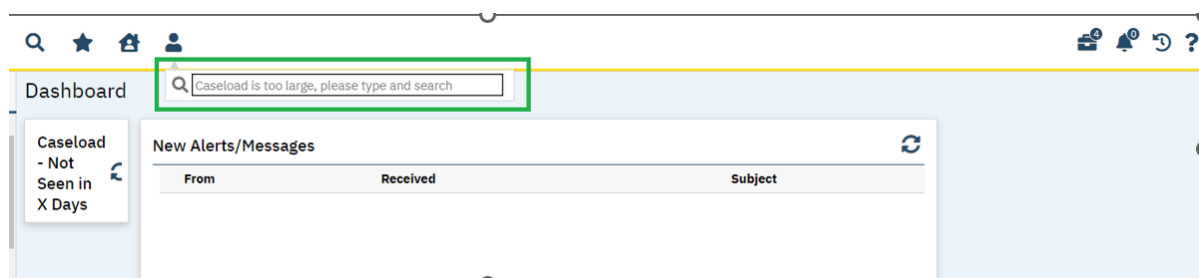
Navigation Path: 'Client search icon' -- 'Caseload'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When there are more than 1500 clients in Client Search Case load, for every client search, the user was getting a pop up that said "Caseload is too large. Please type and search." and was causing disruptions.



With this release, the above-mentioned issue has been resolved. Now, instead of a popup message. A flutter text "Caseload is too large, please type and search" will appear when there are more than 1500 clients are in the Client Search Case load.



My Documents

Reference No	Task No	Description
89	Core Bugs # 128069	Getting error messages when trying to open up the My Documents (My Office) page.

Author: Lavanya Gowdru

89. Core Bugs # 128069: Getting error messages when trying to open up the My Documents (My Office) page.

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

Navigation Path: 'Go Search' -- 'My Documents (My Office)'.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user tried to open My Documents (My Office), the below error message was displayed:

Error message: "Could not find stored procedure 'SSP_ParseConnectionString'. Invalid object name 'ImageServers'"

With this release, the above-mentioned issue has been resolved. Now, an error message is not displaying when the user opens My Documents (My Office) and My Documents list pages.

My Reports

Reference No	Task No	Description
90	Core Bugs # 127846	UDS Table 7 Health Outcomes and Disparities report Issue-- Section C for Document Diagnosis or Billing diagnosis any one signed count will take for the client logic changes.
91	Core Bugs # 127940	FQHC UDS Table 7 Report Issue-- Changes in the service status and duplicate count in unreported disclose race.
92	Core Bugs # 127807	FQHC UDS Table 4 - Uninsured Population.
93	Core Bugs # 128076	Exclude Test Clients from UDS Report.
94	Core Bugs # 127949	Reports: error displayed in the report was invisible(white).
95	EII # 126850	Implementation to create a report that can be used to generate 'Out of Network' Coverages mapped to Clients.
96	Core Bugs # 128064	'Month - End-AR Roll Over Summary' Report: Not filtering by what is selected in the report parameters.
97	EII # 126120	Changes are implemented to the Productivity Details Report.
98	Core Bugs # 127819	UDS Table 5 Staffing and Utilization Report: Clinical Visits(b) column is showing blank

Author: Boovendiran Chinnusamy

90. Core Bugs # 127846: UDS Table 7 Health Outcomes and Disparities report Issue-- Section C for Document Diagnosis or Billing diagnosis any one signed count will take for the client logic changes.

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

Navigation Path: 'My Office' -- 'UDS Table 7 Health Outcomes and Disparities' report.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. For the columns "Total Patients 18 through 75 Years of Age with Diabetes (3a)" and "Number of Records Reviewed (3b)", the values displayed as 1, if having both the diagnosis document and services under the 'Section C: Diabetes: Hemoglobin A1c Poor Control' report.

With this release, the above-mentioned issue has been resolved. Now, for the columns 'Total Patients 18 through 75 Years of Age with Diabetes (3a)' and 'Number of Records Reviewed (3b)', values are displayed as 1 if have either the diagnosis document or services under the 'Section C: Diabetes: Hemoglobin A1c Poor Control' of Report.

Author: Boovendiran Chinnusamy

91. Core Bugs # 127940: FQHC UDS Table 7 Report Issue-- Changes in the service status and duplicate count in unreported disclose race.

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

Navigation Path: 'My Office' -- 'UDS Table 7 Health Outcomes and Disparities' report.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'UDS Table 7 Health Outcomes and Disparities' report, in the Section B: Controlling High Blood Pressure' for Columns 'Total Patients 18 through 85 Years of Age with Hypertension (2a)' and 'Number of Records Reviewed (2b)' was displayed as below:

1. Diagnosis logic: 'Client had a diagnosis of essential hypertension starting before and continuing into the selected reporting year, or starting during the first six months of the measurement period'.

2. Unreported column- the count of client was displayed twice.

With this release, the above mentioned issue has been resolved. Now, 'UDS Table 7 Health Outcomes and Disparities' report, in 'Section B: Controlling High Blood Pressure' for Columns 'Total Patients 18 through 85 Years of Age with Hypertension (2a)' and 'Number of Records Reviewed (2b)' is displaying as below :

1. Diagnosis logic: If client has a Hypertension diagnosis in the Client Problems List where Start Date is $\leq 6/30$ of the reporting year AND the Client Problems End Date is $\geq 7/1$ of the reporting year. OR If client has the last signed Diagnosis Document where Document Effective date is $\leq 6/30$ and Hypertension is present on the Diagnosis Document. OR If client has the last Service where Date of Service is $\leq 6/30$ and Billing Diagnosis is Hypertension is present.

2. Unreported column the count of client is displaying correctly.

Author: Boovendiran Chinnusamy

92. Core Bugs # 127807: FQHC UDS Table 4 - Uninsured Population.

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

Navigation Path: 'My Office' -- 'UDS Table 4 Selected Patient Characteristics' report.

Functionality 'Before' and 'After' release:

Before this release, the following issues were observed.

1. Client Count was included in the report without considering the coverage plan that was active during reporting period of last service date.
2. Report included all clients on None/Uninsured even if patient had active coverage plans.
3. None/Uninsured, Total Medicaid, Medicare (Inclusive of dually eligible and other Title XVIII beneficiaries), Total Public Insurance, Private Insurance -for these fields, the total was calculated wrongly.

With this release, the above-mentioned issues have been fixed and are working fine.

1. Client count was included in the report considering the coverage plan that was active during reporting period of last service date.
 2. Report included all clients on None/Uninsured only if patient doesn't have active coverage plans.
 3. None/Uninsured, Total Medicaid, Medicare (Inclusive of dually eligible and other Title XVIII beneficiaries), Total Public Insurance, Private Insurance for these fields, the total is displaying correctly.
-

Author: Boovendiran Chinnusamy

93. Core Bugs # 128076: Exclude Test Clients from UDS Report.

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

Navigation Path 1: 'Administration' -- 'Recodes' -- 'Recodes' List page -- Select 'ExcludeTestClientsFromFQHCUDSReports' value in the 'All Recode Categories' dropdown field -- click on Apply 'Filter' -- Click on 'ExcludeTestClientsFromFQHCUDSReports' hyperlink -- 'Recode Detail' screen -- 'Enter required details' -- click on 'Insert' -- click on 'Save'.

Navigation Path 2: 'My Office' -- 'UDS Table 3A Patients by Age and Sex' report.

Navigation Path 3: 'My Office' -- 'UDS Table 3B Demographic Characteristics' report.

Navigation Path 4: 'My Office' -- 'UDS Table 4 Selected Patient Characteristics' report.

Navigation Path 5: 'My Office' -- 'UDS Table 5 Staffing and Utilization' report.

Navigation Path 6: 'My Office' -- 'UDS Table 6A Selected Diagnoses and Services Rendered' report.

Navigation Path 7: 'My Office' -- 'UDS Table 6b Quality of Care Measures' report - 'Detail report' of all sections.

Navigation Path 8: 'My Office -- 'UDS Table 7 Health Outcomes and Disparities' report.

Navigation Path 9: 'My Office -- 'UDS Table Patients by Zip Code' report.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The Test clients used for checking the reports cannot be excluded from the report.

With this release, a new ReCode Code category “ExcludeTestClientsFromFQHCUDSReports” is implemented, and the changes have been implemented in UDS reports to exclude the client.

“ExcludeTestClientsFromFQHCUDSReports” Recode: This Recode is used to set up the client id in Integer code id. Now in UDS Reports, those client Ids will not be displayed.

Recodes

Category

Category Code

ExcludeTestClientsFromFQHC

Category Name

ExcludeTestClientsFromFQHCUDSReport

Exclude Test Clients From FQHC UDS Reports

Mapping Entity

Clients.ClientId

Description

Recode Details

Code Name

Exclude client 1

Start Date

05/01/2024

End Date

05/08/2026

Character Code Id



Integer Code Id

6135

Modify

Clear

Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
 	Exclude client 1	05/01/2024	05/08/2026		6135

Author: Sunil Belagali

94. Core Bugs # 127949: Reports: error displayed in the report was invisible(white).

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

Navigation Path: Login – Reports – Date field – Enter the date in wrong format – click on View report.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Reports' screen, when a user entered the Date field in the wrong format and clicked on View Report, the error displayed on a report was invisible(white font) and would only be seen after highlighting.

With this release, the above-mentioned issue has been resolved. Now, when a user enters the Date field in the wrong format and clicks on View Report, the error displayed is visible and user can see the error without highlighting it.

Author: Shivakanth Moger

95. EII # 126850: Implementation to create a report that can be used to generate 'Out of Network' Coverages mapped to Clients.

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

Prerequisite: The client has a coverage plan associated with it and it is mapped into the Recodes (SetOutOfNetworkCoveragePlan). The Recodes are set up through the below mentioned **path:**

'Administration' -- 'Recodes' -- 'Recodes' List page -- Select 'SetOutOfNetworkCoveragePlan' value in the 'All Recode Categories' dropdown field -- click on 'Apply' Filter -- Click on 'SetOutOfNetworkCoveragePlan' hyperlink -- 'Recode Detail' screen -- 'enter required details' -- click on 'Insert' -- click on 'Save'.

Navigation Path 1: Login to 'SmartCare' -- 'Report for Out Of Network Coverages'(Client).

Navigation Path 2: Login to 'SmartCare' -- 'My Reports' -- Search for 'Report for Out Of Network Coverages' -- Click on 'Report for Out Of Network Coverages' name hyperlink.

Functionality 'Before' and 'After' release:

Purpose: To improve the performance and usability of identifying the Coverage Plans which are associated to the Client's record.

With this release, a new report named 'Report for Out Of Network Coverages' has been implemented with multiple filtering parameters. These filtering parameters will be used to pull the 'Out of Network' Coverage mapped to Clients.

This report will allow users to generate Coverages of Plans that are mapped on the recode category "SetOutOfNetworkCoveragePlan", i.e., for the selected plan(s) if there are Coverages within the selected date range, then they will be reported along with other information.

Client	Insured ID	Plan	Start Date	End Date
1020Test,1020Test (1328)	sdsd	second plan	10/01/2021	
1025Clienttest,1025Clienttest (1330)		Aetna	08/01/2021	08/31/2021
1092,Test1 (1167)	ATNA98767	Aetna	01/24/2021	01/24/2022
4359,Client1 (1201)	ATNA9876	Aetna	07/22/2021	07/25/2021
AAA (1312)	213123	Shiv5	07/01/2019	06/30/2020
AAA (1312)	213123	Shiv5	07/01/2020	07/01/2021
AAA (1312)	213123	Shiv5	07/03/2023	07/28/2023
AAA (1312)	213123	Shiv5	07/29/2023	09/15/2023
AAA (1312)	213123	Shiv5	09/16/2023	

Data Filtering Parameters:

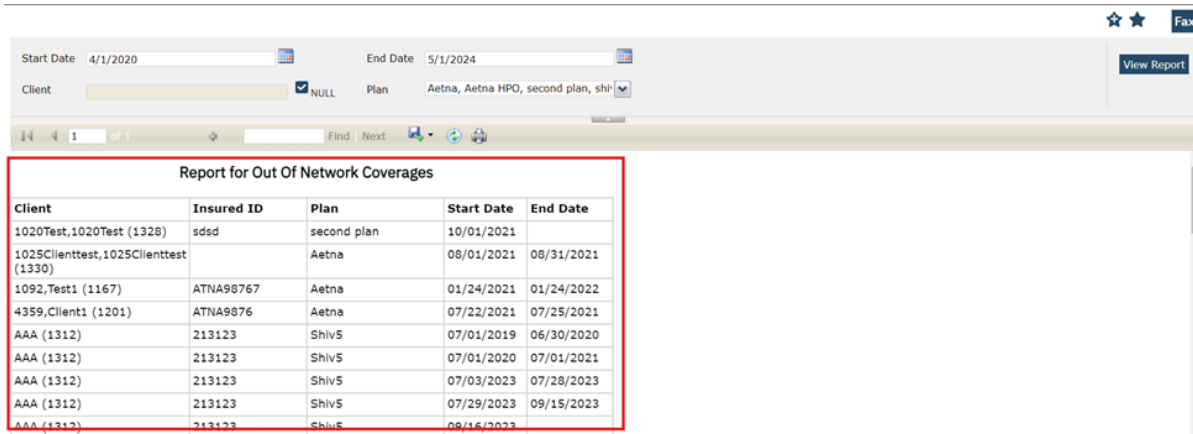
- 1. Start Date:** This is a Date control field, where user can select the date. This is Default to the previous month's start date and it is a required field.
- 2. End Date:** This is a Date control field, where user can select the date. This is Default to the current month's start date and it is a required field.
- 3. Client:** This is a text field and Client Name can be searched by Client ID. By default, the Client field is disabled.
- 4. NULL:** This is a checkbox and it is displayed next to the Client text field. By default, the checkbox is checked. On unchecking the checkbox, the Client field gets enabled and the users can search the Clients by entering the Name or ID.
- 5. Plan:** This is the multi-select drop-down and the values will be pulled from the Recode Category "SetOutOfNetworkCoveragePlan and it is a required field.
- 6. View Report:** This button is used to filter and pull the data.

The below details are extracted and displayed in this report:

Report Name: The report name will be displayed at the top of the report.

Grid header and details:

- 1. Client:** The column Displays the Client name in the format Last Name, First Name (Client ID)
- 2. Insured ID:** The column displays Client Coverage plans InsureID.
- 3. Plan:** The plan name will be displayed.
- 4. Start Date:** Displays the coverage plan Start Date.
- 5. End Date:** Displays the coverage plan End Date.



Start Date: 4/1/2020 End Date: 5/1/2024

Client: [] NULL Plan: Aetna, Aetna HPO, second plan, shi

View Report

1 of 1 Find Next

Client	Insured ID	Plan	Start Date	End Date
1020Test,1020Test (1328)	sdsd	second plan	10/01/2021	
1025Clienttest,1025Clienttest (1330)		Aetna	08/01/2021	08/31/2021
1092,Test1 (1167)	ATNA98767	Aetna	01/24/2021	01/24/2022
4359,Client1 (1201)	ATNA9876	Aetna	07/22/2021	07/25/2021
AAA (1312)	213123	Shiv5	07/01/2019	06/30/2020
AAA (1312)	213123	Shiv5	07/01/2020	07/01/2021
AAA (1312)	213123	Shiv5	07/03/2023	07/28/2023
AAA (1312)	213123	Shiv5	07/29/2023	09/15/2023
AAA (1312)	213123	Shiv5	08/16/2023	

Author: Namratha Nagaraj

96. Core Bugs # 128064: 'Month - End-AR Roll Over Summary' Report: Not filtering by what is selected in the report parameters.

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

Navigation Path: My Office' -- 'Month - End-AR Roll Over Summary' Report -- Enter the required detail -- Click on 'View Report'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user tried to filter using Summarize By field, it was not filtering with the selected parameters in the report.

With this release the above-mentioned issue is resolved. Now, when the user filters using the Summarize By field, it is filtering with the selected parameters in the report.

Author: Abhishek Naik

97. EII # 126120: Changes are implemented to the Productivity Details Report.

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

Navigation Path: 'My Office' -- 'Productivity Details Report'.

Purpose:

1. To view the performance of staff that are under specific Team supervisor(s) so that users can assess performance on a team supervisor basis.
2. The users will be able to filter by staff member name so that users can easily view each staff's performance at a time.
3. The users will be able to select multiple programs when filtering for teams so users can create a report of multiple teams in one go.

Functionality 'Before' and 'After' release:

With this release, the following filters have been implemented in the 'Productivity Details Report'. These filters help the user to filter the report for productivity reporting as the previous report was pulling all the staff's data which was taking much longer to load.

1. Team: This dropdown field is changed from single select to multiselect dropdown and all the active programs will be listed in the multi-dropdown.

2. Team Supervisor: This is a multi-select dropdown and all the active supervisors from Staff Supervisors will be listed in the dropdown. The Records for the selected supervisors will be displayed in the report.

3. Staff: This is a text field. The users will search by Last Name, First Name of the staff. The default value will be blank. The Records for the selected staff will be displayed.

Staff	Productivity Period	Team	Date	Bus. Days Remaining	IND Target for Period	IND Target to Date	IND Service Hours This Date	Total IND Hours Period to Date	IND % to Date	Hours Needed to Hit IND Target	Team Target to Date	Team Hours to Date	Team % to Date
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/7/2023	16	0.00	0.00	0.50	0.50	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/8/2023	15	0.00	0.00	0.00	0.50	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/9/2023	15	0.00	0.00	0.00	0.50	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/10/2023	15	0.00	0.00	0.00	0.50	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/11/2023	14	0.00	0.00	0.33	0.83	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/12/2023	13	0.00	0.00	0.33	1.16	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/13/2023	12	0.00	0.00	0.50	1.66	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/14/2023	11	0.00	0.00	0.50	2.16	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/15/2023	10	0.00	0.00	0.00	2.16	100.00%	0.00			
Yogendra, Kiran	12/07/2023 - 12/29/2023	TeamProgram	12/16/2023	10	0.00	0.00	0.00	2.16	100.00%	0.00			

Author: Ravindra Pitta

98. Core Bugs # 127819: UDS Table 5 Staffing and Utilization Report: Clinical Visits(b) column is showing blank.

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

Navigation Path: 'My Office' -- 'My Reports' -- 'UDS Table 5 Staffing and Utilization' Report.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the UDS Table 5 Staffing and Utilization Report, the Clinical Visits(b) column was shown as blank for the staff having multiple Major Service Categories.

With this release, the above-mentioned issue is fixed. Now, the UDS Table 5 Staffing and Utilization report displays correct values in Clinical Visits(b) column of the report for staff having multiple Major Service Categories.

Notifications

Reference No	Task No	Description
99	Core Bugs # 127878	Check-in notification popup is closing if there are no new check-in notifications.

Author: Niroop Hassan

99. Core Bugs # 127878: Check-in notification popup is closing if there are no new check-in notifications.

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

Prerequisite: Primary Care appointments are present for a client.

Navigation Path: 'My Office' -- 'Reception' -- 'Reception' list page -- Click on 'Schedule' hyperlink -- 'Change Status' popup -- Select 'Show' and click on 'Change' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Reception screen, when the status of the Service is changed from 'Scheduled' to 'Show', the check-in notification popup was getting closed. Based on 'ShowNotificationPollingInterval' configuration key value, the system needs to check for new check-in notifications. If there were no new check-in notifications, then all the open check-in notifications were closed.

With this release, the above-mentioned issue has been resolved. Now regardless of the value in 'ShowNotificationPollingInterval' configuration key, the check-in notification popup will stay on screen until the user closes it.

Patient Portal

Reference No	Task No	Description
100	Core Bugs # 128082	New User Role is Automatically Being Created.

Author: Abhishek Naik

100. Core Bugs # 128082: New User Role is Automatically Being Created.

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

Navigation Path 1: 'Administration' -- 'Role Definition' -- rename the 'Patient Portal User' role.

Navigation Path 2: 'Administration' -- 'Non-staff Users' -- 'Non-staff User' Details -- 'Roles/Permissions' tab.

