RELEASE NOTES: 08/19/2024
Monthly Service Pack – SC.CORE.6.0_1.24.000.2407.016

Executive Summary:

1. SUD checkbox is added to the Existing API Consent Document (Built under EII 2767) for selection of whether SUD data should be shared in the sharing of data in electronic interface exchanges. **(EII #123837).**

2. This is to add SUD field in Order Details, Program Details, Plan Details, Inquiry Details, Billing Code Details and Authorization Code Details screens. This checking/ unchecking will determine whether SUD data should be shared while the sharing of data in electronic interface exchanges. **(EII # 125498 & EII # 125502 & EII # 125499 & EII # 125501)**

3. the functionality of 'OB/GYN Flowsheet' tag in Medical Progress Note has been updated to view today (current) and the "last visit" data entered in the client's OB/GYN flow sheet data. **(EII # 126678)**

4. The Organization Boards, Grants and other State items require some documents to be completed at time of Service. So implementing a feature where Staff can indicate required documents for specific procedure/Services is required for the process. **(EII # 127198)**

5. Implementation of a 'School Liaison Contact Note' Service Note to track the number of interactions with each contact listed. **(EII # 125457)**

6. Implementation of MCO Site tab in Program Details screen is done to create a Site record and Map the provider with site from Program screen. **(EII # 127548)**

7. HAM-D (Hamilton Depression Rating Scale) assessment document has been implemented. **(EII # 128031)**

8. Implemented adjudication Contract Rate Logic, based on the staff degree and rendering provider License. **(EII # 124322)**

9. A new 'Contracts Details' screen has been implemented that allows the same contract to be linked to multiple providers. When a contract rate is updated then the rates can be used by all providers which are linked to the shared/master contract. Based on the Status of the shared contract, it will be used in the claim line adjudication process. **(EII # 127549)**

10. A new 'E-mail' textbox field has been implemented under the 'Release To/Release From' section in the 'Release of Information' document to communicate through secure email id. **(EII # 128048)**

11. Implementation of the 'Shift Notes' document is done to take brief notes about an interaction with the patient. **(EII #127338)**

12. A new section 'Preferred Method of Delivery' is implemented in the 'Release of Information' document. This section will identify how the information should be delivered to the requestor. **(EII # 128194)**

13. The Customers currently do not have the flexibility to turn on /off existing validations in the Core Inquiry screen. With the Implementation of 'Detail Screen Validation List Page, the customer will be able to activate/deactivate Inquiry detail screen validations. **(EII #127413)**

14. Ability to place a manual hold or a configurable auto hold when a patient misses n number of days on the MAT (Medication Assisted Treatment) page. **(EII # 124896)**

15. The Staff Dropdowns are changed to 'Typeable search box' based on the System Configuration Key **'DisplayStaffAsTypeableSearchTextBox'**:

- The 'Staff' dropdown is changed to a 'Typeable search box' for Batch Service Entry (Multi-Service Entry), Grievances List & Supervision Level Detail screens to improve the System performance. (EII # 126617)

- The 'Staff' dropdown is changed to a 'Typeable search box' for the 'Order' related screens to improve the System performance. (EII # 128211)

- The 'Staff' dropdown is changed to a 'Typeable search box' for the 'Document', 'Events' and Service Note screens to improve the System performance. (EII # 127596)

- The 'Prescriber' dropdown is changed to a 'Typeable search box' in the 'Patient Summary' and 'View Medication History' screens in the Rx Application to improve the System performance. (EII # 128121 & EII #128123)

- The "Author" drop down is changed to 'Typeable search' text box for the 'Document', 'Events' and Service Note screens to improve the System performance. (EII #126616)
- The 'Prescriber' Dropdown to Type-able Search Textbox in New medication, Re-Order Medication and Change Order Medication Screen to improve the System performance. (EII #128122)

- The Staff dropdown is modified to typeable search textbox in Team Scheduling Details screen to improve the system performance. (EII # 128424)

- The Staff dropdown is modified to typeable search textbox in Tracking widgets to improve the system performance when there large number of Staff. (EII # 128494)

- The 'Primary Care Coordinator' and 'Medical Provider' dropdown fields are changed to Typeable search textbox fields in Registration Document © and Client information (Admin) documents to improve the system performance when there large number of Staff. (EII # 128331 & EII #128332))

- The Staff drop-down is changed to typeable search field in the 'Primary Care Visit' pop-up' of Reception Screen, Arrival Details screen and Client Inpatient Visit Details screen to improve the system performance when there large number of Staff. (EII #127116)

- A typeable search text box is added to display staff on the Authorization list and Authorization Detail page to improve the system performance when there large number of Staff. (EII # 128227)

- The changes are done to the 'Clinician' and 'Prescriber' dropdown fields to 'Typeable search textbox fields' in the 'Client Lists/Reminders' screen to improve the system performance when there large number of Staff. (EII #128347)

- The 'Intake Staff' dropdown fields are changed to Typeable search textbox fields in Client Information (C) document to improve the system performance when there large number of Staff. (EII # 128333)

Abbreviation: EII - Engineering Improvement Initiatives

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1	EII # 127447	Charge Status not changing when denial 835 is posted.	835 File
5	EII # 127746	Clients Receiving 2 Voice Reminders at the Same Time.	Appointment Notifications
6	EII # 127508	Changes in the 'Arrivals' list page and 'Arrival Details' page.	Arrivals
21	EII # 127966	Changes in the MAT tab of the 'Client Information Screen'.	Client Information(C)
25	EII # 128211	Implementation of Typeable Search box in Orders	Client Orders
33	EII # 128143	Implemented the 'Typeable Search Text Box' Item Type for the DFA Forms.	DFA
37	EII # 125724	To improve the performance of the Disclosure Detail page when the user clicks on "View/Print Disclosed Items" button.	Disclosures/Requests
38	EII # 127596	Modify the Staff dropdown fields to Typeable Search textbox in the Document, Events and Service Note screen.	Documents
43	EII # 125503	Implementation to add SUD Check box in Document Signature Control.	Documents
48	EII # 127569	Implementation of document packets for the Programs in 'Registration' document.	Documents
49	EII # 128031	Implemented the HAM-D Assessment Document.	Documents
51	EII # 128048	Implementation of the 'E-Mail' field in the 'Release of Information' Document.	Documents
52	EII # 127313	Added these Columns 'Sum20Ratings', 'AverageDLA', 'EstimateGAF' , 'SeverityIndex' 'ChangeScore' and 'SeverityOfIllness' to the DocumentDailyLivingActivity20Scores table.	Documents
53	EII # 127338	Implementation of the 'Shift Notes' document.	Documents
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61	EII # 127345	Changes to the Treatment Team screens.	Documents
71	EII # 123837	Added SUD checkbox in Health Data Elements -Creating Vitals/Labs	Health Data Elements
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74	EII # 127413	Implementation of 'Detail Screen Validation List Page'.	Inquiries
75	EII # 127083	Core Inquiry: ability to configure validations	Inquiries
76	EII # 126613	Changes in the 'Initial' tab of the 'Inquiry Details' screen.	Inquiries
77	EII # 125501	Added a new 'SUD' check box in 'Inquiry Details' screen	Inquiries
83	EII # 128183	Implemented a logic on the staff detail screen when changes are made in the Staff's Role Permission /Client Access Overrides tab.	Manage Staff

84	EII # 125499	Added SUD check box in Billing Code Details and Authorization Code Details screen	MCO
85	EII # 124322	MCO Adjudication Contract Rate Logic: Contract rate to check the 'Rendering provider's' Staff Degree matches with the contract rate license.	MCO
89	EII # 127550	Initializing the diagnoses from claims to service in the 'Service from Claims process'.	MCO
91	EII # 124896	Implemented a MAT Holds List and MAT Holds detail page for adding manual hold and releasing both auto and manual hold.	Methadone
92	EII # 127881	Ability to display Service entries in different colors on My Calendar screen.	My Calendar
95	EII # 127140	Updating 'CURRENT MEDICATIONS' section with two new columns in the 'FaceSheet' Report.	My Reports
98	EII # 125498	Add SUD checkbox in Order Details.	Orders
99	EII # 126897	Order Details: Global Code Category dropdown is changed to searchable textbox.	Orders
106	EII # 128123	Prescriber dropdown field is modified to Typable Search in the view Medication History Screen in Rx Application.	Performance and Scalability Improvements
107	EII # 126617	Staff dropdown typeable search textbox - Batch Service Entry (Multi-Service Entry), Grievances List Screen & Supervision Level Detail.	Performance and Scalability Improvements
109	EII # 128121	To Convert Rx–'Prescriber' Dropdown to Type-able Search Textbox".	Performance and Scalability Improvements
111	EII # 128424	Team Scheduling Details: Staff dropdown is modified to typeable search textbox.	Performance and Scalability Improvements
112	EII # 128331	Registration Document (C): Modify the 'Primary Care Coordinator' and 'Medical Provider' dropdown fields to Typeable search textbox fields.	Performance and Scalability Improvements
113	EII # 128332	Client Information (Admin): Modify the 'Primary Clinician', 'Primary Physician' and 'Intake Staff' dropdown fields to Type-able search textbox fields.	Performance and Scalability Improvements
115	EII # 128227	Authorizations: A typeable search text box is added to display staff on the Authorization list and Authorization Detail page.	Performance and Scalability Improvements
116	EII # 128311	Implemented 'ApplyStaffAccessRule' to Staff list in Grievances Details.	Performance and Scalability Improvements
117	EII # 128347	Changes for the 'Clinician' and 'Prescriber' dropdown fields to 'Typeable search textbox fields' in the 'Client Lists/Reminders' screen.	Performance and Scalability Improvements
118	EII # 128333	Client Information (C): Modify the 'Intake Staff' dropdown fields to Typeable search textbox fields.	Performance and Scalability Improvements
120	EII # 125502	Add SUD Checkbox in Program Details and Plan Details.	Plans
121	EII # 126678	Primary Care: need "view previous data" option for ob/gyn flow sheet data.	Primary Care