Functionality 'Before' and 'After' release:

Before the release, here was the behaviour. When the 'Patient Portal User' role was renamed, an additional role was displayed in the 'Roles/Permission' tab of the 'Non-staff User Details' screen.

With this release, the above-mentioned issue has been resolved. Now, when the 'Patient Portal User' role is renamed, an additional role is not displayed in the Roles/Permission tab of the 'Non-staff User Details' screen.

Payments/Adjustments

Reference No	Task No	Description
101	Core Bugs # 127998	Payment Category (Unposted Payments - Deferred Revenue) - GL Debit/Credit is not Correct.
102	EII # 126353	To implement a validation in "Payment/Adjustment Posting" popup.

Author: Roopa Hemanna

101. Core Bugs # 127998: Payment Category (Unposted Payments - Deferred Revenue) - GL Debit/Credit is not Correct.

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

Prerequisites:

1. The System configuration key "GLTrackAndReportUnappliedPayments" is set to 'Yes'.
2. Create a Payment Category with Account String via Table Editor 'PaymentCategories' table.

Navigation Path 1: 'Administration' -- 'Table Editor' screen -- select 'Payment Categories' from the Table drop-down field -- click on the 'Execute' button -- enter 'Deferred Revenue' in the 'CategoryName' column -- enter data in the 'AccountString' -- click on 'Save' -- click on 'Execute' button.

Navigation Path 2: 'Administration' -- 'Payments/Adjustments' screen -- click on the hyperlink of 'Date Received' -- 'Payment/Adjustment Details' pop-up window -- apply 'Payment' -- select 'Deferred Revenue' from 'Payment Categories' dropdown field -- click on 'Update' button.

Navigation Path 3: 'My Office' -- 'GL Extract Detail Report' -- select 'Open Accounting Periods' -- click on the 'View Report' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The users were unable to see the 'Client Details' in the 'General Ledger Extract Detail' report due to the 'GL Details Report' not returning the 'ClientID' for the 'Deferred Revenue ledger type'.

With this release, the above-mentioned issue has been resolved. Now, the logic is modified for 'ssp_SCGLAccountExportData' to retrieve 'ClientID' for the 'Deferred Revenue ledger type'. Hence, the users can see the 'Client Details' in the 'General Ledger Extract Detail report'.

Author: Yashas Kydalappa

102. EII # 126353: To implement a validation in "Payment/Adjustment Posting" popup.

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

Prerequisite: The Global Code ID of the 'Check' type under PAYMENTMETHOD Global code category to be inserted in the 'Integer Code ID' text field of 'Recode Details' section under Recode Details screen.

Navigation Path 1: 'Administration' -- 'Recodes' -- 'Recodes' list page -- select 'SetPaymentMethodForDuplicateCheckValidation' under All recode categories drop down -- click on the recode category hyperlink -- Recode Details screen for 'SetpaymentMethodDupliateCheckValidation'.

Navigation path 2: 'My Office' -- 'All Services' -- 'Payments/Adjustments' -- 'Payments/Adjustments' list page - - click on 'New EOB/Payment/Adjustment' button -- 'Payment/Adjustment Posting' pop-up.

Functionality 'Before' and 'After' release:

Purpose: 'Currently there is no validation in the system when the Check number entered is already present in the system. This will cause confusion when two Charge records have same the Check Number for the Client Payments or Payer payments.'

With the release, the below mentioned changes have been implemented.

1. When a user tries to update the payment/adjustment posting pop-up with the duplicate check number, in 'Ref#' field for the 'Check' payment method under Payment Information section in Activity tab, the below validation message will be displayed.

Validation Message: Check Number already exists.

Payment/Adjustment Details

?

Check Number already exists

Payment/Adjustment Posting

Save As...UpdateDeleteClose

ActivityService Search

Activity

Date

05/27/2024

By

Yashas

Type

EOB/Payer Payment

ID

Amount

\$180.00

Comment

Acct. Period

May 2024

Payer

Payer

Medicaid

Plan

Payment Information

☐ Electronic

Pmt Method

Check

Ref #

B8HP7825

Location

CustomCredit

Source

Cash Receipt

Payment Category

Deferred Revenue

Applied

\$0.00

Balance

\$180.00

Ref/Adj

\$0.00

☐ Funds Not Received

Print Receipt

Maximize

2. The Validation for Duplicate check entries has been regulated under 'SetpaymentMethodDupliateCheckValidation' recode. If the 'Check' Type the payment method is mapped to this recode category, only then the validation will be displayed.
3. The existing records will be affected only when the recode start date is equal or prior date to the existing recode entry date.

Plans

Reference No	Task No	Description
103	EII # 125823	Plan Details: Update Workman's Comp to "Workers' Comp"

Author: Saravanakumaar Nagarajan

103. EII # 125823: Plan Details: Update Workman's Comp to "Workers' Comp".

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

Navigation Path: Go Search -- Plans (Administration) -- Plans screen -- Click on new icon -- Plan Details screen -- General tab -- General Information section -- “Workers’ Compensation” check box.

Functionality 'Before' and 'After' release:

With this release, Workman's Comp checkbox field name has been renamed to "Workers' Compensation" in Plan Details screen.

Primary Care

Reference No	Task No	Description
104	EII # 126676	Added code to set an end date to Client Problems if the complexity of problems matches with the Recode Categories "SetProblemEndDateFromComplexity".
105	EII # 126839	Implementing the default 'Clinic/Location' of the 'Lab Orders' in the 'Client Order' screen.

Author: Sithara Ponnath

104. EII # 126676: Added code to set an end date to Client Problems if the complexity of problems matches with the Recode Categories "SetProblemEndDateFromComplexity".

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

Prerequisites:

1. To Set the global Code.

Path: 'Administration' -- 'Global Codes' screen -- Select the category name 'EMCOMPLEXITYPROBLEM' from the 'All Categories' dropdown -- Click on Apply Filter button -- Select a problem Code Id and map that in the below recode category.

2. To Set the Recodes.

Path: 'Administration' -- 'Recodes' screen -- Select 'SetProblemEndDateFromComplexity' from the 'All Recode Categories' dropdown -- 'Integer Code Id' field -- Enter the 'Global Code Id' (Problem code Id from Global Codes Screen) -- 'Code Name' field -- Enter a numeric value (Number of days) -- Click on 'Insert' button -- Click on 'Save' button.

Navigation Path 1: 'Client' -- 'Medical Progress Note' screen -- Click on 'New' icon -- Select a template -- Click on 'Diagnosis' or 'Order Problem List' tag -- Search for the diagnosis -- Click on 'Insert' button -- Select a value from the 'Complexity of Problem' and other required data -- Click on 'Ok' button -- Click on 'Sign' button.

Navigation Path 2: 'Client' -- 'Client Problems' screen -- 'List of Client Problems' section -- Select the radio button of the problem -- 'End Date'.

Functionality 'Before' and 'After' release:

Purpose: The 'Problems that are acute and/or temporary need to be Ended and should not continue to display as Active for Client.

With this release, the below functionalities have been implemented.

1. A new recode category 'SetProblemEndDateFromComplexity' is created.

Screenshot of the recode:

Recode Detail

Recodes

Category

Category Code

SetProblemEndDateFromCom

Category Name

SetProblemEndDateFromComplexity

Mapping Entity

GlobalCodeId - EMCOMPLEXIT

Description

This recode is used to determine the EMCOMPLEXITYPROBLEM global code option(s) that will be used to auto-update Problem - End Date.

Use Recode Detail - Integer Code ID (also known as Global Code Details - Code Details - Code ID) to map.

Recode Details

Code Name

12

Start Date

04/19/2024

End Date

Character Code Id

Integer Code Id

11127555

Modify

Clear

Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
X	12	04/19/2024			11127555

- This recode is used to determine the EMCOMPLEXITYPROBLEM global code option(s) that will be used to auto-update Problem - End Date in Problem Detail screen.

- **Recode Details Section:**

o Integer Code ID: This is used to map the Code ID in Global Code Details screen.

o **Code Name:** This is used to define the Number of Days to generate End Date. Only numeric value will be accepted. If the 'Code Name' contains a value that is not numeric, then end date will not be updated.

If Global Code ID is included in Recodes, then the problem end date will be updated as - Start Date (Effective date of Medical Progress Note) + Number of Days (Numeric Value in Code Name field).

2. When the 'EMCOMPLEXITYPROBLEM' global code id (Integer Code Id) is added in the 'SetProblemEndDateFromComplexity' recode and, if there is a numeric value (Number of days) in the 'Recode Detail - Code Name' field, then the 'End Date' of the associated problem will be auto-updated upon signing the medical progress note.

Global Code Details [Settings] [Info] [AB] [Trash] [Print] [Save]

Category

Category Code: EMCOMPLEXITYPROBLEM Category Name: EMCOMPLEXITYPROBLEM ☒ Active ☐ User Defined Category

☒ Allowed to add/modify/delete codes
☒ Allowed to modify code names
☒ Allowed to modify sort order
☐ Has Subcodes

Description: Engineering Improvement Initiatives- NBL(I) #1100

Organization/Affiliate Setup

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

Code Details

Code ID: 11127555 Code Name: Self-Limited or Minor Problem ☒ Active ☒ Cannot Modify Name or Delete Code

External Code 1: External Source 1: Sort Order: 1 Code: SELF-LIMITI Color: [Color Picker]

External Code 2: External Source 2: Icon: Search or Select [Icon Picker]

Description: [Text Area]

[Add/Modify Subcodes...]

The below steps (Screenshots) show how the End Date is auto calculated based on the value provided in recodes.

- The Mapping of 'Global Code Id' in the Recode Details – 'Integer Code Id' and number of days entered in the 'Code Name' field.
- The Code ID from Global Code Details is mapped to Integer Code ID of Recode detail Screen.
- The Values entered 'Code Name' of recode Detail screen is then considered to calculate an End Date.

Recode Detail [Settings] [Info] [AB] [Trash] [Print] [Save]

Recodes

Category

Category Code: SetProblemEndDateFromCom Category Name: SetProblemEndDateFromComplexity

Mapping Entity: GlobalCodeId - EMCOMPLEXIT Description: This recode is used to determine the EMCOMPLEXITYPROBLEM global code option(s) that will be used to auto-update Problem - End Date.
Use Recode Detail - Integer Code ID (also known as Global Code Details - Code Details - Code ID) to map.

Recode Details

Code Name: 12

Start Date: 04/19/2024 End Date: [Calendar]

Character Code Id: Integer Code Id: 11127555

[Modify] [Clear]

Recode List

	Code Name	From Date	To Date	Character Code Id	Integer Code Id
X	12	04/19/2024			11127555

Problem List Pop-Up in the Medical Progress Note

The Code Name in Global Code Details screen will appear as Complexity Of Problem in Medical progress Note.

Select Problem

* DSM 5 code

	DSM 5/ ICD 10	SNOMED	ICD/DSM Description	SNOMED Description	D/C	Complexity of Problem	Injury Date	Injury Type	Diagnosis Order
X	F01.50	106021000119105	Vascular dementia, unspecified se...	Multi infarct dementia with athero...	<input type="checkbox"/>	Self-Limited or	06/01/2024	Auto comr	1

OK Cancel

Diagnosis List

	Order	DSM/ICD 10	SNOMED	R/O	ICD/DSM Description	SNOMED Description	Type	Severity	Source	Comments
i	1	F11.10	1451210001...		Opioid use disorder, Mild	Intravenous nondependent ...	Primary	Medium		
i	2	F43.10	1149252007		Posttraumatic stress disorder	Improvement in post-traum...	Additional			
i	3	F33.1	191611001		Major depressive disorder, R...	Recurrent major depressive ...	Additional			
i	4	F90.0	31177006		Attention-deficit/hyperactivi...	Attention deficit hyperactivit...	Additional			

Added 'Complexity of Problem' in the medical progress note.

Medical Progress Note

Effective: 06/03/2024 Status: In Progress Author: David, Miller 06/02/2024 Sign

Font Size B I U A- A+

General Exam

Assessment

Order Problem List

Ordered Problems

1 - Vascular dementia, unspecified severity, without behavioral disturbance, psychotic disturbance, mood disturbance, and anxiety : F01.50 : Injury Date - 06/01/2024 : Injury Type - Auto comment

Complexity of Problem - Self-Limited or Minor Problem

The client 'Problem Detail' screen with auto-updated end date for the associated problem.

The End Date will be auto updated in Problem Detail screen based on the Associated Problem.

Problem Detail

Problem Detail

Start Date: 06/03/2024 End Date: 06/15/2024 Injury Date: 06/01/2024 Injury Type: Auto comm... ☐ Terminal

Staff: David, Miller Type of Problem:

Most Common Problems:

Diagnosis: F01.50 Vascular dementia, unspecified severity, without behavioral disturbance, p... ☐ Include in Common List

Modify Clear

List Of Client Problems ☒ Show Active Problems Only

	Start Date	End Date	DSM 5/ ICD 10	SNOMED	ICD/DSM Descript	SNOMED Descript	Type Of Problem	Staff	Injury Date	Injury Type
X	08/28/20...	09/30/20...	F33.0	87512008	Major depressiv...	Mild major depr...	Major	Patil, Chaitali		
X	06/03/20...	06/15/20...	F01.50	1060210...	Vascular demen...	Multi infarct de...		David, Miller	06/01/2024	Auto com...

- Problem end date will be calculated as: - Start Date (Medical Progress Note Effective Date) plus number of days (numeric value) added in the recode detail - 'Code Name' field.

- The problem auto-updated end date will be visible in the 'Client Problems' section of the 'Problem Details' screen, once the user signs the Medical Progress Note.

Author: Sithara Ponnath

105. EII # 126839: Implementing the default 'Clinic/Location' of the 'Lab Orders' in the 'Client Order' screen.

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

Navigation Path 1: 'Administration' menu -- 'Staff/Users' screen -- Go to the 'Staff Preference' tab in the staff details screen -- Go to 'Clinic/Locations Defaults' section -- Select a lab from the 'Lab' dropdown and a location from the 'Clinic/Location' dropdown -- Click on 'Add' button -- Click on 'Save' button.

Navigation Path 2: 'Administration' menu -- 'Orders or Order Setup' screen -- Select the 'Lab' from the Order Type dropdown -- Go to 'Laboratories' section -- Select a 'Lab' from the 'Laboratories' dropdown -- Click on 'Add' button -- Go to 'Options' section -- Select value from the 'Clinic/Location(default)' from the dropdown -- Click on 'Save' button.

Navigation Path 3: 'Client' search -- 'Client Orders' screen -- Search and select a lab order.

Navigation Path 4: 'Client' search -- 'Client Orders' screen -- 'Order Set' tab -- Search and select a lab order set.

Functionality 'Before' and 'After' release:

Purpose: To set the default 'Clinic/Location' of the 'Lab Orders' in the 'Client Order' screen.

With this release, the below functionalities have been implemented.

- When 'Staff Details' and 'Order Details' are associated with the same lab, the Staff's 'Lab' and 'Clinic/Location' field Defaults will take priority over the 'Order Details screen's 'Lab' and 'Clinic/Location' field defaults.

Lab and Clinic/Location in the 'Staff Details' screen

Staff Details

General

Roles / Permissions

Client Access Overrides

Demographic/ Professional

Proc/ Prog/ Loc/ Proxy/ Supervisor

Productivity

Staff Preferences

Staff Search Preferences

Licenses / Degrees

Credentialing

Care Management

Contracted Rates

Time Sheet

Highly Qualified Teacher

Reporting

Other

Name

Subscribed for Push Notifications

No data to display

Clinic/Location Defaults

Lab

Clinic/Location

Add

Lab	Clinic/Location
X Quest	testShivJanRegression 2024

Notifications

List of staff who should also receive notifications

Add Staff...

Staff Name
No data to display

Treatment Team

Treatment Team Role

Staff Signature

Lab and Clinic/Location in the 'Order Details' screen:

Order Details

Order Details

Health Data Template

Lab Observation

Order Name

Lab Observation_Sithara

☐ Cannot Modify Order Name

Alternate Name1

Brand Name

Order Details

Priorities

Priorities

Add

	Default	Priority
X	<input checked="" type="radio"/>	Routine

Schedules

Schedules

Add

	Default	Schedule
X	<input checked="" type="radio"/>	Today
X	<input type="radio"/>	Other

Medication Assisted Treatment

Medication Assisted Treatment (MAT)

☐ Yes
☒ No

Toxicology Screen

☐ Yes
☒ No

Laboratories

Laboratories

Add

External Order Id

	Default	Laboratories	External Order Id
X	<input checked="" type="radio"/>	Quest	

Order Details

Order Details

Frequencies

Frequencies

	Default	Display Name	Frequencies	Dispense Times
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Once	Other	3:00PM

Diagnoses

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

Options

Order can be completed ☐ Yes ☒ No

Order can be pended ☐ Yes ☒ No

Order rationale ☐ Yes ☒ No

Order Comments ☐ Yes ☒ No

Whiteboard Observations ☐ Yes ☒ No

Diagnosis Required ☐ Yes ☒ No

Billable ☐ Yes ☒ No

Add Order to MAR ☐ Yes ☒ No

Prescription Required? ☐ Yes ☒ No

Permissioned? ☐ Yes ☒ No

Sensitive Order ☐ Yes ☒ No

Draw from Service Center ☐ Yes ☒ No

Quick Order ☐ Yes ☒ No

Medications category

Display Program? ☐ Yes ☒ No

Public Health Reportable ☐ Yes ☒ No

Clinic/Location(default) 3rd District Court

Default 'Lab and Clinic/Location' in the 'Client Orders' screen.

Client Order

Effective 06/03/2024 Status New Author Smith, Tester 06/03/2024

Order Entry Details

Entered By Smith, Tester Order Mode Electronic Order Status Active

Ordering Physician Smith, Tester ☐ Onsite Specimen Collection ☐ Read back and verified

Order Order Set Preferences Lab Observation_Sithara (Quest) ☐ Search Adhoc ALLERGIES

Lab Observation_Sithara (Quest) ☐ Preference ☐ Discontinued

Frequency: Once Priority: Routine Lab: Quest Clinic/Location: testShivJanReg

Start: Today End:

- If the staff does not have 'Lab' and 'Clinic/Location' Defaults, then the 'Lab' and 'Clinic/Location' field defaults from 'Order Details' will be displayed in the 'Client Orders' screen for the selected order.

Staff with no 'Lab Clinic/Location Defaults'.

Staff Details

General

Roles/ Permissions

Client Access Overrides

Demographic/ Professional

Proc/ Prog/ Loc/ Proxy/ Supervisor

Productivity

Staff Preferences

Staff Search Preferences

Licenses / Degrees

Credentialing

Care Management

Contracted Rates

Time Sheet

Highly Qualified Teacher

Reporting

Name

Subscribed For Push Notifications

No data to display

Clinic/Location Defaults

Lab

Clinic/Location

Add

Lab

Clinic/Location

No data to display

Default Financial Assignment

Notifications

List of staff who should also receive notifications

Add Staff...

Staff Name

No data to display

Treatment Team

Treatment Team Role

'Lab Clinic/Location Defaults' in the 'Order Details'

Order Details

Order Details

Health Data Template

Lab Observation

Order Name

Lab Observation_Sithara

Cannot Modify Order Name

Alternate Name1

Brand Name

Order Details

Priorities

Priorities

Add

Default

Priority

X

Routine

Schedules

Schedules

Add

Default

Schedule

X

Today

X

Other

Medication Assisted Treatment

Medication Assisted Treatment (MAT)

Yes

No

Toxicology Screen

Yes

No

Laboratories

Laboratories

Add

External Order Id

Default

Laboratories

External Order Id

X

Quest

Order Details

Order Details

Frequencies

Frequencies

	Default	Display Name	Frequencies	Dispense Times
<input checked="" type="radio"/>	<input checked="" type="radio"/>	Once	Other	3:00PM

Diagnoses

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

Options

Order can be completed ☐ Yes ☒ No

Order can be pended ☐ Yes ☒ No

Order rationale ☐ Yes ☒ No

Order Comments ☐ Yes ☒ No

Whiteboard Observations ☐ Yes ☒ No

Diagnosis Required ☐ Yes ☒ No

Billable ☐ Yes ☒ No

Add Order to MAR ☐ Yes ☒ No

Prescription Required? ☐ Yes ☒ No

Permissioned? ☐ Yes ☒ No

Sensitive Order ☐ Yes ☒ No

Draw from Service Center ☐ Yes ☒ No

Quick Order ☐ Yes ☒ No

Medications category

Display Program? ☐ Yes ☒ No

Public Health Reportable ☐ Yes ☒ No

Clinic/Location(default) 3rd District Court

Default 'Lab and Clinic/Location' in the 'Client Orders' screen.