124	EII # 127999	Changes to the Procedure Code Details screen.	Procedure/Rates
127	EII # 128074	Associate documents within Procedure Code and display those documents on the Service Note.	Procedure/Rates
129	EII # 125504	To Add a column 'SUD' in the table 'MDMedicationNames'.	Rx Application
131	EII # 128122	To Convert 'Prescriber' Dropdown to Type-able Search Textbox in New medication, Re-Order Medication and Change Order Medication Screen.	Rx Application
132	EII # 126812	Rx Application – On clicking the 'INSPECT (PMP)' button, the user gets an Error Message in multiple Message tags.	Rx Application
140	EII # 127198	Associate Documents added to Service Notes.	Services /Notes
144	EII # 125457	Implementation of a 'School Liaison Contact Note' Service Note.	Services /Notes
145	EII # 127560	Service Note: Added "List of Services that can be added to use the Same Note' in the 'Other Services using the same Note' pop up.	Services /Notes
146	EII # 126887	Service Note creation validation.	Services /Notes
147	EII # 126305	Implemented a new logic for the 'Reviewed PMP Report' checkbox in the 'Medical Decision-Making' tab of 'Psychiatric Note'.	Services /Notes
151	EII # 127536	To retrieve System Distributed cache cluster DataStore value instead of systemConfigurationKey table.	SmartCare Improvements
154	EII # 127318	Added Program field in Staff Calendar and Appointment Search List Page.	Staff Calendar
158	EII # 128494	Typable Search box for Staff in Tracking Widget.	Widgets

TASKS SUMMARY – 'NEW FUNCTIONALITY' RELATED (5)

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69	EII # 127432	Group Details and Group Service Details :Mask Client names for Staffs who do not have access to them.	Group Services
86	EII # 127548	Implementation of MCO Site tab in Program Details screen.	MCO
87	EII # 127549	Implementation of Provider Contracts Templates	MCO
155	EII # 127116	Implementation of a 'Staff Access Rule' & Staff drop-down as a typeable search.	Staff/Users

TASKS SUMMARY – 'DEFECT FIXES' (97)

Sl. No	Task No	Summary	Module Name
2	Core Bugs # 128474	837P Other Insured Subscriber Insured Address is not displayed.	837 File

3	Core Bugs # 128525	Typeable Search added for Staff in Activity Timeline screen.	Activity Tracker
4	Core Bugs # 127181	Appointment Reminder Utility - Timeout issue.	Appointment Notifications
7	Core Bugs # 128913	Excessive number of errors logged in the Error Log table.	Error Log
8	Core Bugs # 128432	Unable to open the Authorizations (My Office) page due to an error message.	Authorizations
9	Core Bugs # 128436	Performance issue in the ssp_SCListPageAuthorizations.	Authorizations
10	Core Bugs # 127992	Getting an error when trying to create a service in between the program enrolled and discharged dates through the Batch Service Import Files screen.	Batch Service Entry
11	Core Bugs #128737	Client Information popup showing wrong data.	Bedboard
12	Core Bugs # 128506	Case Rate:The case rate services were duplicated.	Charges/Claims
13	Core Bugs # 128647	The time for the dates of services is not displayed in the exported Excel file.	Charges/Claims
14	Core Bugs # 128336	The custom hook is missing in ssp_PMClaims837UpdateBundleInfoInstitutional for the ‘LSBC episode key’ on the ‘Program Details’ screen.	Charges/Claims
15	Core Bugs # 128568	Error is displaying when trying to generate a claim.	Charges/Claims
16	Core Bugs # 128585	Adding logic to check CoveragePlanRule Template Plan in ssp_PMClaims837Validations.	Charges/Claims
17	Core Bugs # 126395	The CMS 1500 paper claims were not pulling values for box number 32b and 33b which were configured in claim format configuration details screen.	Charges/Claims
18	Core Bugs # 128494	The added 'Education Resources' is not displayed on the 'Education Resources' (Client) screen.	Client Education Resources
19	Core Bugs # 128594	Client Fee: Filter not working as expected.	Client Fee
20	Core Bugs # 128735	Massive Errorlog count increase in the Errorlog table.	Client Information(C)
22	Core Bugs # 128644	Client Information(C): Data is clearing out in the Demographics tab for a few fields.	Client Information(C)
23	Core Bugs # 128596	After inserting ‘Order Set’ In the Quick order screen on saving, Frequency is getting cleared.	Client Orders
24	Core Bugs # 128548	Jumbled data is displayed in the Client Order PDF.	Client Orders
26	Core Bugs # 128604	Client Orders: Unable to view full order ‘Comments’ and ‘Instruction Text’ without editing the order.	Client Orders
27	Core Bugs # 128569	Client Order: The most Recent "Reviewed By" information was not displaying correctly.	Client Orders
28	Core Bugs # 128408	The Provider Name hyperlink is not directing to the appropriate Client Information Screen associated to other client records.	Client Search
29	Core Bugs # 127491	Client Summary: Diagnosis document’s ICD codes is not updating.	Client Summary
30	Core Bugs # 128531	ProgramId column was not updating based on the ClientProgramID column in the Documents table.	Client Summary
31	Core Bugs # 128619	'Messages' screen: 'Client Access Request' hyperlink is removed from Reference column.	Compliance Core

32	Core Bugs # 128706	The "My Outgoing Referrals" widget is duplicated and appears twice in the dashboard.	Dashboard
34	Core Bugs # 128659	Fields on DFA Tabs Not Displaying After DFA Modification.	DFA
35	Core Bugs # 128699	Dropdown lists are not populating on forms.	DFA
36	Core Bugs # 128466	Disclosure/Request Details screen: when adding document name with forward slash ("/") is added to list of documents, it is not showing properly in the grid.	Disclosures/Requests
39	Core Bugs # 128244	Revert the "Risk and Protective Factors" tab changes with the previous version of the C-SSRS Assessments.	Documents
40	Core Bugs # 128486	Registration Document (C): Unable to create a second version.	Documents
42	Core Bugs # 128295	USCDI Summary of Care PDF is not pulling expected data.	Documents
44	Core Bugs # 128656	'IP Psychiatric Note' screen: A signed ICD code Diagnosis details were not initializing into 'Diagnosis' tab.	Documents
45	Core bugs # 128651	Error Message when signing NOMS.	Documents
46	Core bugs # 128702	'Release of Information' document: 'Release To/Release From' section fields are not initializing from 'Contacts' tab of 'Client Information C' screen.	Documents
47	Core bugs # 128552	Error message is displayed while opening the in-progress Care Plan.	Documents
50	Core bugs # 126872	Documents: PDF is not generated.	Documents
55	Core bugs # 127484	Documents: Additional Version creating on clicking Multiple Times on sign button	Documents
56	Core bugs # 128629	Care Plan: The duplicate 'Interventions' in the 'Intervention' tab when the user created new plans.	Documents
57	Core bugs # 128648	History and Physical tab bug	Documents
58	Core bugs # 128528	Individual Service Plan: Error message is displayed when accessing the screen.	Documents
59	Core bugs # 128598	National Outcome Measures (NOMs): Unable to insert Dx due to Error	Documents
62	Core Bugs # 128114	Electronic Eligibility Mapping Maintenance (Admin) screen is displayed with red error.	Electronic Eligibility
63	Core Bugs # 128406	'Email Configuration' screen: Incorrect password is displayed in the password field when the user modified and saved it.	Email Configuration
64	Core Bugs # 128527	CM Event Screen - Authorization Request: The code dropdown was not filtering by site.	Events
65	Core Bugs # 128559	Typable Search box - Life Event List and Detail page	Events
66	Core Bugs # 128368	Status Change Form Document: The 'Staff Providing service name' format is displayed in 'FirstName, LastName' instead of 'FirstName LastName' under the 'PDF'.	Foster Care
67	Core Bugs # 128512	Referrals: The Child Hyperlink redirected to the incorrect Screen.	Foster Care
68	Core Bugs # 128575	Correct client is not displayed in the 'Biological Family' popup.	Foster Care

70	Core Bugs # 128354	Performance issue in the Group service List page.	Group Services
73	Core Bugs # 128642	'Inquiry details' screen: User was unable to create a new inquiry due to error	Inquiries
78	Core Bugs # 128673	'Inquiry screen name is displayed too small.	Inquiries
79	Core Bugs # 128864	'Inquiry Details' screen: Incorrect State and Zip Warning message was displayed	Inquiries
80	Core Bugs # 128584	Issues in USCDI xml.	Interface
81	Core Bugs # 128304	Immunization Configuration Details: Immunization history details was sending in the form of HL7 message based on the selected individual location for a vendor.	Interface
82	Core Bugs # 128530	Clinisync ADT screen "Create Document".	Interface
88	Core Bugs # 128480	The provider contract name is incorrectly displayed in the 'Contract Name' filter on the 'Contract Rate Details' tab of the 'Contract Rates Details' screen.	MCO
90	Core Bugs # 128676	'Message Detail': The "Display As" name is not displaying for the 'To' dropdown search.	Messages
93	Core Bugs # 128657	Signature on Incident Report glitch.	My Reports
94	Core Bugs # 127614	Issue in Client Statement Address Format.	My Reports
96	Core Bugs # 128710	Notifications: Counts not reset to zero unless the Page Refreshed/Reset.	Notifications
97	Core Bugs # 128224	The 'Order Acknowledgement' is updating with 'Pending Release' as 'Y' by default when download compendium SQL Job processing weekly.	Orders
100	Core Bugs # 128106	QUEST is not able to process the Client Orders.	Orders
101	Core Bugs # 128488	The Deleted 'Scheduled Recurrent Services' in SmartCare are not removed from the 'Outlook Calendar'.	Outlook Sync
102	Core Bugs # 128592	Patient Portal - My Account icons for View Past Statements/Make Payment are reversed.	Patient Portal
103	Core Bugs # 126659	The payment was not distributed correctly for the charges and the leftover amount added to all the charges.	Payments/Adjustments
104	Core Bugs # 128373	Typeable Search Staff Dropdown - Payment/Adjustments.	Payments/Adjustments
105	Core Bugs # 128554	The user (name with length more than 15) not able to click on 'Assigned Date' link, even though the 'Reviewed By' is logged in staff.	Peer Record Review
108	Core Bugs # 128614	Performance issue in 'Patient Lists/Reminders' list page.	Performance and Scalability Improvements
110	Core Bugs # 128437	Performance issue while loading Inquiries List page.	Performance and Scalability Improvements
114	Core Bugs # 128730	'Client Summary' screen is taking more time to load the 'Timeline Summary' graph data.	Performance and Scalability Improvements
119	Core Bugs # 128728	Prevent users from entering "Per 0" as a configuration in billing codes/rates.	Plans
122	Core Bugs # 128493	'Program Requested' dropdown in the Approve tab is not initializing the values from Request tab.	Primary Care
123	Core Bugs # 128626	Allergy Popup was not reappearing after Closing Out.	Primary Care