Client Order

Effective 06/03/2024 Status New Author Smith, Tester 06/03/2024

Order Entry Details

Entered By Smith, Tester Order Mode Electronic Order Status Active

Ordering Physician Smith, Tester ☐ Onsite Specimen Collection ☐ Read back and verified

Order Order Set Preferences Lab Observation_Sithara (Quest) ☐ Search Adhoc ALLERGIES

Lab Observation_Sithara (Quest) ☐ Preference ☐ Discontinued

Frequency: Once Priority: Routine Lab: Quest Clinic/Location: 3rd District Cou

Start: Today End:

- If the staff doesn't have 'Lab' and 'Clinic/Location' field defaults and No 'Lab' and 'Clinic/Location' field defaults for 'Order Details' screen, then on the 'Client Order' or 'Order Set', the 'Lab' and 'Clinic/Location' fields will default to the first value in the drop-down.

When the 'Staff Details' and 'Order Details' have no 'Lab' and 'Clinic/Location' field defaults, the below is the 'Client Orders' screen of an 'Order' and the 'Lab' and 'Clinic/Location' field will be defaulted to the first value in the drop-down.

The screenshot shows the 'Client Order' interface. At the top, there's a header with 'Client Order' and navigation icons. Below it, a form contains fields for 'Effective' (06/03/2024), 'Status' (New), 'Author' (Smith, Tester), and another date (06/03/2024). The 'Order Entry Details' section includes 'Entered By' (Smith, Tester), 'Order Mode' (Electronic), 'Order Status' (Active), 'Ordering Physician' (Smith, Tester), and checkboxes for 'Onsite Specimen Collection' and 'Read back and verified'. An 'Apply All' button is present. Below this, the 'Order Set' section is active, showing 'Lab Observation_Sithara (Quest)' and a 'Search Adhoc' option. The 'Preferences' section includes 'Lab Observation_Sithara (Quest)', 'Frequency' (Once), 'Priority' (Routine), 'Lab' (Quest), 'Clinic/Location' (highlighted in yellow), 'Start' (Today), and 'End'.

When 'Staff Details' and 'Order Set Details' have no "Lab" and 'Clinic/Location' field defaults, the 'Labs' and 'Clinic/Location' fields of the 'Order Set' section of the 'Client Orders' screen will be defaulted to the first value in the drop-down.

This screenshot shows the 'Client Order' interface with the 'Order Set' section selected. It includes the same top header and 'Order Entry Details' section as the previous screenshot. The 'Order Set' section shows 'Sithara Test_Lab' and an 'ALLERGIES' link. The 'Labs' section is expanded, showing a list with 'questlab' and 'Lab Observation_Sithara' (checked). Below the list, 'Frequency' is 'Once', 'Priority' is 'Routine', 'Labs' (highlighted in yellow), and 'Clinic/Location' (highlighted in yellow). 'Start' is 'Today' and 'End' is empty.

- The user can add only one 'Lab' to the grid in the 'Order Details' screen. If the user tries to add multiple 'Labs', then the following validation message will be displayed:

Validation Message: "Only one Laboratory can be added."

Order Details

X Only one Laboratory can be added

Order Details

Medication Assisted Treatment (MAT) ☐ Yes ☒ No

Toxicology Screen ☐ Yes ☒ No

Frequencies

Frequencies

Add New

Laboratories

Laboratories LabCorp Add

External Order Id

	Default	Laboratories	External Order Id
X	<input checked="" type="radio"/>	Quest	

Options

- If there is a 'Lab' and 'Clinic/Location' fields associated with an 'Order Set Default', and then logged in Staff has a default 'Lab' and Clinic/Location' and uses the Order Set, then the 'Lab' and Clinic/Location' will be defaulted from the 'Staff' screen's.

Below is the 'Order Set Details' screen :


Order Set Details

Creating Order Set

Naming the Order Set

Name of Order Set


SitharaTest_OrderSet




☒ Active

Building Order Set



Select Order Type



Search Orders



Add

Type of Order	Order	Display Order		<input type="checkbox"/> Enable Defaults
 Labs	ordermanilab	1	Set Default	<input type="checkbox"/>
 Labs	TestLabOrder11 - ...	2	Set Default	<input checked="" type="checkbox"/>

The 'Lab' and 'Clinic/Location' fields defaults are added in the 'Order Set' by clicking on the 'Set Default' button.

Order Set Defaults

?

Save & Close

Order Set Defaults

TestLabOrder11 - V

Frequency: Daily - 9 PM

Priority: PRN

Lab: BE WELL CLINIC

Clinic/Location: Whitefield

Start: Today

Rationale: Rationale 5

The 'Lab' and 'Clinic/Location' field defaults are added in the 'Staff Details' screen.

Staff Details

General

Roles/ Permissions

Client Access Overrides

Demographic/ Professional

Proc/ Prog/ Loc/ Proxy/ Supervisor

Productivity

Staff Preferences

Staff Search Preferences

Licenses / Degrees

Credentialing

Care Management

Contracted Rates

Time Sheet

Highly Qualified Teacher

Reporting

Registered For Email Notifications

Send test Email Notification

Devices

Name

Subscribed For Push Notifications

No data to display

Clinic/Location Defaults

Lab

Clinic/Location

Add

Lab

Clinic/Location

BE WELL CLINIC

Alliance House

Financial

Default Financial Assignment

Notifications

List of staff who should also receive notifications

Add Staff...

Staff Name

No data to display

Treatment Team

The 'Lab' and 'Clinic/Location' will be defaulted with the 'Staff defaults' in the 'Order Set' tab of the 'Labs' section under the 'Client Order' Screen.

Streamline Healthcare Solutions, L.L.C. | 1301 W. 22nd St, Suite 305 | Oak Brook, IL 60523 | streamlinehealthcare.com

Client Order

Effective

Status New

Author Tester, Streamline

10/17/2023

Order Entry Details

Entered By Smith, Killer

Order Mode Electronic

Order Status Active

Ordering Physician Tester, Streamline

Onsite Specimen Collection

Read back and verified

Apply All

Order

Order Set

Preferences

SitharaTest_OrderSet

Select All

Labs

ordermanilab

TestLabOrder11 - V

Frequency: Daily - 9 PM

Priority: PRN

Labs: BE WELL CLIN

Clinic/Location: Alliance House

Start: Today

End:

Order List

Add Additional Orders

Titration Summary

Insert

Clear

Procedure/Rates

Reference No	Task No	Description
106	Core Bugs # 127529	Creating bundled services when program is not associated to the Procedure.

Author: Namratha Nagaraj

106. Core Bugs # 127529: Creating bundled services when program is not associated to the Procedure.

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

Prerequisites:

- Set System Configuration Key 'ConsiderProgramsAssociatedToProcedureCodeForBundledService' as Yes.
- Associate Bundle Codes to a Procedure to be bundled through the **path**:

Go Search -- Procedure/Rates (Administration) -- Select a Procedure (Procedure A) -- Bundle Codes tab -- Select a Procedure Code.

- Remove the program associated to Procedure (Procedure A).
- Execute nightly job (ssp_SCJobToCreateBundledServices)

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the system configuration key ConsiderProgramsAssociatedToProcedureCodeForBundledService is Yes and the Program associated to the Bundled Procedure Code was removed, the bundled service was created on executing ssp_SCJobToCreateBundledServices nightly job.

With this release, the above mentioned issue has been resolved. Now, when the system configuration key ConsiderProgramsAssociatedToProcedureCodeForBundledService is Yes and the Program associated to the Bundled Procedure Code is removed, the bundled service is not creating on executing ssp_SCJobToCreateBundledServices nightly job.

Programs

Reference No	Task No	Description
107	Core bugs # 127931	Program Assignment Details: When a user tried to enrol in the same program which is already in the discharged status then the system was throwing an incorrect validation message.
108	Core bugs # 128055	Programs: Client Programs Not Populating in the PAS 44 Admission Form.

Author: Shivakanth Moger

107. Core bugs # 127931: Program Assignment Details: When a user tried to enrol in the same program which is already in the discharged status then the system was throwing an incorrect validation message.

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

Prerequisite: A client program exists with a Discharged Status.

Navigation Path: 'Select a client' -- 'Program Assignment Details' -- 'Program Assignment'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user tried to enrol in the same program for a client, which was already in the discharged status, then the system was throwing below validation message.

Validation Message: Enrolled Date is overlapping with the existing Requested/Enrolled Date Range.

With this release, the above-mentioned issues have been resolved. Now, when the user enrolls in the same program for a client, which is already discharged, then the system is not throwing any validation message and allowing the user to enrol in the same program.

Author: Rajgopal Yajurvedi

108. Core Bugs # 128055: Programs: Client Programs Not Populating in the PAS 44 Admission Form.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before the release, here was the behaviour. The wrong sp (ssp_SCPostUpdateProgramAssignmentDetails) was placed in the PostUpdateStoredProcedure column of the screens table, which caused the failure in TEDS episode creation based on program enrolment.

With this release, the code optimization has been done to handle the above issue. The correct sp (ssp_PostUpdateProgramAssignmentDetail) is placed in the screens table's PostUpdateStoredProcedure column, and the TEDS episode is creating properly now on program enrolment.

Provider Contact

Reference No	Task No	Description
109	Core Bugs # 127884	Billing Code Rule Cap amount and claim charged amount limited to 7 characters.

Author: Renuka Gunasekaran

109. Core Bugs # 127884: Billing Code Rule Cap amount and claim charged amount limited to 7 characters.

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

Navigation Path1: 'My Office' -- 'Provider Contract' -- Select Provider -- 'Provider contract' -- 'Contract Details' -- 'Amount Cap'.

Navigation Path 2: 'Client' -- 'Claim Lines' -- Select Claim type 'P/I/PP/PI' -- 'Claim Entry Screen' -- 'Service Lines' section -- 'Charge' field.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Amount Cap' field in Provider Contract details screen and the 'Charge' field in Claim Entry screen, allowed user to enter up to only 7 characters.

After this release, the above-mentioned issue is resolved and now both the field length increased to 12 characters and is working fine.

Quick Links

Reference No	Task No	Description
110	Core Bugs # 127907	Ordering of the Quick links not changing.

Author: Rakesh Naganagoda

110. Core Bugs # 127907: Ordering of the Quick links not changing.

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

Navigation Path: Login to 'SmartCare' -- 'Administration' -- 'Quick Links' screen -- 'Select any Quick Link and change the default order'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. After changing the default order value of the Quick Link, it is not moving to the correct order place in the Quick Link.

With this release, the above-mentioned issues have been resolved. Now the Quick Links are displaying according to the default order value given.

Reception

Reference No	Task No	Description
111	Core Bugs # 128051	Additional/duplicate check-in notifications on primary care appointments.

Author: Niroop Hassan

111. Core Bugs # 128051: Additional/duplicate check-in notifications on primary care appointments.

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

Prerequisite: Primary Care appointments should be present for a client.

Navigation Path 1: 'My Office' -- 'Reception/Front Desk' -- 'Reception/Front Desk' list page -- Click on 'Create Primary Care Visit' icon -- 'New primary Care Entry' popup -- Enter required fields and click on 'OK' button.

Navigation Path 2: 'My Office' -- 'Reception' -- 'Reception' list page -- Click on 'Schedule' hyperlink of Primary Care appointment -- 'Change Status' popup -- Select 'Check-In' and click on 'Change' button.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user changed the status of Primary Care appointments from 'Schedule' to 'Check-In', the clinician was getting multiple check-in notifications.

With this release, the above-mentioned issue has been resolved and now, the clinician is getting a single notification when the status of Primary Care appointments from 'Schedule' to 'Check-In'.

Rx Application

Reference No	Task No	Description
112	Core Bugs # 127893	Prescribed medications were not displayed in the View Medication History page.
113	Core Bugs # 127881	User logged out of the application on selecting drug from dropdown.
114	Core Bugs # 127863	RX: Medication Management Slowness.
115	Core Bugs # 126920	Queued Order multiple click on Approve Order - TFA Issue.
116	Core Bugs # 128041	The Outbound Prescription tab in SmartCare RX is not displaying any data.
117	Core Bugs # 128144	RX: Prescriber Credentials are missing on Refills/Reorder Medications.
118	EII # 125633	RX- Disable Prescribe Button.
119	EII # 128015	Remove NADEA validation in the prescription screens.
120	EII # 126318	Implementation to send the 'State License' IN Request XML which is required to stay on compliance with the state PMP Process.

Author: Rajgopal Yajurvedi

112. Core Bugs # 127893: Prescribed medications were not displayed in the View Medication History page.

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

Prerequisite: Medication is to be prescribed via below **path:**

Login to SmartCare Application -- 'Client' -- 'Medication Management Rx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Fill all required fields -- click on 'Insert' button -- click on 'Prescribed' button -- 'Patient Summary' page.

Navigation Path: Login to SmartCare Application -- My Office -- 'Medication Management (Rx)' link-- Rx Application -- 'Patient Summary' screen -- 'Medication History' button -- 'View Medication History' Page --check for Prescribed Medication.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked the 'Medication History' button and navigated to the 'View Medication History' page, then prescribed medications were not displayed.

With this release, the above-mentioned issue is resolved. Now, the prescribed medications are displayed in the 'View Medication History' page.

Author: Rajgopal Yajurvedi

113. Core Bugs # 127881: User logged out of the application on selecting drug from dropdown.

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

Navigation Path: Login to SmartCare Application -- 'Client' -- 'Medication Management Rx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Select the drug dropdown -- Select the other medication.

Functionality 'Before' and 'After' release:

Before this release, here was_ the behaviour. In the New Medication Order page, when the user searched and selected the medication, and after that, clicked on the Drug dropdown and selected the available other medication from Select Drug pop up, then the user was logged out of Rx Application.

With this release, the above-mentioned issue has been resolved. Now the user is not logged out of Rx Application when the user selects the available other medication in the drug dropdown.

Author: Rajgopal Yajurvedi

114. Core Bugs # 127863: RX: Medication Management Slowness.

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

Navigation Path: 'Client' -- 'Medication Management Rx' -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Formulary Tab -- Medication related information displayed.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the 'New Medication Order' page, when the user selected the medication, then in the Formulary tab, the application was taking more time to load information. The application's performance was slow due to Formulary API.

With this release, the above-mentioned issue has been resolved. Now, the timeout logic is added so that Formulary responds quickly and Formulary API is binding the information and there is no performance issue in loading the information.

Author: Manjunath Malipatil

115. Core Bugs # 126920: Queued Order multiple click on Approve Order - TFA Issue

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

Prerequisite: Multiple Queued Orders with Different Prescription method through the below **Path:**

Login to 'SmartCare Application' -- 'Select a client' -- 'Medication Management (Client)' -- 'Patient Summary Screen (Rx Application)' -- Click on 'New Order' Button -- Select a 'Medication'-- Enter all the required fields -- Click on 'Insert' Button -- Click on 'Queued Order' Button.

Navigation Path: Login to 'Rx' Application -- 'Start page' -- Click on the 'Queued Order' Button -- In the 'Order Approval' Screen -- Click on the 'Approve' button Multiple Times.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user clicked on the 'Approve' button continuously, a medication with an electronic method was approved by bypassing the Two Factor Authentication.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on the 'Approve' button multiple times, a medication with an electronic method is not approved.

Author: Rajgopal Yajurvedi

116. Core Bugs # 128041: The Outbound Prescription tab in SmartCare Rx is not displaying any data.

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

Prerequisite: Medication is Prescribed through the below **path**:

Login to SmartCare application -- 'Client' -- 'Medication ManagementRx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Fill all required fields -- click on 'Insert' button -- click on 'Prescribe' button -- Prescribe Page -- click on 'Prescribe' button -- 'Patient Summary' page.

Navigation Path: Login to SmartCare application -- My Office -- 'Medication Management' link -- Rx Application -- 'Start Page' screen -- 'Outbound Prescriptions' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Rx application, in the Start Page, under the 'Outbound Prescriptions' tab, the records / prescriptions were not displayed.

With this release, the above mentioned issue has been fixed. Now, records/prescriptions are displayed under the 'Outbound Prescriptions' tab in the Start Page.

Author: Rajgopal Yajurvedi

117. Core Bugs # 128144: RX: Prescriber Credentials are missing on Refills/Reorder Medications.

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

Prerequisites:

1. Staff/Prescriber is having a degree and the degree is setup via below **path**:

Login to SmartCare Application -- Administration -- Staff/User -- Staff Details page -- License/Degree--Select degree -- Select the 'Billing' check box -- Insert the degree -- Save.

2. Medication prescribed via below **path**:

Login to SmartCare Application -- 'Client' -- 'Medication Management Rx' -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- Prescriber displayed with degree -- Select the drug with starting three letters -- Fill all required fields -- Select the EPCS Pharmacy -- click on 'Insert' button -- click on 'Prescribe' button -- 'Patient Summary' page.

Navigation Path 1: Login to SmartCare Application --Administration -- Staff/User -- Staff Details page -- License/Degree -- Select degree -- Select the 'Billing' check box -- Insert/Modify the degree -- Save.

Navigation Path 2: Login to SmartCare Application -- 'Client' -- 'Medication Management Rx' -- Rx application - - Patient Summary -- Select the check box for drug in the active medication list -- Click on 'Re-order' button -- 'Re-Order Medication Order' page -- click on 'Prescribe' button -- Select the 'Ready to Sign' check box -- Prescribe button.

Functionality 'Before' and 'After' release:

Before this release, here was behaviour. In the SmartCare application, the prescriber was having degree with 'Billing' checkbox selected and saved. When the prescriber re-ordered the medication in the Rx Application, then the prescriber name was not displayed with degree in the Patient Summary page.

With this release, the above mentioned issue has been resolved. Now, when the prescriber is having a degree with 'Billing' checkbox selected and saved, on reordering the medication, the prescriber name is displayed with degree in the Patient Summary page.

Note: When the prescriber is not having degree or having degree with 'Billing' checkbox unselected, then on reordering the medication, the prescriber is not displayed with degree in the Patient Summary page.

Author: Rajgopal Yajurvedi

118. EII # 125633: Rx- Disable Prescribe Button

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

Prerequisites:

1. SmartCare – In the Role Definition page, the Prescribe permission is denied under RX permission via **path**:

Login to SmartCare Application -- Administration -- Role Section -- Select Role -- Default Permissions for Selected Role section -- Select 'Rx Permission' -- Click Apply Filter -- 'Prescribe' permission -- Click Deny button -- Save.

2. Rx Application: In the User Preference page, prescribe permission is removed is from Permission section via below **path**:

Login to SmartCare Application -- Administration -- 'Medication Management' link -- Rx Application - - Start Page -- click My Preference button -- User Preference page -- Permission section -- click 'X' button for 'Prescribe' permission -- Save.

Navigation Path: Login to SmartCare Application -- 'Client' -- 'Medication Management Rx' link -- Rx Application -- 'Patient Summary' screen -- New Order button -- New Medication Order Page -- 'Prescribe' button disabled.

Functionality 'Before' and 'After' release:

Purpose: In Rx Permissions, need the ability to deny permission for few staff for the 'Prescribe' button.

Before this release, here was behavior.

In Rx application. in the New Order Medication, Re Order Medication, Change Order Medication and Complete Order Medication pages, the Prescribe button was not disabled and the user did not had any kind of Permission to disable the Prescribe button.

With this release, the user can disable the Prescribe button in New Order Medication, Re Order Medication, Change Order Medication and Complete Order Medication pages.

Now,

- In Rx Permissions, the users have the ability to deny permission for the 'Prescribe' button.
- By default, if any role that currently has 'New Order' permission is granted, then prescribe permission should be granted so as not to remove any existing permissions.
- In the Smart Care, under Role Definition page, the Prescribe Permission is added to 'Rx Permission' list.

Role Definition				Save	X
Rx	Drug Formulary	Deny	Granted		
Rx	Edit Preferred Pharmacy	Deny	Granted		
Rx	Eligibility	Deny	Granted		
Rx	Formulary	Deny	Granted		
Rx	Medication History	Deny	Granted		
Rx	MedOrderTemplate	Deny	Granted		
Rx	New Order	Deny	Granted		
Rx	Patient Consent	Deny	Granted		
Rx	Permit Changes	Deny	Granted		
Rx	PMP	Deny	Granted		
Rx	Prescribe	Deny	Granted		
Rx	Print List	Deny	Granted		
Rx	Queue Order	Deny	Granted		
Rx	Real-Time Med History	Deny	Granted		
Rx	Reconciliation	Deny	Granted		
Rx	Refresh Shared Tables	Deny	Granted		
Rx	Re-Order	Deny	Granted		
Rx	View History	Deny	Granted		

- In the Smart Care, under Role Definition page, by default 'Prescribe' Permission is granted to existing and new staff for assigned role. And the user can 'Deny' the permission manually.

Role Definition			
Hx	Drug formulary	Deny	Granted
Rx	Edit Preferred Pharmacy	Deny	Granted
Rx	Eligibility	Deny	Granted
Rx	Formulary	Deny	Granted
Rx	Medication History	Deny	Granted
Rx	MedOrder/Template	Deny	Granted
Rx	New Order	Deny	Granted
Rx	Patient Consent	Deny	Granted
Rx	Permit Changes	Deny	Granted
Rx	PMP	Deny	Granted
Rx	Prescribe	Denied	Grant
Rx	Print List	Deny	Granted
Rx	Queue Order	Deny	Granted
Rx	Real-Time Med History	Deny	Granted
Rx	Reconciliation	Deny	Granted
Rx	Refresh Shared Tables	Deny	Granted
Rx	Re-Order	Deny	Granted
Rx	View History	Deny	Granted

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In the Rx Application, in the User Preference page under Permission section, the 'Prescribe' Permission is added to existing and new staff, by default. And the prescriber can remove the permission manually.

General <input checked="" type="checkbox"/> Active <input type="checkbox"/> Prescriber First Name: Rajgopal Last Name: Yajurvedi Phone Number: 8908901234 Fax Number: (897) 665-6552 Email: raj@ved.com.com User Name: rajgopal Address: 44 western side post il. 70909 Date Created: 08/12/2022 Last Visit: 06/04/2024 01:03 PM	Professional Degree: Technical Personnel Signing Suffix: OTHER Organization License #: IL31237892 DEA Number: MM3635712 NPI: 7019624202 NA DEA: Locations <input type="checkbox"/> 01 & 02 Austria Bangalore <input type="checkbox"/> 1425 Starr Ave <input type="checkbox"/> 3rd District Court	SureScripts Active Start Time: 08/12/2007 12:00 AM Active End Time: 08/23/2042 12:00 AM Service Level: NewRx + Refill + EPC1 Prescriber Id (SPI): 7314928162001 SureScripts will be updated when the staff record is updated										
Account Password: ***** Confirm Password: ***** Expires: <input type="checkbox"/> Password Expires Next Login Never	Preferences Medication Days Default: 0 Default Prescribing Quantity:	EPSC Device Registration <input checked="" type="radio"/> Soft Token <input type="radio"/> OTP Token <input type="radio"/> None Device Name: M2012K11AI Device Serial #: 367152 Device Username: pbodhu0506 Device Password: One Time Password (OTP): Soft Token User Name: Authenticated: Yes ✓ Set Default Device										
Permissions <table><tr><td><input checked="" type="checkbox"/> Medication Management</td><td>DiscontinueFax</td></tr><tr><td><input checked="" type="checkbox"/> Medication Management</td><td>EPSC</td></tr><tr><td><input checked="" type="checkbox"/> Medication Management</td><td>Real-Time Med History</td></tr><tr><td><input checked="" type="checkbox"/> Medication Management</td><td>Prescribe</td></tr><tr><td><input checked="" type="checkbox"/> Medication Management</td><td>Change</td></tr></table> Add Permissions...			<input checked="" type="checkbox"/> Medication Management	DiscontinueFax	<input checked="" type="checkbox"/> Medication Management	EPSC	<input checked="" type="checkbox"/> Medication Management	Real-Time Med History	<input checked="" type="checkbox"/> Medication Management	Prescribe	<input checked="" type="checkbox"/> Medication Management	Change
<input checked="" type="checkbox"/> Medication Management	DiscontinueFax											
<input checked="" type="checkbox"/> Medication Management	EPSC											
<input checked="" type="checkbox"/> Medication Management	Real-Time Med History											
<input checked="" type="checkbox"/> Medication Management	Prescribe											
<input checked="" type="checkbox"/> Medication Management	Change											

General
☒ Active
 ☐ Prescriber

First Name
 Last Name
 Phone Number
 Fax Number
 Email
 User Name
 Address
 Date Created
 Last Visit

Account
 Password
 Confirm Password
 Expires ☐ Password Expires Next Login
☒ Never

Professional
 Degree
 Signing Suffix
 License #
 DEA Number
 NPI
 NA DEA

SureScripts
 Active Start Time
 Active End Time
 Service Level
 Prescriber Id (SPI)
 SureScripts will be updated when the staff record is updated

Locations
 Location Name
☐ 01 & 02 Austria Bangla
☐ 1425 Starr Ave
☐ 3rd District Court

Preferences
 Medication Days Default
 Default Prescribing Quantity

Permissions

☒ Medication Management
☒ Medication Management
☒ Medication Management
☒ Medication Management
☒ Medication Management
☒ Medication Management

PMP
 Discontinue Non Order Medication
 Discontinue Order Medication
 Discontinuefax
 EPCS
 Real-Time Med History

Add Permissions...

Add Permissions

Available

☐ Medication Management
 Prescribe

☒ Soft Token
 ☐ OTP Token
 ☐ None
 Device Name
 Device Serial #
 Device Username
 Device Password
 One Time Password (OTP)
 Soft Token User Name

☐ Default
 ☐ ScriptPrinter
 ☐ Chart Copy Printer

☐
☐
☐

- When the Configuration Key "TurnOnRoleBasedRxPermissionsInSmartCare" is set as "Yes" and the permission "Prescribe" in SmartCare will be in sync with the permission item for "Prescribe" button in Rx Application.
- When the Configuration Key "TurnOnRoleBasedRxPermissionsInSmartCare" is set as "No", then in the role definition screen, Rx permission item will not be displayed in permission dropdown, but still user can add or remove Prescribe permission item for "Prescribe" button in Rx Application.
- Prescribe button will be Enabled / Disabled in New Medication/ Re Order/Change Order/ Complete Order based on Prescribe Permission Added / Removed in Rx Application respectively and not dependent on Prescribe Permission Granted / Denied in SmartCare as mentioned in the below table.

Permissions in SC	Permissions in Rx	Prescribe button
Granted	Granted	Enabled
Denied	Denied	Disabled
Granted	Denied	Disabled
Denied	Granted	Enabled

Author: Rajgopal Yajurvedi

119. EII # 128015: Remove NADEA validation in the prescription screens.

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

Navigation Path: My Office -- Medications -- Rx application -- Start Page -- Patient Summary -- New Order button -- New Medication Order Page -- Select the Drug with starting three letters -- Fill all required fields -- click on 'Insert' button -- click on 'Prescribe' button -- NADEA validation message will not be displayed.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In SmartCare application, if prescriber was not having NADEA number and prescriber was prescribing some medication in Rx Application, then NADEA validation message was displayed in the below mentioned prescription screens.

- New Medication Order page.
- Reorder Medication
- Change Order Medication
- Complete Order Medication
- Queued Order
- Verbal Order Medication.

With this release, the logic has been modified to remove the NADEA validation. Now, NADEA validation message will not display for the medication during the medication prescription in the below mentioned prescription screens:

- New Medication Order page
- Re Order Medication.
- Change Order Medication
- Complete Order Medication
- Queued Order
- Verbal Order Medication.

Author: Manjunath Malipatil

120. EII # 126318: Implementation to send the 'State License' IN Request XML which is required to stay on compliance with the state PMP Process.

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

Prerequisite: State License Degree is added to the Staff and is active through the **path:**

Login to SmartCare Application -- Staff/Users -- In Staff/Users list screen click on Staff Name Hyperlink -- In Staff Details Screen Click on Licenses/Degree Tab -- Add State License Degree to the staff -- Click on Save Button.

Navigation Path: Login to RX Application -- In Start Page click on Patient Search -- Perform Patient Search -- Select a Patient -- Patient Summary Screen -- Click on PMP Button.

Functionality 'Before' and 'After' release:

Purpose: The Staff License is required to be in compliance for the PMP Process with the State of California.

With this Release, a new global code called '**State License**' is added under Global code Category 'DEGREE'. This will be included while processing the PMP Requests in Rx Application.

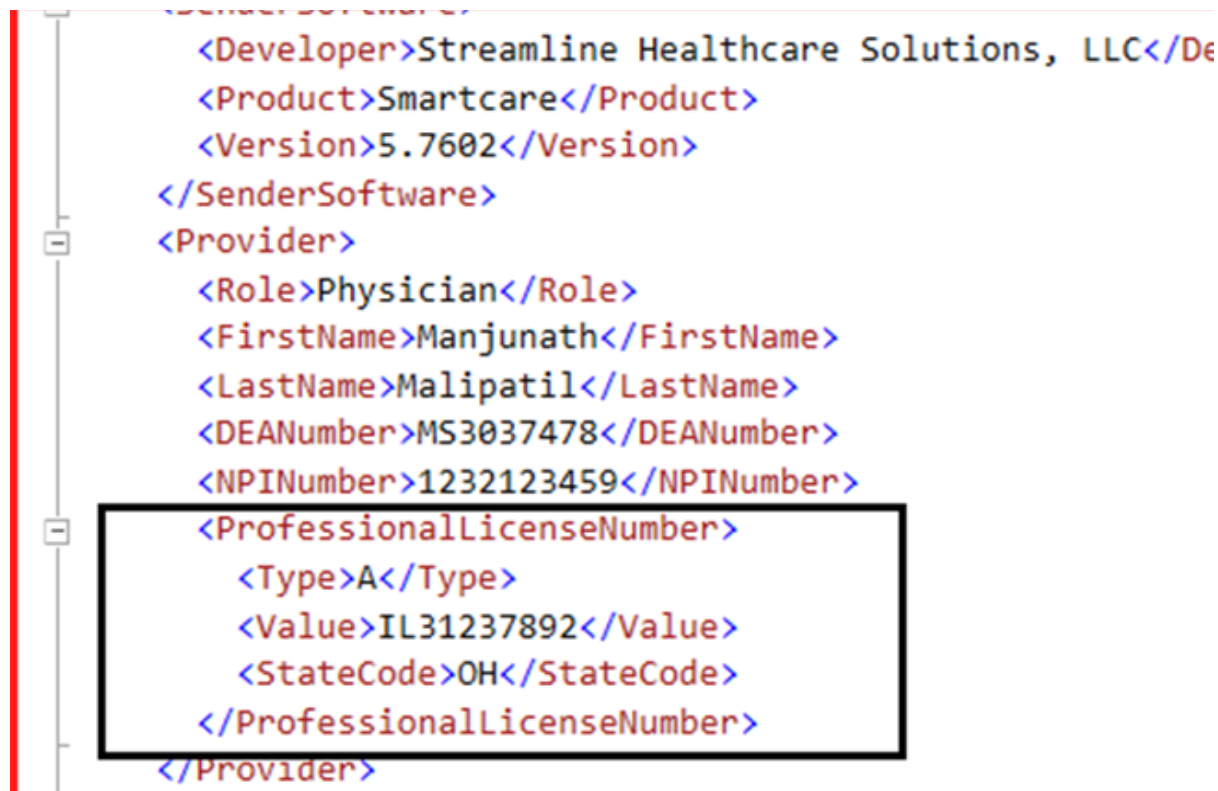
Global Code Details:

Code Name: State License

Global code category: DEGREE

When the Staff License is added to the staff in License/Degree tab under Staff Details Screen and the added State license is active, and the State License State matches with the PMPState column in the PMPwebserviceconfigurations table, then:

On Generating the NaRx Report by clicking on the PMP Button in the Rx Application, the State License Details are included in the Request XML.



```

<Developer>Streamline Healthcare Solutions, LLC</Developer>
<Product>Smartcare</Product>
<Version>5.7602</Version>
</SenderSoftware>
<Provider>
  <Role>Physician</Role>
  <FirstName>Manjunath</FirstName>
  <LastName>Malipatil</LastName>
  <DEANumber>MS3037478</DEANumber>
  <NPINumber>1232123459</NPINumber>
  <ProfessionalLicenseNumber>
    <Type>A</Type>
    <Value>IL31237892</Value>
    <StateCode>OH</StateCode>
  </ProfessionalLicenseNumber>
</Provider>

```

If any of the above requirement is not met, then the Staff License details are not included in the Request XML while processing the PMP Requests.

Global Codes / Category: 'State License' / 'DEGREE'

SAML

Reference No	Task No	Description
121	EII # 125812	Implementation of SAML Login button in mobile for SAML user.

Author: Kiran Tigarimath

121. EII # 125812: Implementation of SAML Login button in mobile for SAML user.

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

Prerequisite:

1. SetSmartCareMobileApplicationURL for the mobile application through below **path**:

'Administration' -- 'Configuration Keys' -- 'Configuration Key Details' Screen -- SetSmartCareMobileApplicationURL.

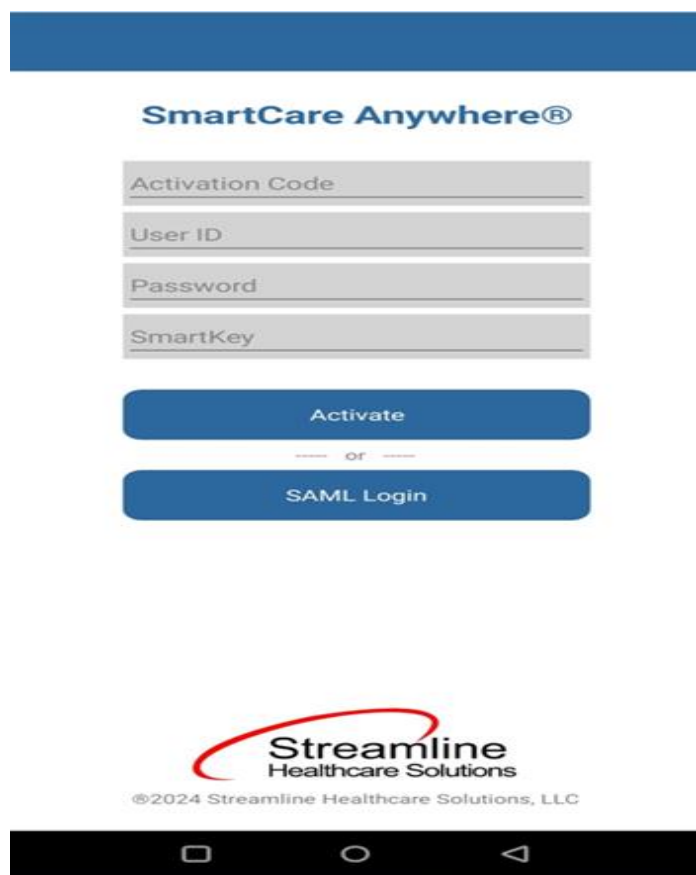
2. The Configuration key 'EnableSAMLIntegration' is set to 'Yes'.

Navigation Path: 'Open mobile app' -- "SmartCare Anywhere".

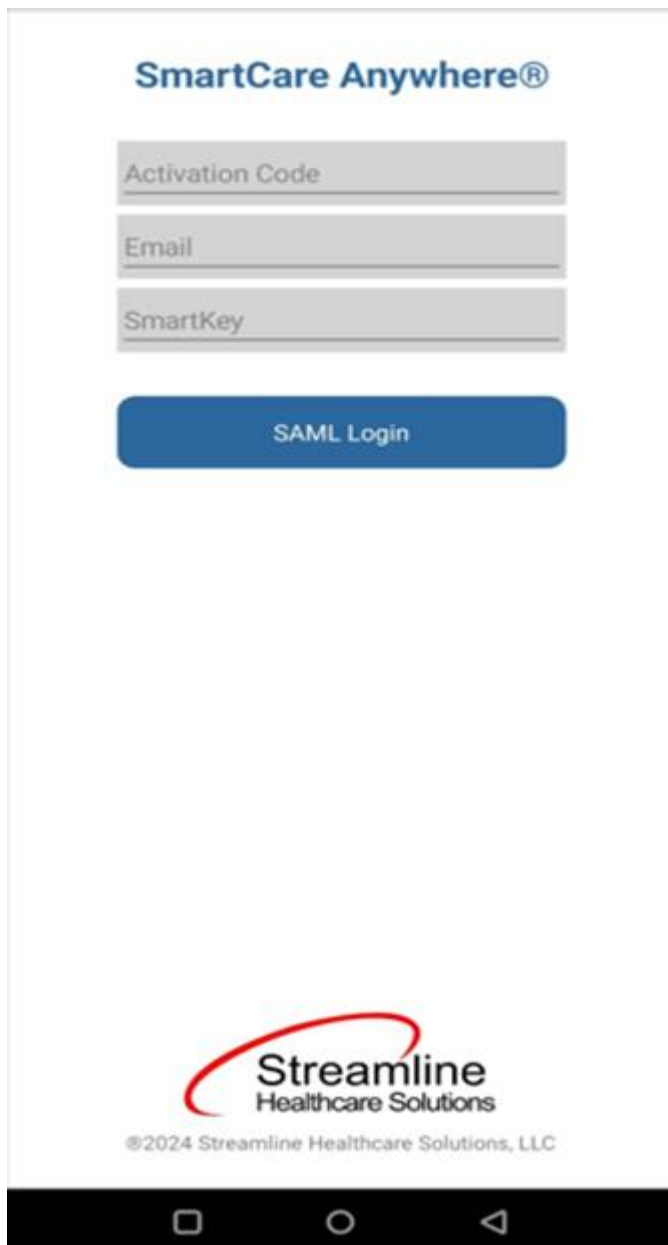
Functionality 'Before' and 'After' release:

With this release, a new SAML login button is implemented for SAML user in the activation page of mobile application (SmartCare Anywhere).

1. Activation page with SAML Login button for SAML user.



2. Once after clicking SAML login button in activation page, the user will be redirected to the page with Activation Code, Email and SmartKey fields. If the user clicks on 'SAML Login' button with valid credentials, then the user is able to login to the application.




SmartCare Anywhere®

Activation Code

Email

SmartKey

SAML Login


©2024 Streamline Healthcare Solutions, LLC

The image shows a mobile application login screen for 'SmartCare Anywhere'. It features three input fields for 'Activation Code', 'Email', and 'SmartKey', followed by a blue 'SAML Login' button. At the bottom, there is a logo for 'Streamline Healthcare Solutions' and a copyright notice for 2024. The screen is framed by a black bar at the bottom with standard Android navigation icons.

3. When a user tried to open the SmartCare application after locking, it will ask the user to enter the 'SmartKey' to login to the application.



4. User will be logged out of the application once the user clicks on the Unlock button three times and then the user will be automatically redirected to the Activation page as shown in the Point 1.



SmartCare Anywhere®

Activation Code

User ID

Password

SmartKey

Activate

----- of -----

SAML Login



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Screens

Reference No	Task No	Description
122	Core Bugs # 127989	Duplicate screen names are displayed.

Author: Aishwarya Bommaklar

122. Core Bugs # 127989: Duplicate screen names are displayed.

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

Navigation Path 1: Go Search -- Search for Scheduler Event screen.

Navigation Path 2: Go Search -- Search for School District Assignment.

Navigation Path 3: Go Search -- Search for Bed Census.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There were duplicate screen entries for the below mentioned screens.