125	Core Bugs # 128470	Type able Staff Search text box has been added under Procedure/Rates list page.	Procedure/Rates
126	Core Bugs # 128685	The decimal valus are not imported from Excel.	Procedure/Rates
128	Core Bugs # 128586	Wrong NDC code is sent to Surescripts when the medication is prescribed electronically.	Rx Application
130	Core Bugs # 128557	Refill allowed for schedule II.	Rx Application
133	Core Bugs # 128718	Issues with Allowing Special Characters in Client's First or Last Name.	Rx Application
134	Core Bugs # 128563	Individual services are changing the 'Start Time' on clicking the 'Save' button.	Services
135	Core Bugs # 128479	Service Detail – The 'Clinician' dropdown field displays all the 'Clinician Names' for those who don't have an 'Active License/Degree'.	Services
136	Core Bugs # 128582	The duration of the manually added add-on codes are automatically changed to the main service duration upon scheduling or completion.	Services
137	Core Bugs # 128476	Copy/Move/Error of claimed service did not automatically mark the charge as errored.	Services
138	Core Bugs # 128725	Service Detail: The end date field is not calculated based on the Procedure codes entered as values.	Services
139	Core Bugs # 128605	Popup message issue when creating Service Notes.	Services/Notes
141	Core Bugs # 128583	Vitals information is not populating into Psychiatric Note.	Services/Notes
142	Core Bugs # 128518	Diagnosis not pulling into Psych Notes with Signed Diagnosis Documents.	Services/Notes
143	Core Bugs # 128669	Services/Notes: The 'Narrative' section with slightly longer data was displayed on the next page leaving the first page mostly blank on the PDF.	Services/Notes
148	Core Bugs # 128588	Performance issues in the Dashboard widgets.	SmartCare Improvements
149	Core Bugs # 128567	Go Search taking more time to load the data.	SmartCare Improvements
150	Core Bugs # 128611	Detail Pages: Previously created record is loading on refreshing the screen.	SmartCare Improvements
152	Core Bugs # 128572	When SmartView is open the User Menu index is not displayed properly.	SmartCare Improvements
153	Core Bugs # 128664	The 'Current Balance' hyperlink in the 'Summary' widget of SmartView did not redirect users to the 'Client Account' screen when clicked.	SmartView
156	Core bugs # 128489	Cancelled Telehealth Service is not Updated in the Zoom calendar.	Telehealth
157	Core Bugs # 128621	Whiteboard: Execution Timeout.	Whiteboard
159	Core Bugs # 128499	Dashboard loading issue leads to the display of "Error while loading widgets" error.	Widgets

Functionality-wise Task Details:

835 File

Reference No	Task No	Description
1	EII # 127447	Charge Status not changing when denial 835 is posted.

Author: Namratha Nagaraj

1. EII # 127447: Charge Status not changing when denial 835 is posted.

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

Prerequisite: To set Configuration key 'AllowZeroDollarPaymentWhenPosting835' Value as 'Yes'.
Path: Administration' -- 'Configuration keys' -- Search -- "AllowZeroDollarPaymentWhenPosting835" Configuration key -- Set Value as 'Yes' -- Click on 'Save' button.