- Scheduler Event screen.
- School District Assignment.
- Bed Census

With this release, the above-mentioned issue is resolved. Now, the duplicate screen entries have been removed for above mentioned screens.

Services

Reference No	Task No	Description
123	Core Bugs # 127683	My Documents and Documents: Error was displayed when the user tried to access the Documents.
124	Core Bugs # 127468	Services are completed even though Do Not Complete is checked.
125	Core Bugs # 127957	Deleted Programs displayed in Programs Dropdown list on Procedure/Rate Screen.
126	Core Bugs # 127890	Psychiatric Evaluation note: Invalid error message is displayed for newly added primary Diagnosis order of 1.
127	EII # 126243	Added a new option in the existing Global Code to create multiple Add On Services.
128	Core Bugs # 128037	Recurring Individual Services: The services are not processed or created even after running the SQL job 'Recurring Appointments And Group Services' still displayed as Service Exists on the 'My Calendar' screen.
129	Core Bugs # 128040	Bundled Services are not created for Inactive clients.
130	EII # 126440	The Signed Date/Time field is added in the Encounter Form tab of Service/Notes and Group Service Notes.
131	EII # 126631	Adding a typeable search text box to display staff in the Services, Groups, Group Services, Service Note.

Author: Niroop Hassan

123. Core Bugs # 127683: My Documents and Documents: Error was displayed when the user tried to access the Documents.

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

Navigation Path 1: 'Client' -- 'Services' -- 'Services' list page -- Click on 'New' icon -- 'Service Details' page -- Enter the required fields and click on 'Save' icon.

Navigation Path 2: 'Client' -- 'Services/Notes' -- 'Services/Notes' list page -- Click on the above created service DOS hyperlink (Navigation 1) -- 'Service Note' page -- Make some changes and click on 'Save' icon.

Navigation Path 3: Go Search -- My Documents (My Office) -- My Documents list page -- click on the Documents hyperlink created in the Navigation path 2.

Navigation Path 4: Go Search -- Documents (Client) -- click on the Documents hyperlink created in the Navigation path 2.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user saved after making some changes in Service Note page, the document was getting created with the document code ID as '1'. Due to this, when the user tried to access the document from My Documents and Documents list page, the below error was displayed:

Error: "Unable to connect with report server"

With this release, the above-mentioned issue has been resolved. Now when the user saves after making some changes in the Service Note page, the document is created with the proper associate note id. And now, the user can access the document from My Documents and Documents list page without any error.

Author: Aishwarya Bommaklar

124. Core Bugs # 127468: Services are completed even though Do Not Complete is checked.

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

Navigation Path 1: Client -- 'Services' Screen -- Click on 'New' icon -- Enter all the required details -- Select 'Do Not Complete' checkbox -- Click on save icon.

Navigation Path 2: My Office -- 'Services' list page -- Select the above Service -- Select 'Complete' action from the 'Select Action' drop down -- Click on 'Yes' in 'Select Action Popup'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The user was able to complete the Service through 'Select Action Pop up' in the Services list page, even though the Service was marked as 'Do Not Complete'.

With this release, the above-mentioned issue has been resolved. Now, the Services which are marked as 'Do Not Complete' cannot be completed from the 'Select Action' Pop up.

Author: Namratha Nagaraj

125. Core Bugs # 127957: Deleted Programs displayed in Programs Dropdown list on Procedure/Rate Screen.

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

Navigation Path 1: 'Administration' -- 'Procedure/Rates' -- Click on 'Procedure Name' hyperlink -- 'Procedure Code Details' page is opened -- Click on 'Rates/Billing Codes' tab -- Click on 'Program' button in the 'Rates' section -- Select 'Program' and click on 'Save' button.

Navigation Path 2: 'Administration' -- 'Procedure/Rates' -- Click on 'All Programs' Dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The user deleted the Programs record added in the 'Rates/Billing codes' tab. After this, if checked in the Programs dropdown of 'Procedure/Rates' list page, the deleted Programs were displayed.

With this release, the above-mentioned issue has been resolved. Now when the user deletes the Programs record added in the 'Rates/Billing codes' tab and if checks the Programs dropdown of 'Procedure/Rates' list page, then the deleted Programs are not displaying.

Author: Savitha Siddaraju

126. Core Bugs # 127890: Psychiatric Evaluation note: Invalid error message is displayed for newly added primary Diagnosis order of 1.

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

Navigation Path: Services/Notes (Client) -- click on new icon -- Select Procedure for Psychiatric Evaluation -- Enter all the required fields -- Note tab -- Diagnosis sub-tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When a user attempts to add a new diagnosis and modifies the existing primary diagnosis order in the Psychiatric Evaluation note, then the below invalid error message was getting displayed.

Error Message: 'Diagnosis order already exists'.

With this release, the above-mentioned issue has been resolved. Now, the user can add a new diagnosis and modify the existing primary diagnosis order in the Psychiatric Evaluation note without any error.

Author: Sahana Gururaja

127. EII # 126243: Added a new option in the existing Global Code to create multiple Add On Services.

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

Prerequisites:

1. Enter the required details in 'Automatic Add On Codes Details' screen through below mentioned **path:** 'Administration' -- 'Automatic Add On Codes' -- click on 'New' button -- 'Automatic Add On Code Details' screen -- enter all the required details and select "Increments of" option in the "Add On Units Logic" field and add the required value in the text box that appears next to "Add On Units Logic" field.

Note: When the "Increments of" option is selected and no value is provided in the textbox next to it, by default it will take 15 mins as increments.

2. Create a service with procedure code that is added in the field "Services with Procedure Code" in 'Automatic Add On Codes Details' screen.

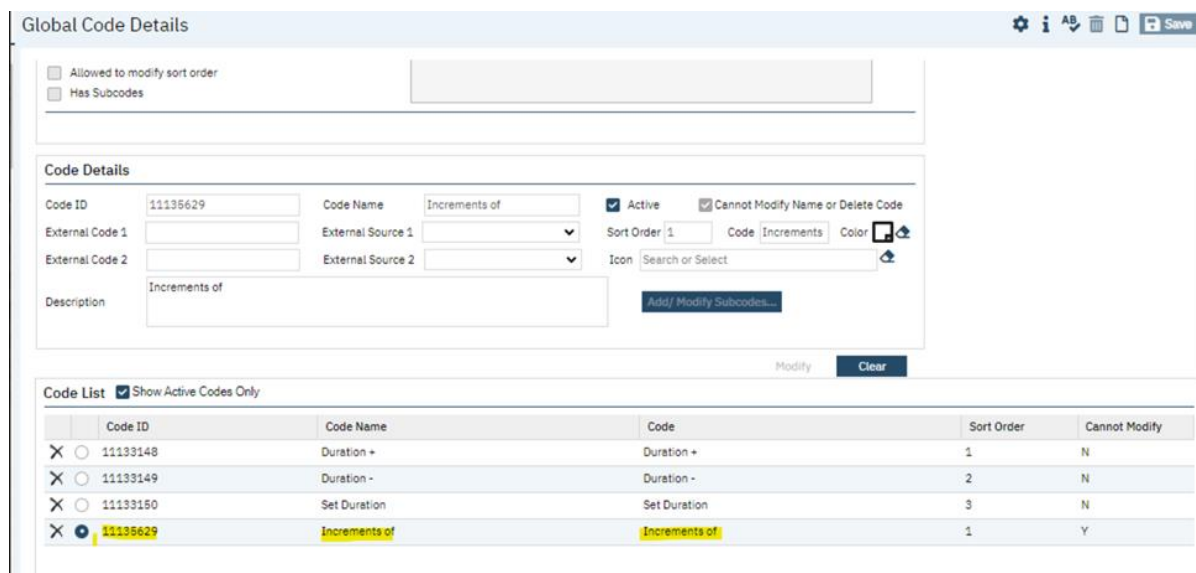
Navigation Path: 'My Office' -- 'Services' -- click on 'New' icon -- 'Service Details' screen -- enter all the required details and select the procedure code that is added in the field "Services with Procedure Code" on in 'Automatic Add On Codes Details' screen -- Enter the duration as required and save the service screen with 'Show' status -- complete the service.

Functionality 'Before' and 'After' release:

Purpose: 'The customer needs to follow the 'a29i' guidelines wherein they need to bill the office visits/outpatient evaluation services based on those guidelines. The prolonged office codes should be sent separately for every 15 minutes rather than one service.

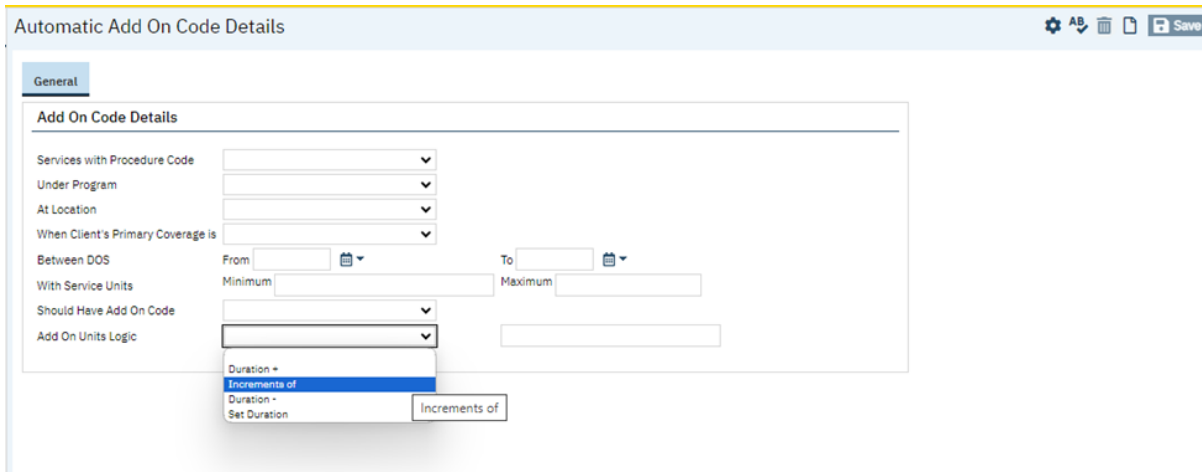
With this release, the following changes have been implemented.

1. A new option "Increments of" is added in the Existing Global Code Categories – "AutoAddOnCodeLogic" which will be displayed in the "Add On Units Logic" drop-down field of 'Automatic Add On Code Details' screen.



The screenshot shows the 'Global Code Details' screen. In the 'Code Details' section, the 'Code ID' is 11135629, 'Code Name' is 'Increments of', and 'Active' is checked. The 'Add On Units Logic' field is set to 'Increments of'. Below this, there is a 'Code List' table showing the details of the code.

	Code ID	Code Name	Code	Sort Order	Cannot Modify
X	11133148	Duration +	Duration +	1	N
X	11133149	Duration -	Duration -	2	N
X	11133150	Set Duration	Set Duration	3	N
X	11135629	Increments of	Increments of	1	Y



2. When the "Increments of" option is selected and no value is provided in the textbox next to it, by default it will take 15 mins as increments.

3. When the "Increments of" option is selected and a value is provided (for example, 15) in the textbox next to it, it will take that provided value as increments minutes to create add-on services.

Example:

1. When a user creates a data in the 'Automatic Add On Codes Details' screen with "Increments of" option and added 15min value in the text field.

On completing the service with procedure code that is added in the field "Services with Procedure Code" on in 'Automatic Add On Codes Details' screen with "60mins" of total duration with start time as '6:00 Am', then user will be able to see a '4' service created with 15 mins of duration with a procedure code that is selected in "Should Have Add On Code".

1st Add-On code Service - 15 mins, start time 6:00 am to 6:15am

2nd Add-On code Service - 15 mins, start time 6:15 am to 6:30am

3rd Add-On code Service - 15 mins, start time 6:30 am to 6:45 am

4th Add-On code Service – 15mins, start time 6:45 am to 7:00 am

2. If the total service duration of Add-On code is 32 minutes and if we set 10 minutes in the Automatic Add-on code screen, then three Add-On code services will be created.

1st Add-On code Service - 10 mins

2nd Add-On code Service -10 mins

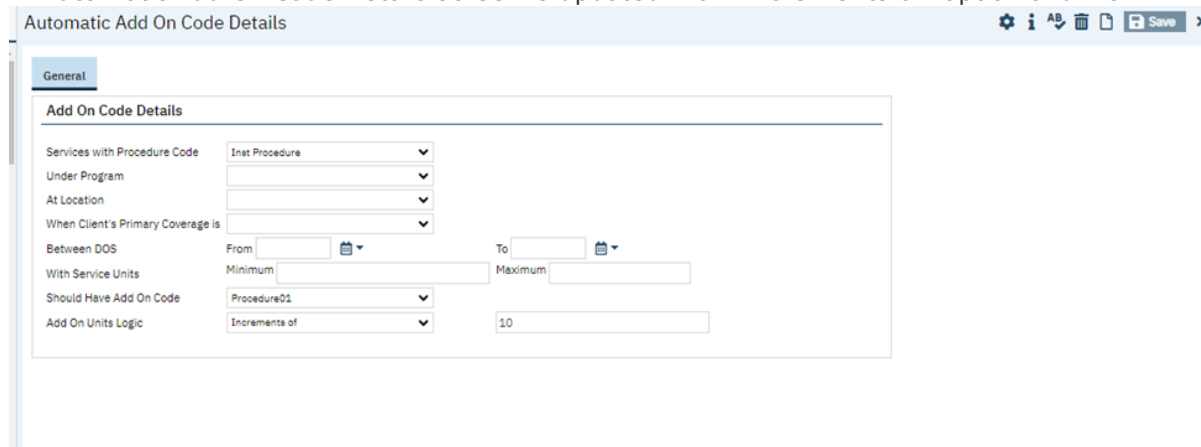
3rd Add-On code Service - 10 mins

4 th Add-On code Service – 2 mins

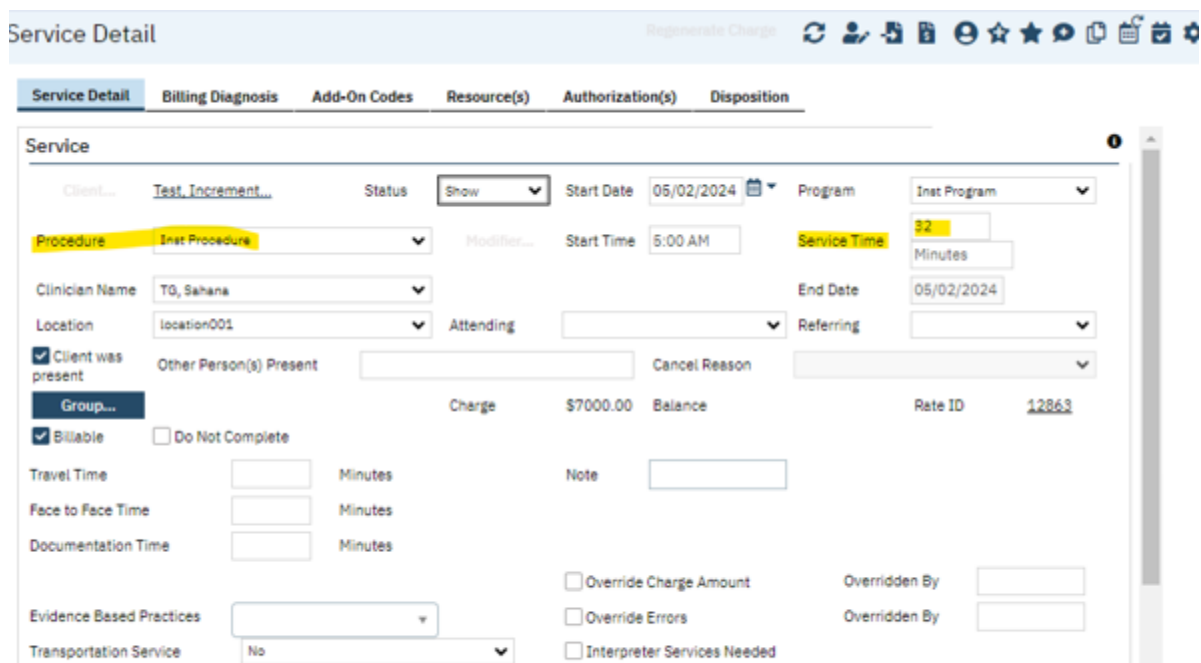
Even though the fourth Service is 2 mins in duration, if the rate exists the service will be completed, if the related rate doesn't exist, the system will display the validation message as "Automatic Add On Code—Unable to find the matching rate for selected procedure". The user can override the service error and can complete the main service. In this case, the service with 2mins will be considered as non-billable charge.

Example:

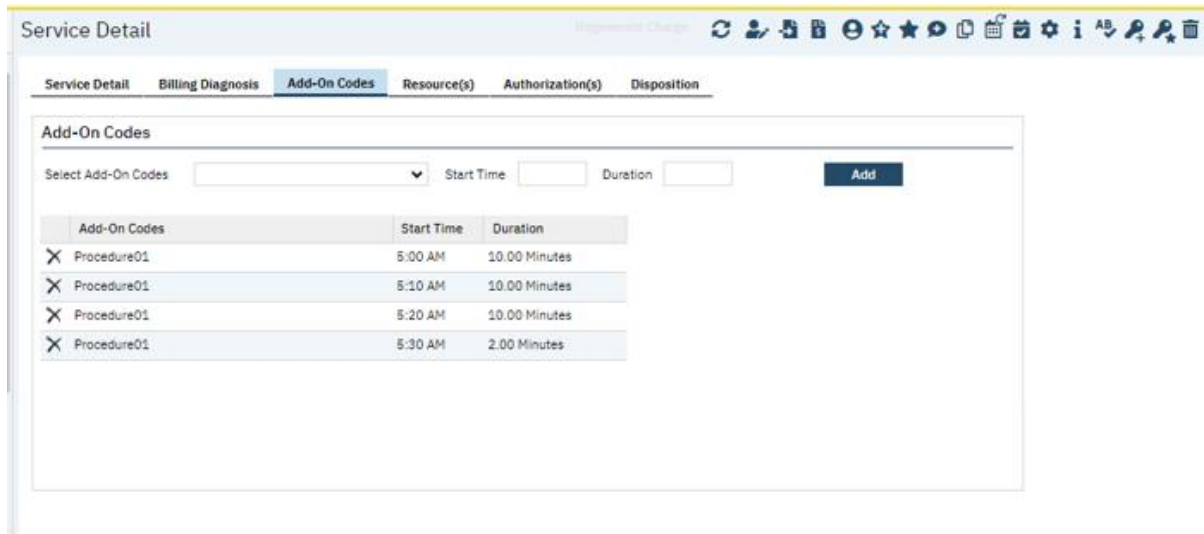
1. Automatic Add On Code Details screen is updated with "Increments of" option and '10min' in the text box.



2. Created service of "32mins" duration with procedure code that is added in the field "Services with Procedure Code" on in 'Automatic Add On Codes Details' screen.



3. The respective add on code services are created with expected duration and start time based on "Increment Of" add on units.



Note: The same workflow will be applicable when the user uses the screen Service Note and Group service Detail.

Author: Aishwarya Bommaklar

128. Core Bugs # 128037: Recurring Individual Services: The services are not processed or created even after running the SQL job 'Recurring Appointments And Group Services' still displayed as Service Exists on the 'My Calendar' screen.

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

Navigation Path 1: 'Client' search -- 'Services' screen -- Click on 'New' icon -- Enter all the required fields -- Click on 'Save' icon -- Click on 'Make Recurring' icon -- Select the recurring pattern and Select the 'Recurrence End Date' more than the number of days specified in the configuration key 'NumberOfDaysRecurringServicesSchedule' -- Select 'Create Immediately' check box -- Click on 'OK' button.

Navigation Path 2: Run the SQL job 'Recurring Appointments And Group Services'.

Navigation Path 3: 'My Office' -- 'Staff Calendar' -- Check for the Services created after the value entered in 'NumberOfDaysRecurringServicesSchedule'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a Recurring Service was created with an end date more than the number of days specified in the configuration key 'NumberOfDaysRecurringServicesSchedule', the services would not be processed or created even after running the SQL job 'Recurring Appointments And Group Services'. Consequently, these services would appear as 'Service Exists' on the 'My Calendar' screen.