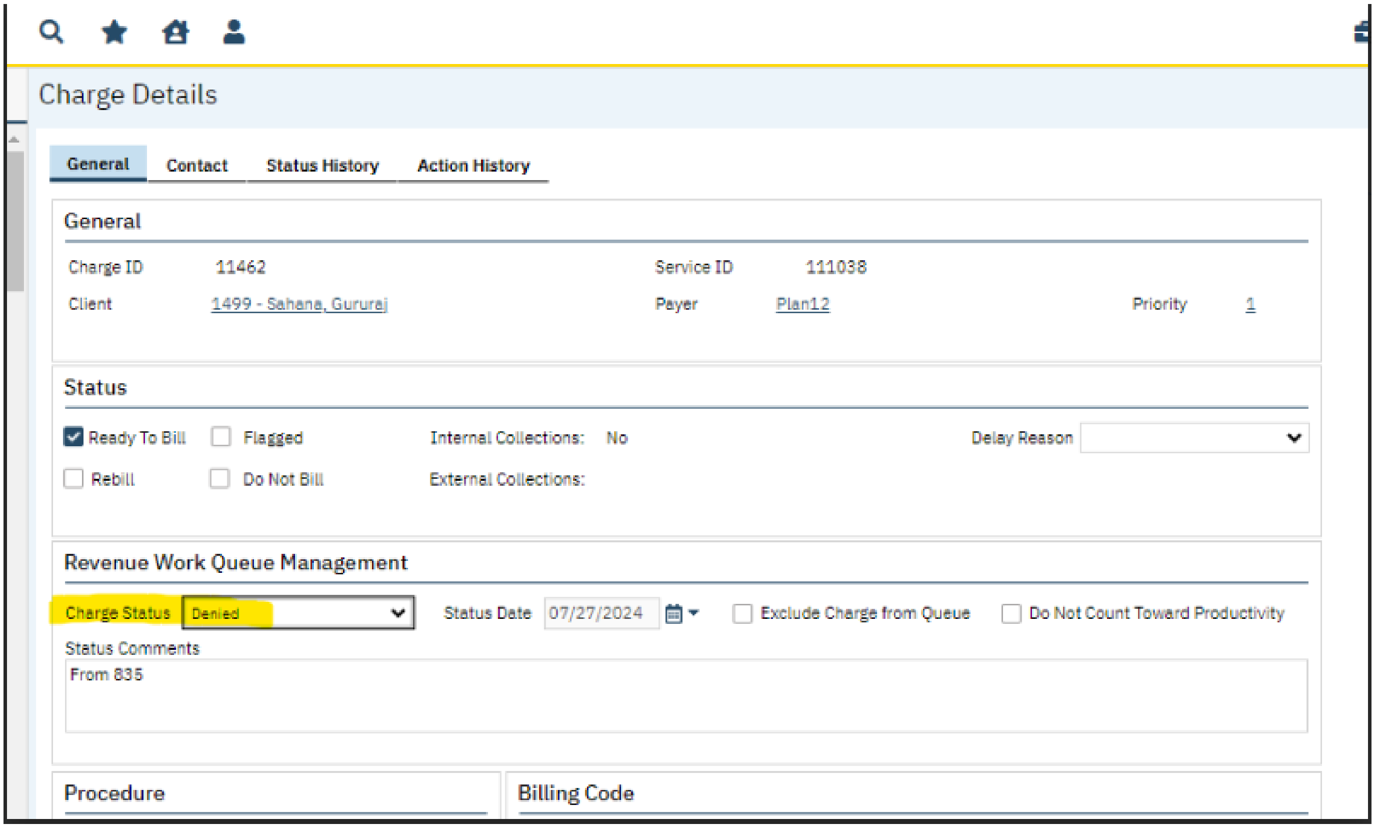
Navigation Path 1: 'My Office' --'Charges/Claims' -- Charges/Claims' list page will be opened --Click on 'DOS' hyperlink -- 'Service Detail' page will be opened -- Click on 'Charge' hyperlink -- 'Ledger Entries' page will be opened -- Click on 'Charge Id' hyperlink -- 'Charge Details' page will be opened.

Navigation Path 2: 'My Office' -- 'Payments/Adjustments' -- Click on 'Electronic Remittance' button -- Click on 'Import File ID' hyperlink -- Click on 'Process' button.

Functionality 'Before' and 'After' release:

Purpose: Denied status should be updated while processing 835 denial files.

With this release, the following implementation has been done. If zero payment has been posted, the Dropdown value of the charge status in the 'Revenue Work Queue Management section' will be updated as Denied.



837 File

Reference No	Task No	Description
2	Core Bugs # 128474	837P Other Insured Subscriber Insured Address is not displayed.

Author: Roopa Hemanna

2. Core Bugs # 128474: 837P Other Insured Subscriber Insured Address is not displayed.

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

Prerequisites: The standard Electronic Claim Format is 'HIPAA 837 Professional'.

Navigation Path: 'My Office' – 'Charges/Claims' list page – Select the Charges to be billed – click on 'E claim' button – Claims Processing pop up window – click on 'Process Now' button – click on 'Create Claim File' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 837 claim files, Other Insured address was not displayed in N3 and N4 segments of 837P Claims, as it was not developed.

With this release, the above-mentioned issue has been resolved. Now, the Other Insured address is implemented in the "Loop 2330A - Other Subscriber Name" of N3 and N4 segments in 837 P claims. The address details pull from the contact tab of Client Information screen, if the client is not the subscriber; otherwise, it pulls the client's address from the General Tab of Client information screen.

Activity Tracker

Reference No	Task No	Description
3	Core Bugs # 128525	Typeable Search added for Staff in Activity Timeline screen.

Author: Saravana Kumaar

3. Core Bugs # 128525: Typeable Search added for Staff in Activity Timeline screen.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' or 'No' by following the below **path:**

Administration - Configuration Keys – DisplayStaffAsTypeableSearchTextBox.

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the staff drop-downs will display typeable search text boxes instead of a drop-down.
- When the key value is set to "No", the staff drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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 behaviour, i.e., the same as the key value is "No".**

Navigation Path: Search Activity Timeline -- Select Activity Timeline (Client) -- All Staff.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The staff filter in the 'Activity Timeline' list page was displayed as a dropdown and this was impacting the performance of the application when there were a large number of staff records.

With this release, the above-mentioned issue has been resolved. Now, all staff dropdown in the 'Activity Timeline' list page is changed into a type-able text box, and this will be displayed if the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set to "Yes" and thereby improving the system performance.

Appointment Notifications

Reference No	Task No	Description
4	Core Bugs # 127181	Appointment Reminder Utility - Timeout issue.
5	EII # 127746	Clients Receiving 2 Voice Reminders at the Same Time.

Author: Manjunath Malipatil

4. Core Bugs # 127181: Appointment Reminder Utility - Timeout issue.

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

Prerequisites:

1.'Scheduled' services are created.

2.The 'Appointment Reminder Utility' SQL Job is executed.

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When there were bulk appointment reminders to be processed for sending the notifications to the client, the 'Appointment Reminder Utility' job resulted in a timeout error.

With this release, the above-mentioned issue has been resolved. Now, the timeout duration is extended (to 60 minutes) in the Appointment Reminder Utility Job to avoid Timeout error and successfully sending the appointment notifications to the clients via SMS & Voice.

Author: Manjunath Malipatil

5. EII # 127746: Clients Receiving 2 Voice Reminders at the Same Time.

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

Prerequisite:

1. Client communication: The preference for getting an appointment notification is a voice.

Path: Login to SmartCare Application -- Select a client -- Client Information -- Demographics tab -- Preference section -- Select voice check box for communication preference field -- select a phone number from the Communication Phone from the drop down – save.

2. A valid phone number to receive appointment notifications is added to the client's account.
Path: Login to SmartCare Application -- Select a client -- Client Information -- Phone Numbers section --Add Phone number to the client.

3. Scheduled service is created for a service.

Path: Login to SmartCare Application -- Select a client -- Services (Client)-- Click on New button -- In service details schedule a service.

4. Another Scheduled service is cancelled.

Path: Login to SmartCare Application -- Select a client -- Services (Client)-- select a service in future date which needs to be cancelled -- in Service Details screen update the status to cancel and provide the cancel reason – save**.**

Navigation Path: NA

Functionality 'Before' and 'After' Release:

Purpose: To ensure that the clients are not receiving 2 voice reminders (calls) at the same time.

Before the release, here was the behavior. When the Appointment Reminder Job ran at the scheduled time, the Appointment notifications (Voice) for scheduled and cancelled Services were sent simultaneously. It was quite stressful for the customer to choose which call to end while trying to hear the first one, or to put up with extra ringing during the first reminder.

With this Release, when the Appointment Reminder Utility runs at a scheduled time, the clients will be notified first for the scheduled service, and there will be a delay of time for cancellation notifications.

This is achieved through the Key 'DelayVoiceCalls' which is added in the app. config file for an Appointment Reminder Utility.

- The default value for this key will be 0.
- The value of the key determines the delay in the duration between the Voice call received for Scheduled Service and the cancelled service.

EX: If the Value of the Key is 1, then there will be a delay of 1 minute. The user first receives the Appointment Notification Call for a scheduled service and after 1 minute the user receives the Appointment Notification voice call for a cancelled service.

Note:

- This is applicable only for Voice calls.
- This is not Applicable for Telehealth Services.

Arrivals

Reference No	Task No	Description
6	EII# 127508	Changes in the 'Arrivals' list page and 'Arrival Details' page.

Author: Aishwarya Bommaklar

6. EII# 127508: Arrivals: Changes in the 'Arrivals' list page and 'Arrival Details' page.

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

Navigation Path: 'My Office' – 'Arrivals' screen – Click on the 'New' icon.

Functionality 'Before' and 'After' release:

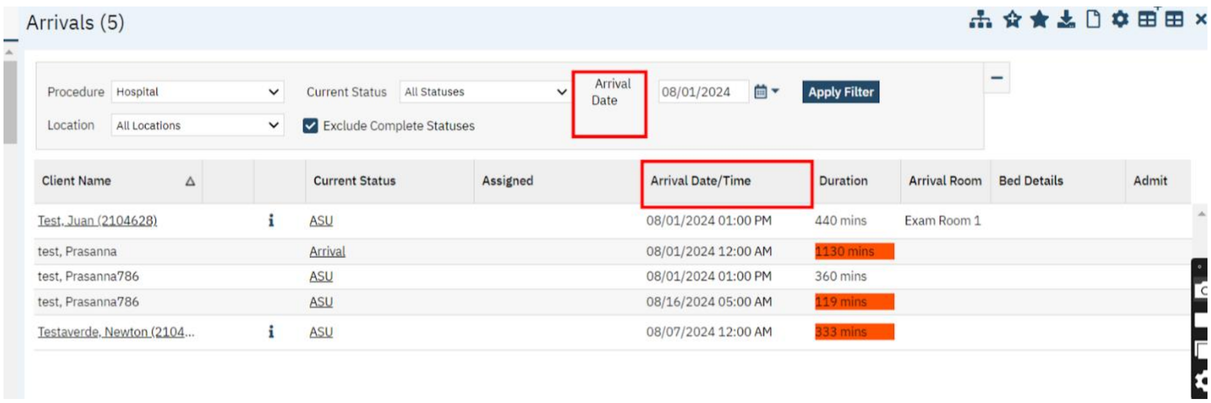
Purpose: To Change the filter field name "Start Date" to "Arrival Date" and Grid column name "Start Date /Time" to "Arrival Date/Time" to display the actual date and time of Arrival.
To Add a "Start Date" field to the 'Status History' section under 'Arrival Details' – that will provide users the ability to view the start date of that particular status and also modify the date if needed.

With this release, the below changes have been implemented in the 'Arrivals' list page and 'Arrival Details' page.
'Arrivals' List Page:

The 'Start Date' is renamed to 'Arrival Date' in the 'Arrivals' list page filter section.

The 'Start Date/Time' is renamed to 'Arrival Date/Time' in the 'Arrivals' list page grid section.

The data is initialized from the 'Arrival Date and Arrival Time' from the 'Triage Information' section under the 'Arrival Details' screen.