With this release, the above-mentioned issue has been resolved. Upon executing the 'Recurring Appointments And Group Services' job, all the services in the queue within the specified time frame were successfully created and processed, and are now displayed in the Staff Calendar.

Author: Suganya Sivakumar

129. Core Bugs # 128040: Bundled Services are not created for Inactive clients.

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

Prerequisites: The client is active at the date of service creation.

Navigation Path 1: Client Search -- Select Client -- Services -- Click on New icon -- Service Detail Page -- Enter all the required fields -- Select the status as 'Complete' -- Click on Save.

Navigation Path 2: Client Search -- Select Client -- Client Information(C) -- General tab -- uncheck the Active checkbox -- Click on save.

Navigation Path 3: Go search -- Services (My office) -- Search for the above completed services (mentioned in the Navigation path1) -- Select the service -- Select Generate Bundled Service value from the Select Action dropdown.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The Generate Bundled Service was not created for inactive Clients.

With this release, the above-mentioned issue has been fixed. Now, the Generate Bundled Service is created for Inactive Clients.

Author: Suganya Sivakumar

130. EII # 126440: The Signed Date/Time field is added in the Encounter Form tab of Service/Notes and Group Service Notes.

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

Prerequisite: In the Document Code Detail screen, the "Show Encounter Form" option is selected as 'Yes' for Service Notes and Group Service Notes.

Navigation Path 1: Perform Client Search -- Select Client -- Navigate to Services/Notes -- Client -- Service/Note List Page -- Click on New Icon -- Service Note detail page -- Select Prog/Proc/Loc values -- Navigate to Encounter form tab -- In General Section -- Enter all the required information -- Click on Save -- Sign the Service Note.

Navigation Path 2: My office -- Groups -- Groups List page -- Click on New Icon -- Group Detail page -- Mode of Delivery dropdown field -- 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 3: Navigate to Group Service Detail Screen -- Enter all the required fields in the Service Tab -- Under the Encounter Form tab -- In the General section -- Enter all the required information -- Click on Save Button -- Navigate to Note tab -- Click on Sign Button -- Signature popup displays -- PDF generated.

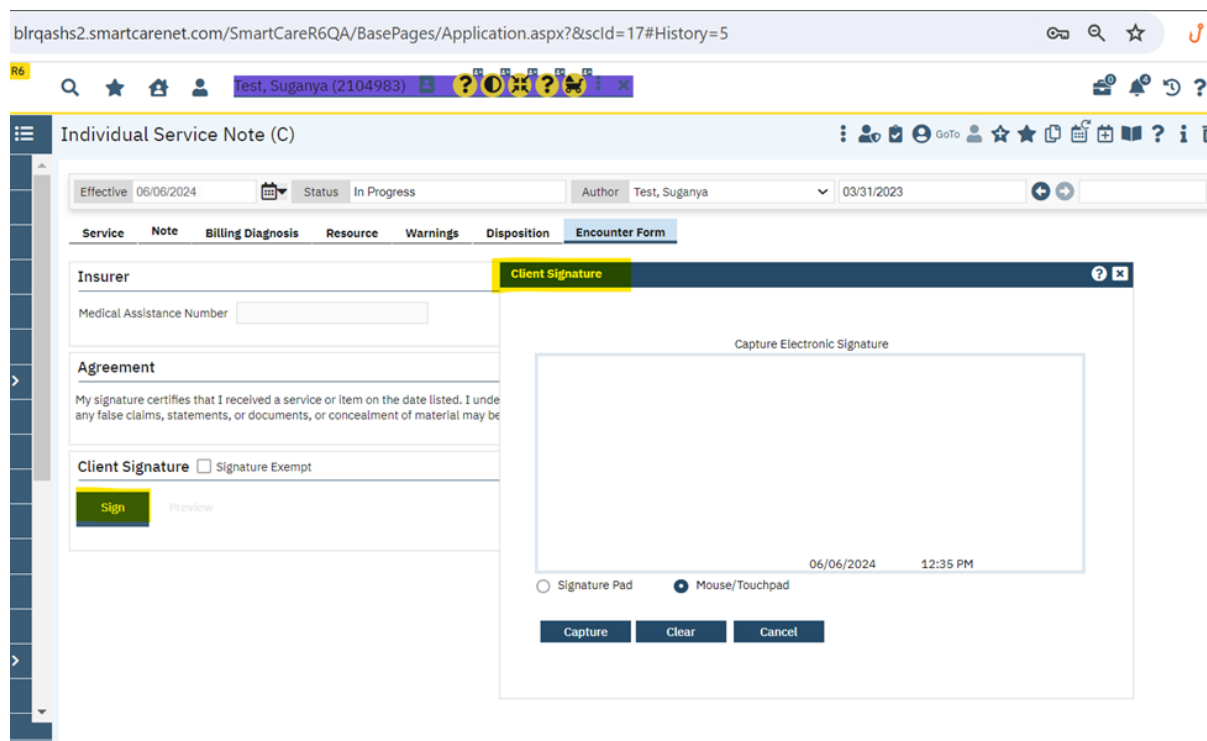
Functionality 'Before' and 'After' release:

Purpose: The staff needs 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 Text Field "Signed Date/Time" is added in the Client Signature section in the Encounter Form tab.

1. Once the Client clicks on Sign button a Signature popup screen will be displayed. On signing, the Signed date and time is captured in this field.

Screenshot for Service/Note:



The screenshot displays the Streamline Healthcare application interface. The main window is titled "Individual Service Note (C)" and shows a form for a service note. The "Encounter Form" tab is selected. The form includes fields for "Effective" date (06/06/2024), "Status" (In Progress), "Author" (Test, Suganya), and "Disposition" (03/31/2023). The "Client Signature" section is highlighted, showing a "Sign" button and a "Signature Exempt" checkbox. A "Client Signature" popup screen is displayed over the form, titled "Capture Electronic Signature". The popup contains a large text area for the signature, a date and time stamp (06/06/2024 12:35 PM), and radio buttons for "Signature Pad" and "Mouse/Touchpad". The "Mouse/Touchpad" option is selected. At the bottom of the popup are "Capture", "Clear", and "Cancel" buttons.

Psychiatric Note

Effective: 06/04/2024 Status: In Progress Author: Test, Suganya 03/04/2024

Service	Note	Billing Diagnosis	Resource	Warnings	Disposition	Encounter Form
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.						
Client Signature <input type="checkbox"/> Signature Exempt						
<input type="button" value="Edit"/> <input type="button" value="Preview"/>						
Client signed the Encounter Form Signed Date/Time: 06/04/2024 12:22 AM						

Screenshot for Group Service Note:

blrqashs2.smartcarenet.com/SmartCareR6QA/BasePages/Application.aspx?&scId=17#History=12

Test, Suganya (2104983)

Group Service Detail

Service

Client Signature

Location

Place of Service

Status

Evidence Based

Clients

06/06/2024 5:26:44 PM

Signature Pad Mouse/Touchpad

Capture Clear Cancel

Client Signature ☐ Signature Exempt

Sign Preview

Warnings and Errors

Group Service Detail

Service Note Other

Place of Service

Status Show

Evidence Based Practices

Clients ☐ Show Clients With Errors

Test, Juan (2104628) ? !

Test, Max (2104629) ? !

Service Information Custom Fields Billing Diagnosis Warnings and Errors

Insurer

Medical Assistance Number 65434

Agreement

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

Client Signature ☐ Signature Exempt

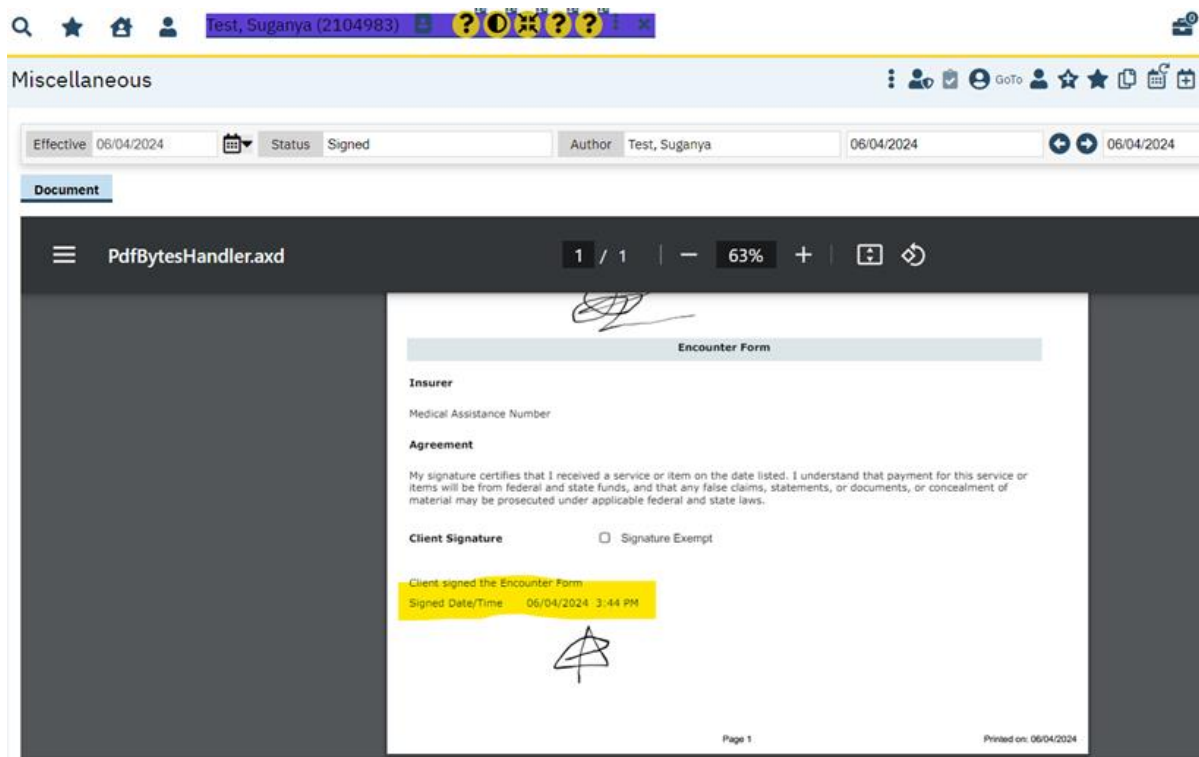
Edit Preview

Client signed the Encounter Form

Signed Date/Time 06/04/2024 5:10 PM

2. After Signing Service Note and Group Service Note in the Encounter Form, the new text field Signed Date/Time is displayed in the Service/Note PDF and Group service PDF.

Screenshot for Service/Notes:



Miscellaneous

Effective 06/04/2024 Status Signed Author Test, Suganya 06/04/2024

Document

PdfBytesHandler.axd 1 / 1 63%

Encounter Form

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.

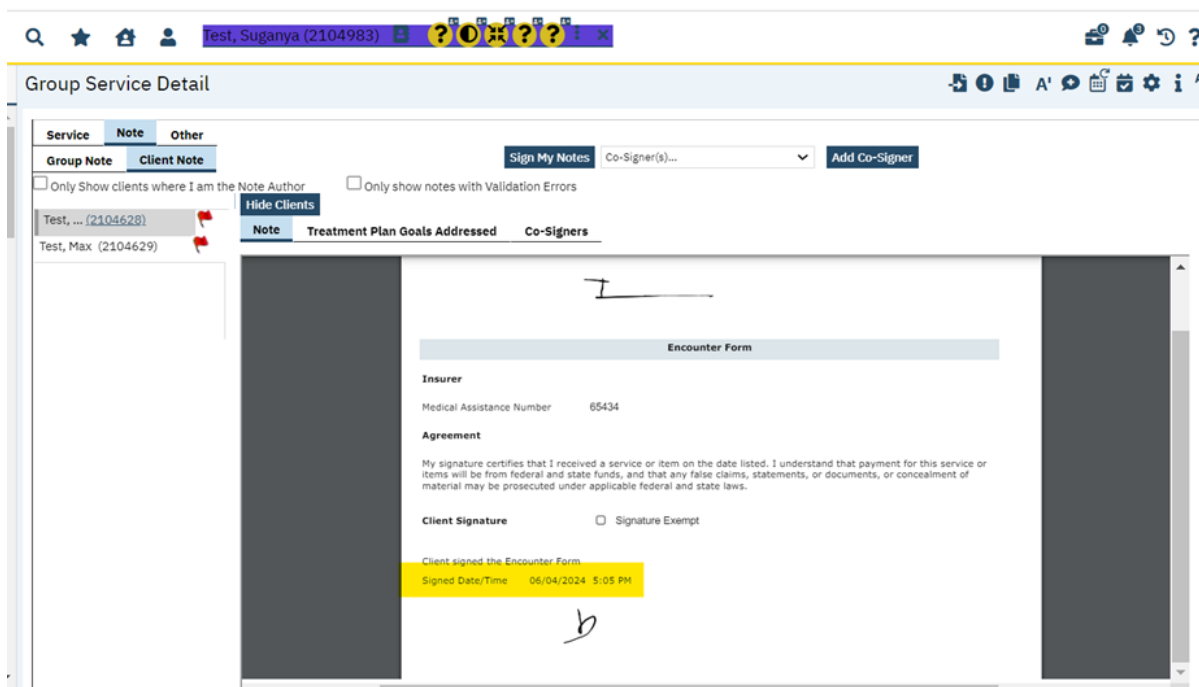
Client Signature ☐ Signature Exempt

Client signed the Encounter Form

Signed Date/Time 06/04/2024 3:44 PM

Page 1 Printed on: 06/04/2024

Screenshot for Group Service Notes:



Group Service Detail

Service Note Other

Group Note Client Note

Sign My Notes Co-Signer(s)...

Add Co-Signer

Only Show clients where I am the Note Author

Only show notes with Validation Errors

Hide Clients

Test, ... (2104628)

Test, Max (2104629)

Note Treatment Plan Goals Addressed Co-Signers

Encounter Form

Insurer

Medical Assistance Number 65434

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

Signed Date/Time 06/04/2024 5:05 PM

Data Model Changes: ClientSignatureDateTime column added in the Table ServiceEncounterForms.

Author: Aishwarya Bommaklar

131. EII # 126631: Adding a typeable search text box to display staff in the Services, Groups, Group Services, Service Note.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes'.

Navigation Path 1: My Office -- Groups -- Groups list page -- Click on Group name hyperlink -- Group Detail -- Click on Schedule tab -- Click on Create New Group Service button -- Select the Clients, enter the Service Date -- Click on OK button -- Group Service Details page.

Navigation Path 2: My Office -- Service screen.

Navigation Path 3: Client -- Services screen -- Services list page -- Click on New icon -- Service Detail screen.

Navigation Path 4: Client -- Services/Notes screen -- Services/Notes list page -- Click on new icon -- Service Note screen.

Functionality 'Before' and 'After' release:

Purpose: The staff dropdowns are not responsive enough when there are a large number of active staffs in the environment. Ideally, the staff drop downs are typeable search text boxes as per standards.

With this release, the Staff drop down field is modified as a Typeable search text box for Clinician and Attending fields in the below mentioned screens. This change will occur when the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set as 'Yes'.

1. Services under My Office – All Clinician and All Service Entry Staff.
2. Groups list page – All Staff field in filter section.
3. Group Serves list page – All Staff field in the filter section.
4. Group Service Detail screen – Attending and Clinician Name fields.
5. Services list page - All Clinician field in filter section.
6. Service Details screen - Attending and Clinician Name fields.
7. Services/Notes list page - All Clinician field in filter section.
8. Service Note screen – Attending field.

Services (My Office)

Services (299)

Select Action

All Services All Service Statuses Include Do Not Complete All Programs Financial Assignment... Apply Filter

All Locations All Procedure Codes All Clinician All Service Entry Staff All Service Areas

Service Id Entered From Entered To DOS From 04/29/2023 DOS To 04/29/2024

☐ Include Services created from Claims ☐ Only include Services with Add On Codes ☐ Only show Non-Billable Services ☒ Show Only Active Clients

Client Name Organizational Hierarchy...

Select: All, All on Page, None

Client Name	DOS	Units	Charge (Rate Id)	Procedure	Status	Clinician	Program	Location	Com
<input type="checkbox"/> Test_Core (1185)	12/29/2023 10:00 AM			Test QA Procedure Grp	Schedul...	Test, Aishu B	Test QA Prog...	Test QA Loca...	

Groups:

Groups (1)

test Active Groups All Staff Programs All Locations Attendance Apply Filter

Group	Program	Location	Procedure	Staff 1	Staff 2	Staff 3	Staff 4	Attendance
Test D2	1010Programs	1019_Location_1	1300procedure	Test, Aish...				No

Group Services list page:

Group Services (2)

All GroupType All Groups All Staff All Statuses All Programs Apply Filter

Custom From 05/01/2024 To 05/09/2024

Group	Clients	Status	Date	Program	Staff 1	Staff 2	Staff 3	Staff 4	Recurrence
Test EF group...	2	Show	05/27/2024 05:00 PM	Rashmi K	Test, Sugany...	Sinha, Ankit...			
123	4	Show	05/03/2024 06:00 AM	1300Prgm1& Test, Sugany...	Jesudurai, A...	Sinha, Ankit...			

Group Service Detail screen:

Group Service Detail

Service Note Other

Evidence Based Practices

Clients ☐ Show Clients With Errors

Test, 123 (2104898) TEST, 2504 (2105010) Test, 876 (2104964)

Service Information Custom Fields Billing Diagnosis Add-On Codes Wa

Procedure AK_Procedure10 Set All Set Some

Start 7:00 AM Service Time 30 Minutes Set All Set Some

Status Show Set All Set Some

Cancel Reason Set All Set Some

Program 2049 program Set All Set Some

Clinician Test, Aishu Set All Set Some

Attending Anderson, Dawn Set All Set Some

Mode Of Delivery Video Conference Set All Set Some

Billable ☒ Set All Set Some

Transportation Service No Set All Set Some

Interpreter Services Needed ☐ Set All Set Some

Travel Time Minutes Set All Set Some

Services List page:

Services (198)

Show Services Only All Statuses All Clinician Apply Filter

All Programs DOS From 11/30/2023 DOS To Include Services created from Claims

☐ Only include Services with Add On Codes

DOS	Procedure	Group Name	Units	Status	Clinician/Provider	Program	Loca
05/30/2024 07:00 AM	1111 10 Units			Show	Test, Suganya Nurse ...	1010Programs	1015
05/30/2024 06:00 AM	1111 1 Units			Scheduled	Test, Suganya Nurse ...	1010Programs	1015
05/29/2024 06:00 AM	1111 10 Units			Show	Test, Suganya Nurse ...	Test Prog 1	007

Service Detail:

Service Detail

Regenerate Charge

Service Detail Billing Diagnosis Add-On Codes Resource(s) Authorization(s) Attachment(s) Disposition

Service

Client... Client_New Status Show Start Date 05/30/2024

Program 1010Programs

Procedure 1111 Modifier... Start Time 7:00 AM Duration 10 Units

Clinician Name Test, Suganya End Time 7:00 AM End Date 05/30/2024

Location 1019_Location_4 Attending Belagali, Sunil Referring

☒ Client was present Cancel Reason

Group... Charge \$0.00 Balance Rate ID

☒ Billable

Service/Notes list Page:

Services/Notes (208)

All Clinician All Statuses All Procedures Other Apply Filter

Show Services and Care Mgmt Claims Past 12 Months From 05/30/2023 To All Programs

☐ Include Services created from Claims ☐ Only include Services with Add On Codes

Auth	DOS	Status	Document	Group Name	Procedure	Clinician	Program	Comment	Add On Codes	Attachment(s)
	05/30/2024 07:00	Show	Lethality Asses...		1111 10.00 Units	Test, Suganya	1010Programs			
	05/30/2024 06:00	Sched...			1111 1.00 Units	Test, Suganya	1010Programs			
	05/29/2024 06:00	Show	Lethality Asses...		1111 10.00 Units	Test, Suganya	Test Prog 1			
	05/28/2024 02:00	Sched...	Lethality Asses...		1111 10.00 Units	Test, Aishu B	Test Prog 1			
	05/28/2024 10:00	Sched...			1111 10.00 Units	Test, Aishu B	Test Prog 1			
	05/27/2024 04:00	Sched...	Individual Serv...	test 1	Test1 10.00 Minutes	Test, Suganya	ACTest8			
	05/26/2024 01:00	Sched...	Misc G/O	Test group...	1300procedure 1.00 Mi...	Test, Neelima	1019_Program_1			
	05/25/2024 01:00	Sched...	Misc G/O	Test group...	1300procedure 1.00 Mi...	Test, Neelima	1019_Program_1			

Services Notes:

Miscellaneous

Effective 04/30/2024 Status To Do Author Test, Aishu 05/30/2024

Service Note Billing Diagnosis Resource Warnings Disposition Encounter Form

Service

Status Scheduled Start Date 04/30/2024 Geo Location

Program Test Prog 1

Procedure 123456 Modifier... Start 11:00 AM Total Duration 10 Minutes

Location1 007

Clinician Test, Aishu Attending 222, Sunil Referring

Specific Location

☒ Cancel Reas... Transportation Service No ☐ Interpreter Services Needed

☒ Client was present

Note: When the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set as 'No', the staff dropdowns are retained.

Services/Notes

Reference No	Task No	Description
132	Core Bugs # 128006	Quick Order screen: An error message is displayed when trying to save the data.
133	Core Bugs # 127934	Psychiatric Note: The entered data is erased when the user tries to enter the data in the 'Today's Chief Complaint/Reason for Visit' field and clicks on the 'Same as Last Visit' button.
134	Core Bugs # 128107	Psychiatric Note PDF: The text in the 'Plan' section of the PDF was being cut off on the right side when the user signed the 'Psychiatric Note'.
135	Core Bugs # 127978	Duplicate Client ID appears when opening a respective Co-Sign description from Supervisee Documents.
136	Core Bugs # 128084	Goals/Objectives not initialized into ISN when selected in ISP interventions.

Author: Lakshmi Kumarappan

132. Core Bugs # 128006: Quick Order screen: An error message is displayed when trying to save the data.

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

Navigation Path: 'Client' Search -- select a Client -- 'Quick Order' screen -- 'New' icon -- Enter the required field and click 'Add Order' button -- Click Save button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When a user clicked on the 'Add order' button and attempted to save the data in the Quick Order screen, the below mentioned error message was displayed.

Error Message: "Violation of PRIMARY KEY constraint 'DocumentPsychiatricNoteAIMSs_PK'. Cannot insert duplicate key in object 'dbo. DocumentPsychiatricNoteAIMSs.....' "

With this release, the above-mentioned issue has been resolved. Now, the user can save the data in the 'Quick Order' screen without encountering an error message.

Author: Sunita Biradar

133. Core Bugs # 127934: Psychiatric Note: The entered data is erased when the user tries to enter the data in the 'Today's Chief Complaint/Reason for Visit' field and clicks on the 'Same as Last Visit' button.

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

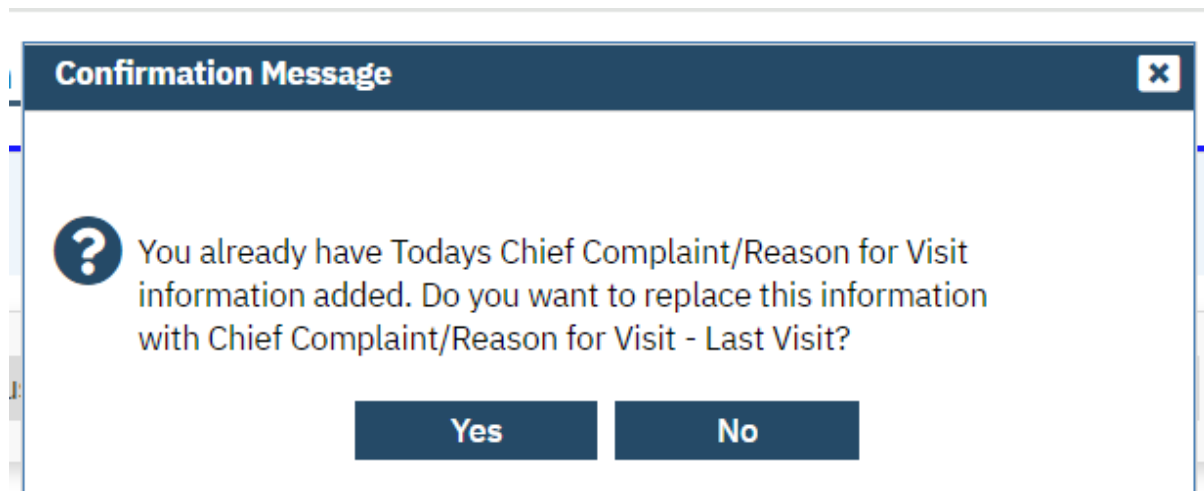
Navigation Path: 'Client' search -- Open a Client -- Go to the 'Services/Notes' -- click on the 'New' icon -- Select the Procedure related to 'Psychiatric Note' -- Enter all the required details in the 'Service' tab -- Click on 'Note' tab -- General Tab -- 'Today's Chief Complaint/Reason for Visit' field -- Enter all the required details -- 'Save' -- Click on 'Sign' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user entered the data in the 'Today's Chief Complaint/Reason for Visit' field and clicked on the 'Same as Last Visit' button, the entered data was erased under the 'Psychiatric Note'.

With this release, the above-mentioned issue has been resolved. Now, the below Confirmation message pop-up is displayed to prevent data loss when the user enters data in the 'Today's Chief Complaint/Reason for Visit' field and clicks on the 'Same as Last Visit' button under the 'Psychiatric Note' field.

Confirmation Message: "You already have Todays Chief Complaint/Reason for Visit information added. Do you want to replace this information with Chief Complaint/Reason for Visit - Last Visit?"



Author: Manjunath Malipatil

134. Core Bugs # 128107: Psychiatric Note PDF: The text in the 'Plan' section of the PDF was being cut off on the right side when the user signed the 'Psychiatric Note'.

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

Prerequisite:

The System configuration Key 'ShowPlanSectionBelowOtherNotesSectionInCorePsychNotePDF' is set to be 'Yes'.

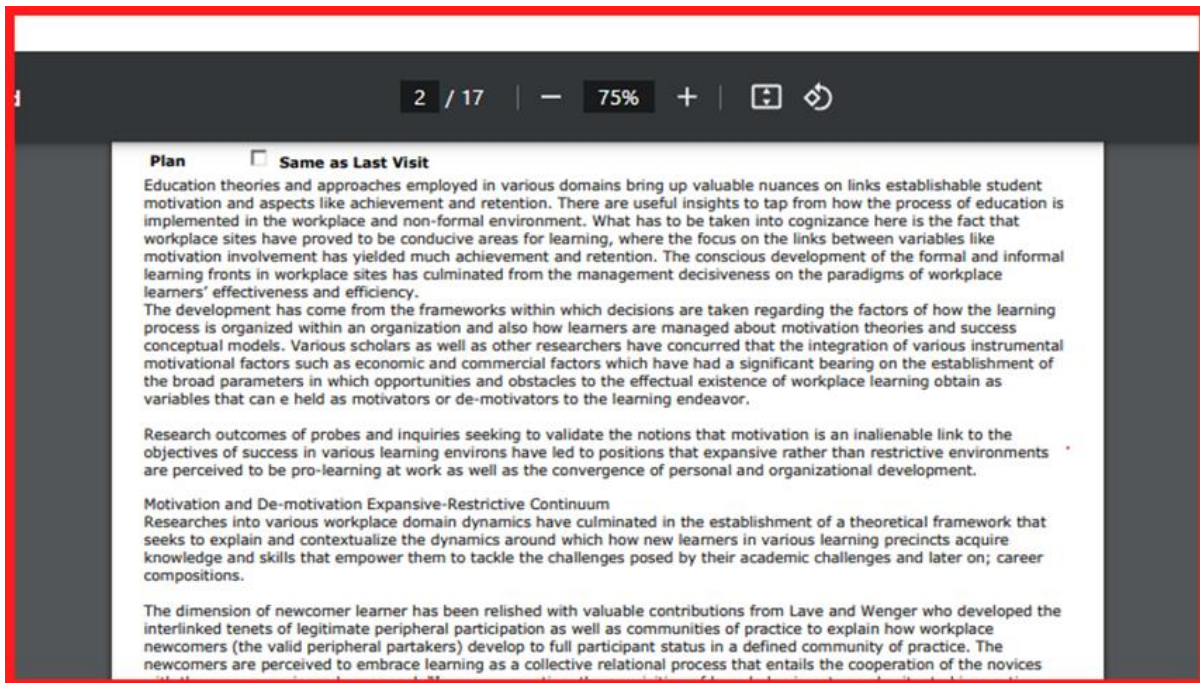
Navigation Path: Login to 'SmartCare Application' -- Select a client -- 'Services/Notes (Client)' -- Click on the 'New' Button -- in the 'Service Details' Screen Enter all the required fields -- Select a procedure related to 'Psychiatric Note' -- Click on 'Note' tab -- Enter all the required Field -- Click on 'Sign' Button and 'Sign' The Note -- Check the Plan Field Text in the PDF.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The text in the 'Plan' section of the PDF was cut off on the right side when the user signed the 'Psychiatric Note'. This made it difficult for the user to understand the sentences.

With this release, the issue mentioned above has been resolved. Now, the text in the 'Plan' section of the 'Psychiatric Note' PDF displayed properly on the right side when the user signs the 'Psychiatric Note'. Refer the below screenshot.

PDF:



Author: Sunita Biradar

135. Core Bugs # 127978: Duplicate Client ID appears when opening a respective Co-Sign description from Supervisee Documents.

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

Prerequisites:

Service note, Treatment plan/Care plan is Co-signed with the respective clinician by following the below **path**:

Open a Client -- Navigate to Go Search -- Enter either any plan Care Plan/Treatment plan/Individualized Service Plan and select -- Enter all the required details -- Click on sign button -- co-sign - Widgets is enabled on the dashboard.

Navigation Path 1: Login into the SmartCare application -- Navigate to go search -- select My Preferences -- General Settings -- select Dashboard.

Navigation Path 2: Open a Client -- Go to the 'Services/Notes' -- Create New -- Select the Procedure related to the respective Service note/Care Plan/Treatment plan/Individualized Service Plan -- Enter all the required details in the 'Service' tab -- Click on 'Note' tab -- Enter all the tab details -- Click on 'Sign' button -- Co-Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When a user opened the Co-Signed document from widgets Supervisee Documents, the duplicate Client Id's were displayed in respective Co-Signed Service Notes, Care plans/Treatment plan/Individualized Service Plan.

With this release, the above-mentioned issue has been resolved. Now, the Co-Signed Documents do not display any duplicate Client ID's when opened from Supervisee Documents.

Author: Kiran Yogendra

136. Core Bugs # 128084: Goals/Objectives not initialized into ISN when selected in ISP interventions.

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

Prerequisite: The Individualized Service Plan is signed with at least one active Goal & Objective.

Navigation Path: 'Client' Search -- Select a Client -- Go to the 'Clinical Documents' -- Click on the 'Services/Notes' -- Click on 'New' icon -- Select the Procedure related to the 'Individual Service Note (C)' -- Enter all the required values -- Go to 'Note' tab -- 'ISP Objectives Addressed by this Service' -- Check for the 'Goals & Objectives' initialized.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Goals & Objectives' were not initialized from the Individualized Service Plan (ISP) to the 'ISP Objectives Addressed by this Service' section of the Individual Service Note.

With this release, the above-mentioned issue has been resolved. Now, the 'Goals and Objectives' are initialized from the 'Individualized Service Plan (ISP)' to the ISP Objectives Addressed by this Service' section of the 'Individual Service Note'.

SmartCare Improvements

Reference No	Task No	Description
137	Core Bugs # 127842	Favorite Disappeared when the user clicked on the 'Favorite' search icon.
138	EII# 126928	Implemented the permissions to Keyboard Shortcuts keys so that only permissioned users will be able to view the required Keyboard Shortcuts.
139	Core Bugs # 127991	New Password Expiring Right After Being Set
140	EII # 126660	Json.js Preventing WalkMe Editor Functions.
141	EII # 126687	Implementing 'External Identification' Tab in Client Information(C) screen and "External ID" search field on Client Search pop up.

Author: Abhishek Naik

137. Core Bugs # 127842: Favorite Disappeared when the user clicked on the 'Favorite' search icon.

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

Prerequisite: Create the favorites for any list page in the 'SmartCare application'.

Navigation Path: Click on the 'Favorite' search icon (Star icon)'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Favorites' were not loading when the user clicked on the 'Favorite' search icon.

With this release, the above-mentioned issue has been resolved. 'Favorites' are loading fine now when the user clicks on the 'Favorite' search icon.

Author: Rakesh Naganagoda

138. EII # 126928: Implemented the permissions to Keyboard Shortcuts keys so that only permissioned users will be able to view the required Keyboard Shortcuts.

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

Navigation Path 1: Login to SmartCare application -- Administration -- 'Staff Details' screen -- 'Roles/Permissions' tab.

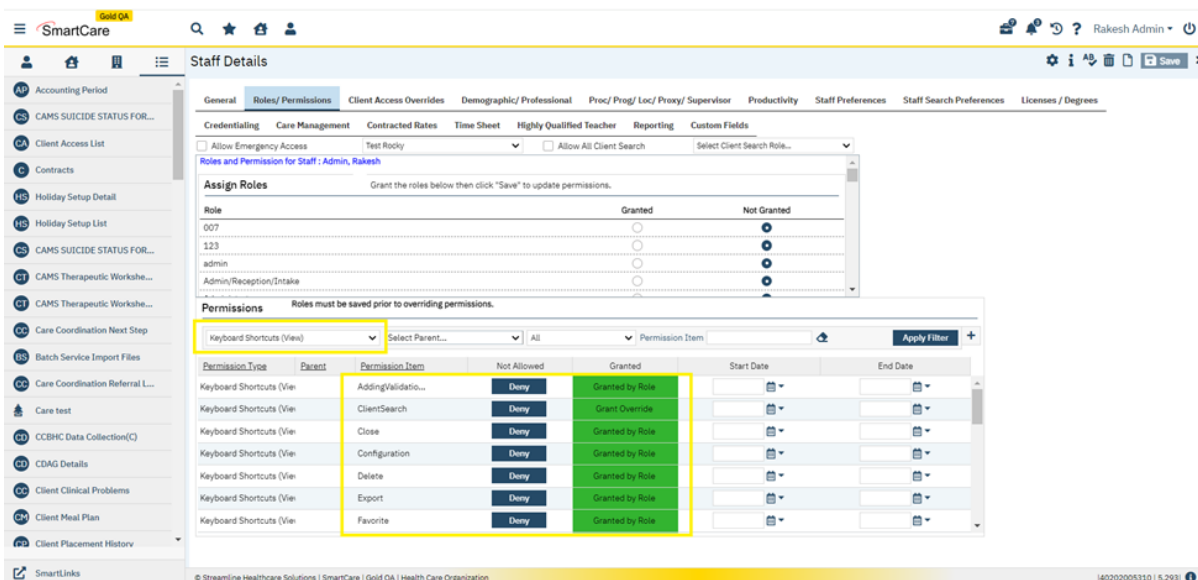
Navigation Path 2: Click on User Account menu dropdown -- Select 'Keyboard Shortcuts'.

Functionality 'Before' and 'After' release:

Purpose: To ensure that only permissioned staff have access to Keyboard Shortcuts to make change/alter in the SmartCare system needed, while other staff/users do not.

With this release, the Permissions to the Keyboard Shortcuts keys have been implemented to the below listed keys. Only permitted users will be able to view the required Keyboard Shortcuts in the User Account Menu.

1. Adding Validations
2. Client Search
3. Close
4. Configuration
5. Delete
6. Export
7. Favorite
8. GoTo
9. Help
10. Hover Help
11. Information
12. Label Change
13. New
14. New Favorite
15. OpenKeyboardShortCuts
16. Open Skip Links
17. Permissions Fields
18. Print
19. Save
20. Search
21. Side Navigation
22. Sign
23. SmartView
24. Tab Permissions
25. Validate
26. View Report



Staff Details

Roles/Permissions

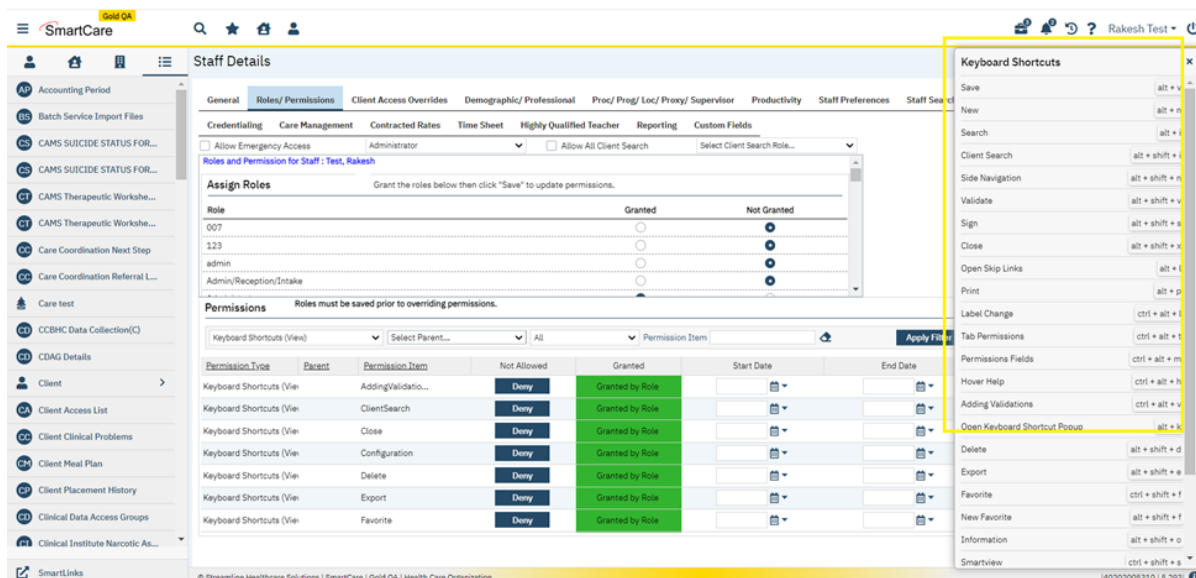
Grant the roles below then click "Save" to update permissions.

Role	Granted	Not Granted
007	<input type="radio"/>	<input checked="" type="radio"/>
123	<input type="radio"/>	<input checked="" type="radio"/>
admin	<input type="radio"/>	<input checked="" type="radio"/>
Admin/Reception/Intake	<input type="radio"/>	<input checked="" type="radio"/>

Permissions Roles must be saved prior to overriding permissions.

Permission Type	Parent	Permission Item	Not Allowed	Granted	Start Date	End Date
Keyboard Shortcuts (View)	Select Parent...	All	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Keyboard Shortcuts (View)		AddingValidation...	Deny	Granted by Role		
Keyboard Shortcuts (View)		ClientSearch	Deny	Grant Override		
Keyboard Shortcuts (View)		Close	Deny	Granted by Role		
Keyboard Shortcuts (View)		Configuration	Deny	Granted by Role		
Keyboard Shortcuts (View)		Delete	Deny	Granted by Role		
Keyboard Shortcuts (View)		Export	Deny	Granted by Role		
Keyboard Shortcuts (View)		Favorite	Deny	Granted by Role		

For those shortcut keys, if permission is granted, it will be reflected on the Keyboard Shortcuts of the User Account and if the permission is denied, it will be hidden in this screen.



Note: Permissions to the Keyboard Shortcuts keys are not applicable for the 'System Keyboard Shortcut Configuration' screen.

Author: Rakesh Naganagoda

139. Core Bugs # 127991: New Password Expiring Right After Being Set.

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

Navigation Path: SmartCare Login Page -- Reset the password by clicking on "Forgot your Password?" link -- After reset re-login with new password.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The user had reset the password using "Forgot your Password?" link on the login screen. After re-login with the new password, the user has received the below warning message.

Message: "Your Password is expired. Please create a new password"

With this release, the above-mentioned issues have been resolved. Now, the user can reset the password and re-login with the new password without any warning message.

Author: Kiran Tigarimath

140. EII # 126660: Json.js Preventing WalkMe Editor Functions.

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

Navigation Path: 'Login' -- 'Click on Walkme Icon'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user tried to click on play button in Walkme Editor in SmartCare application, the below-mentioned message was displayed.

Error Message: "Cannot read properties of undefined (reading 'turnOnWithLazyValidations')"

With this release, the above-mentioned issue is resolved. Now, the user is able to click play button in Walkme Editor without any message being displayed in SmartCare application.

Author: Akshay Vishwanath

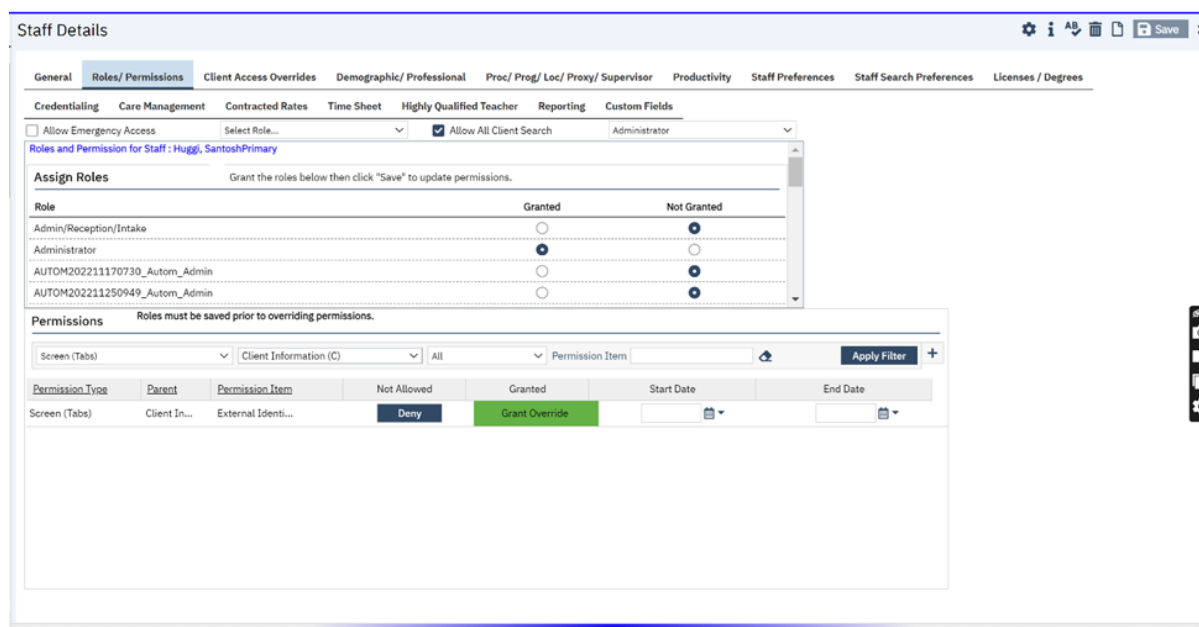
141. EII # 126687: Implementing 'External Identification' Tab in Client Information(C) screen and "External ID" search field on Client Search pop up.

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

Prerequisite: To enable External Identification Tab in Client Information c screen and "External ID" search field on Client Search pop up under the section "Other Search Strategies" section, the user has to provide the permission in Staff Details screen through the below **paths**:

Path 1: 'Go search' -- select required staff -- 'Staff details' -- 'Roles and permission' Tab -- Permission type 'Screen (Tabs)' -- Permission item 'External Identification'.

Path 2: 'Go search' -- select required staff -- 'Staff details' -- 'Roles and permission' Tab -- Permission type 'Client information Tabs' -- Permission item 'External Identification'.



Staff Details

General Roles/Permissions Client Access Overrides Demographic/ Professional Proc/ Prog/ Loc/ Proxy/ Supervisor Productivity Staff Preferences Staff Search Preferences Licenses / Degrees

Credentialing Care Management Contracted Rates Time Sheet Highly Qualified Teacher Reporting Custom Fields

☐ Allow Emergency Access Select Role... ☒ Allow All Client Search Administrator

Roles and Permission for Staff : Huggi, SantoshPrimary

Assign Roles Grant the roles below then click "Save" to update permissions.

Role	Granted	Not Granted
Admin/Reception/Intake	<input type="radio"/>	<input type="radio"/>
Administrator	<input type="radio"/>	<input type="radio"/>
AUTOM202211170730_Autom_Admin	<input type="radio"/>	<input type="radio"/>
AUTOM202211250949_Autom_Admin	<input type="radio"/>	<input type="radio"/>

Permissions Roles must be saved prior to overriding permissions.

Screen (Tabs) Client Information (C) All Permission Item Apply Filter +

Permission Type	Parent	Permission Item	Not Allowed	Granted	Start Date	End Date
Screen (Tabs)	Client In...	External Identi...	Deny	Grant Override		

Navigation Path 1: 'Client' -- 'Client information (c)' -- "External Identification" tab.

Navigation Path 2: Login to SmartCare -- 'Client search popup'.

Functionality 'Before' and 'After' release:

Purpose: Ability to document a client's alphanumeric external ID and search on the field in Client Search.

With this release, the below mentioned points are implemented:

- "External Identification" tab in Client Information (C) screen.
- "External ID" search field on Client Search pop up under the section "Other Search Strategies".
- New global code category '**EXTERNALIDTYPE**' has been added.

External Identifications Tab:

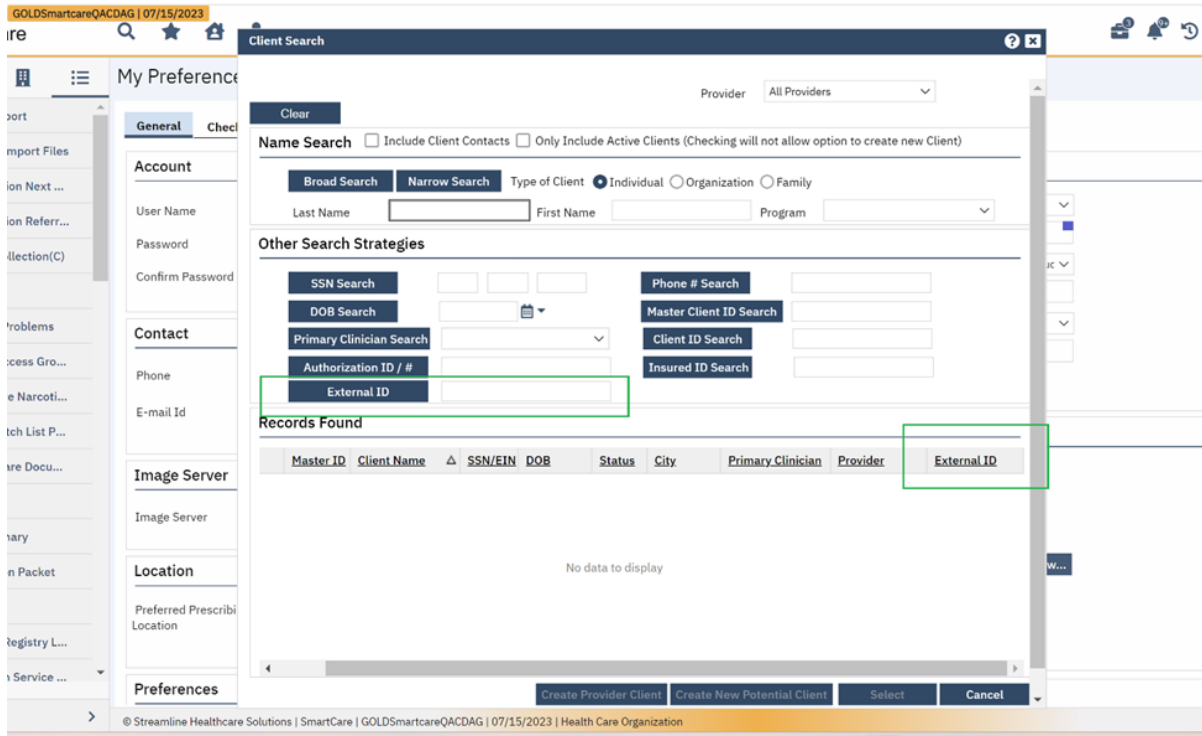
The screenshot displays the 'Client Information (C)' screen with the 'External Identifications' tab selected. The tab is highlighted with a green box. The screen shows a form for adding a new external identification with fields for Type, ID #, Start date, End date, and Comments. Below the form is a table titled 'List of External Identifications' which is currently empty, showing 'No data to display'.

Type	ID#	Date Range	Comment
No data to display			

External Identifications section:

- **Type** (Dropdown): This field binds values from Global Code Category '**EXTERNALIDTYPE**'. This is a required field. When there is no value, on click of Insert a validation message will be displayed.
- **ID #**: This is a Text box: This is a required field. When there is no value, on click of Insert a validation message will be displayed.
- **'Start Date'**: This is a Date control field. This is a required field. When there is no value, on click of Insert a validation message will be displayed.
- **'End Date'**: This is a Date control field.
- **Comment**: This is a text area field.
- **Insert Button**: On Click the values will be inserted into Grid.
- **Clear Button**: On Click the entered values will be cleared.
- **List of External Identifications Grid**: This Grid has columns Type, ID#, Date Range and Comment.
 - Under the "Date Range" column, both the Start Date and the End Date will be displayed in the format "Start Date - End Date". If no end date is inserted, then only the start date will be displayed.

Client search Popup:



- **"External ID" search field:** This is a Button with a Text Box.
- **Records Found grid:** A new column External ID has been added.
 - If a client has multiple external IDs, they will be displayed each separated by a comma and truncated.
 - When hovered over, all the external IDs will be displayed.

Data Model Changes:

- New table **ClientExternalIdentifications** is added.
- New column **ExternalId** is added in ClientSearchAudits table.

Staff Calendar

Reference No	Task No	Description
142	Core Bugs # 128046	The font color is White in Staff Calendar.

Author: Aishwarya Bommaklar

142. Core Bugs # 128046: The font colour is White in Staff Calendar.

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

Navigation Path: My Office -- Staff Calendar -- Click on Staff Calendar -- Select 'New Resource Entry' radio button in Scheduler Event popup -- Enter the required fields and Click on OK button -- Click on Monthly View.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Staff Calendar, when the user tried to view the Resource entries in the Monthly View, the font colour was in White and not readable.

With this release, the above-mentioned issue has been resolved. Now, the font colour is changed to Black and clear to read.

Staff/Users

Reference No	Task No	Description
143	Core Bugs # 127782	Staff Details screen: In 'Demographic/ Professional' tab, the Race and Language dropdowns do nothing when clicked.

Author: Niroop Hassan

143. Core Bugs # 127782: Staff Details screen: In 'Demographic/ Professional' tab, the Race and Language dropdowns do nothing when clicked.

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

Navigation Path: 'Administration' -- 'Staff/Users' -- 'Staff/Users' list page -- Click on required staff name hyperlink -- 'Staff Details' page -- Click on 'Demographic/Professional' tab -- Click on 'Race' dropdown -- Click on 'Language' dropdown.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the 'Demographic/ Professional' tab of the Staff Details Screen, when the user clicked on 'Race' and 'Language' dropdown nothing happened and the values were not able to be accessed.

With this release, the above-mentioned issue has been resolved. Now, in the 'Demographic/ Professional' tab of the Staff Details Screen, the user is able to access the values in 'Race' and 'Language' dropdown.

TEDS Tracking list

Reference No	Task No	Description
144	Core Bugs # 128045	The 'TEDS episodes' are neither generated nor appeared on the 'TEDS Tracking List' page upon assigning the program to the client.

Author: Dinesh Ponnuswamy

144. Core Bugs # 128045: The 'TEDS episodes' are neither generated nor appeared on the 'TEDS Tracking List' page upon assigning the program to the client.

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

Navigation Path 1: Login to 'SmartCare' Application -- 'TEDS Setup' List.

Navigation Path 2: Login to 'SmartCare' Application -- 'Client' search – Program Assignments (Client).

Navigation Path 3: Login to 'SmartCare' Application -- 'TEDS Tracking List'.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'TEDS episodes' were neither generated nor appeared on the 'TEDS Tracking List' page, upon assigning the program to the client.

With this release, the issue mentioned above has been resolved. A logic within 'TEDS Episodes' has been modified to ensure that 'TEDS episodes' are now created and displayed in the 'TEDS Tracking List' page, upon assigning the program to the client.

Whiteboard

Reference No	Task No	Description
145	Core Bugs # 127965	Flowsheet: Error displayed on saving the data and closing the screen.
146	Core Bugs # 128022	Whiteboard not saving.

Author: Niroop Hassan

145. Core Bugs # 127965: Flowsheet: Error displayed on saving the data and closing the screen.

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

Prerequisite: Select the 'Health Data Element' which has the dropdown type value as 'T'.

Navigation Path: 'Client' -- 'Flow Sheet' -- 'Flow Sheet' page -- Select the required flow sheet value which has the 'Health Data Element' of 'T' type dropdown value and click on 'New' icon -- Enter/Select required data and click on 'Save' icon -- Click on 'Close' icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. When the user saved and closed the flow sheet data, the below red error was shown.

Red Error: 8114*****Error converting data type varchar to float.*****ssp_GetClientHealthData*****440*****16*****5

With this release, the above-mentioned issue has been resolved. Now, the user can save and close the flow sheet data without getting any error.

Author: Shivakanth Moger

146. Core Bugs # 128022: Whiteboard not saving.

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

Navigation Path: Go search -- Whiteboard-Click on Precautions icon -- Precaution pop-up -- Enter and save the details.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When staff attempted to update Precautions on the whiteboard screen, the entered information disappeared immediately after typing and was not able to save the information.

With this release, the above-mentioned issue has been resolved. Now, when staff attempt to update Precautions on the whiteboard screen, the entered information is retained and is able to save, when the save button is clicked.

Widgets

Reference No	Task No	Description
147	Core Bugs # 127932	Tracking Widget timing out.
148	Core Bugs # 127935	Getting error while loading the 'Document To Do' widget
149	Core Bugs # 127892	Lab Result Widget: The 'Staff selection' search field did not retain the staff name entered by the user.

Author: Girish Jayanna

147. Core Bugs # 127932: Tracking Widget timing out.

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

Navigation Path: Dashboard -- Tracking Widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the Tracking Widget filtered with AssignedTo, it displayed a Timeout expired error message. This was because the stored procedure was executing even though the AssignedTo staff did not have any client notes to display, which had an impact on performance.

With this release, the stored procedure is modified. Now, the error message is not displayed when the user filters with AssignedTo, who has no client notes to display.

Author: Abhishek Naik

148. Core Bugs # 127935: Getting error while loading the 'Document To Do' widget.

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

Navigation Path: My Office -- 'Dashboard' -- 'Document To Do' widget.

Functionality 'Before' and 'After' release:

Before the release, here was the behaviour. In the 'Document To Do' widget, 'Error while loading widget' message was displayed when the effective date for the document was null.

With this release, the above-mentioned issue has been resolved. Now, the error message is not displayed while loading the 'Document To Do' widget. Also, an empty space will be displayed in the widget if the effective date of the document is null.

Author: Rakesh Naganagoda

149. Core Bugs # 127892: Lab Result Widget: The 'Staff selection' search field did not retain the staff name entered by the user.

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

Navigation Path: Login to 'SmartCare' application -- 'My Office' -- 'Dashboard' screen -- 'Lab Result' Widget.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The 'Staff selection' search field did not retain the staff name entered by the user, when the user clicked on the 'Refresh' button in the 'Lab Result' widget.

With this release, the above-mentioned issues have been resolved. Now, the 'Staff selection' search field retains the staff name entered by the user, when the user clicks on the 'Refresh' button in the 'Lab Result' widget.

Glossary of System Configuration Keys, Global Codes, Recodes, Data Model Changes.

System Configuration Keys

[12. EvaluateServiceForNonBillableLocationBillingRule](#)

[25. DisplayCDAGSectionInStaffDetails](#)

[25. EnableClinicalDataAccessGrouping](#)

[43. DisplayCDAGSectionInStaffDetails](#)

[43. EnableClinicalDataAccessGrouping](#)
[44. DisplayCDAGSectionInStaffDetails](#)
[44. EnableClinicalDataAccessGrouping](#)
[45. DisplayCDAGSectionInStaffDetails](#)
[45. EnableClinicalDataAccessGrouping](#)
[46. DisplayCDAGSectionInStaffDetails](#)
[46. EnableClinicalDataAccessGrouping](#)
[47. DisplayCDAGSectionInStaffDetails](#)
[47. EnableClinicalDataAccessGrouping](#)
[49. DisplayStaffAsTypeableSearchTextBox](#)
[54. ApplyStaffAccessRule](#)
[58. DisplayCDAGSectionInStaffDetails](#)
[58. EnableClinicalDataAccessGrouping](#)
[58. DisplayPullProblemListsButtonAndPushProblemListsCheckboxOnCoreDxDoc](#)
[71. DisplayCDAGSectionInStaffDetails](#)
[71. EnableClinicalDataAccessGrouping](#)
[80. SetMinutesPriorToWhichCheckInIsEnabled](#)
[84. MARAutoScheduleDays](#)
[99. ShowNotificationPollingInterval](#)
[101. GLTrackAndReportUnappliedPayments](#)
[106. ConsiderProgramsAssociatedToProcedureCodeForBundledService](#)
[118. TurnOnRoleBasedRxPermissionsInSmartCare](#)
[121. SetSmartCareMobileApplicationURL](#)
[121. EnableSAMLIntegration](#)
[128. NumberOfDaysRecurringServicesSchedule](#)
[131. DisplayStaffAsTypeableSearchTextBox](#)
[134. ShowPlanSectionBelowOtherNotesSectionInCorePsychNotePDF](#)

Global Codes

[13. ChargeClaimsAction](#)
[102. PAYMENTMETHOD](#)
[104. EMCOMPLEXITYPROBLEM](#)

[120. DEGREE](#)

[127. AutoAddOnCodeLogic](#)

[141. EXTERNALIDTYPE](#)

Recodes

[40. LABTYPEEXTERNAL](#)

[48. SetStaffGrantAccessToRestrictedClient](#)

[93. ExcludeTestClientsFromFQHCUDSReports](#)

[95. SetOutOfNetworkCoveragePlan](#)

[102. SetPaymentMethodForDuplicateCheckValidation](#)

[104. SetProblemEndDateFromComplexity](#)

Data Model Changes

[37. 'ClientMedicationId' and 'OrderMedicationIdList' columns are added to the Table 'ClientOrdersInteractionDetails'.](#)

[40. 'ClientOrderObservationDocuments' Table is added.](#)

[48. The 'ClientAccessAllStaffDenials', 'ClientAccessAllStaffDenialAccessRequests', 'ClientAccessAllStaffDenialStaffOverrides' and 'ClientAccessAllStaffDenialRoleOverrides' Tables are added.](#)

[56. 'LaboratoryType', 'LabTypeInternal', 'LabTypeExternal', 'LabTypeInternalXDays', 'LabTypeExternalXDays' and 'AllLabsXDays' columns are added to the Table 'DocumentCodes'.](#)

[60. 'ConsentToParticipateComment' and 'TreatmentOfferedRefusalComment' columns to the Table 'DocumentConsents'.](#)

[85. 'AcknowledgedSafetyDose' column is added to the Table 'MATManagementDetails'.](#)

[86. New columns 'MATToxicologyScreen' and 'MATThresholdDosage' are added to the Table 'Orders'.](#)

[130. 'ClientSignatureDateTime' column added to the Table 'ServiceEncounterForms'](#)

[141. New table 'ClientExternalIdentifications' is added and new column 'ExternalId' is added to the Table 'ClientSearchAudits'.](#)