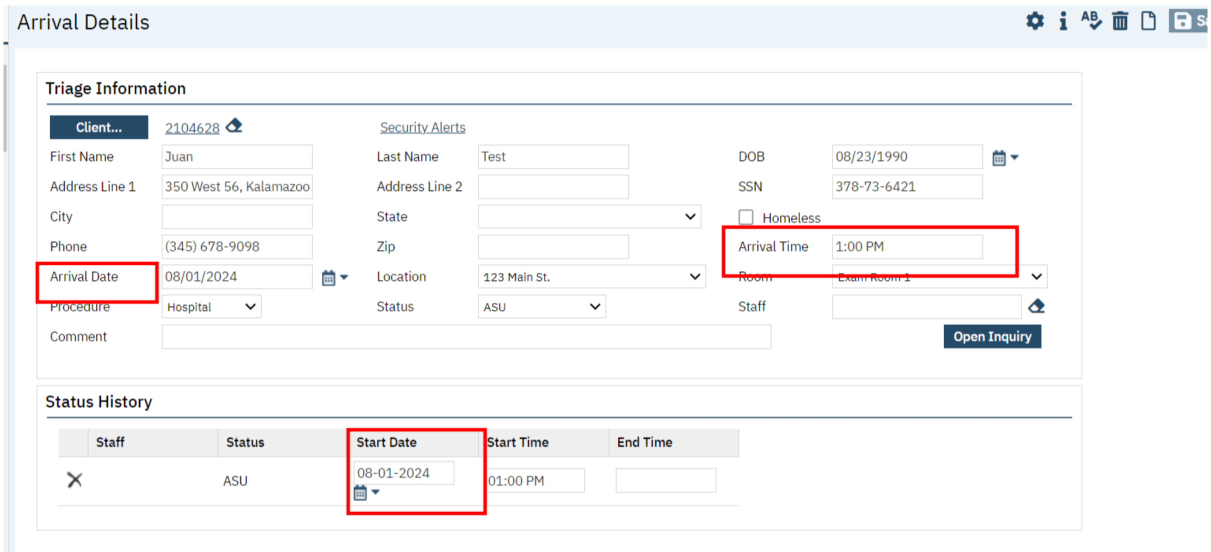


'Arrival Details' screen:

The new 'Arrival Time' textbox field is added in the 'Triage Information' section under the 'Arrival Details' screen. This field will be initialized to 'Current Time' and it is an editable field.

The 'Start Date' is renamed to 'Arrival Date' to display the actual date of the Client's Arrival.

A new 'Start Date' textbox field is added next to the 'Status' column in the 'Status History' grid section. Whenever the 'Status' is updated and saved, the 'Current Date' will be initialized in the 'Start Date' column and the user can modify the date if required.



Authorizations

Reference No	Task No	Description
8	Core Bugs # 128432	Unable to open the Authorizations (My Office) page due to an error message.
9	Core Bugs # 128436	Performance issue in the ssp_SCListPageAuthorizations.

Author: Shivakanth Moger

8. Core Bugs # 128432: Unable to open the Authorizations (My Office) page due to an error message.

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

Navigation Path: Login to the 'SmartCare' application – 'Authorization (My Office)'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The below error message was displayed when the user tried to open the 'Authorizations (My Office) screen.

Error Message: "Cannot set column 'DisplayAs'. The value violates the MaxLength limit of this column."

With this release, the issue mentioned above is resolved. Now, the user can open the 'Authorization (My Office)' screen without any error being displayed.

Author: Shivakant Moger

9. Core Bugs # 128436: Performance issue in the ssp_SCListPageAuthorizations.

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

Navigation Path 1: Log in to the application – 'Authorization (My Office)'.

Navigation Path 2: Log in to the application – 'Authorizations' (Client) – 'Authorizations' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There was a performance issue in the Authorization list page.

With this release, the above-mentioned issue is resolved. Now, the Index script is created to improve performance of the ssp_SCListPageAuthorizations .

Batch Service Entry

Reference No	Task No	Description
10	Core Bugs # 127992	Getting an error when trying to create a service in between the program enrolled and discharged dates through the Batch Service Import Files screen.

Author: Yashas Kydalappa

10. Core bugs # 127992: Getting an error when trying to create a service in between the program enrolled and discharged dates through the Batch Service Import Files screen.

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

Prerequisite:

1. Enroll the program to the client and discharge after some days.

Navigation Path: 'My Office' -- 'Batch Service Import Files' -- 'Batch Service Import Files' list page -- click on 'Upload Import File' icon -- 'Upload New services' pop-up -- click on 'Select' button in pop-up -- select the file and click on 'Upload' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Batch Service Import Files screen, when tried to create the service by uploading the excel file, in which the program had been discharged and the service creation date is in between the enrolled and discharged date, the below mentioned error was displayed.

Error Message: Client is not enrolled with an Active Program.

With this release, the above-mentioned issue has been resolved. Now, the error message is not displayed, and service is created when the user tries to create a service in between the program enrolled and discharged dates through the Batch Service Import Files screen, even though the program has been discharged.

Bedboard

Reference No	Task No	Description
11	Core Bugs #128737	Client Information popup showing wrong data.

Author: Aishwarya Bommaklar

11. Core Bugs #128737: Client Information popup showing wrong data.

Navigation Path 1: 'Client' search – Select a Client – 'Client Summary'.

Navigation Path 2: 'My Office' – 'Bedboard' screen – Click on 'Status' hyperlink – Click on 'Visit' tab – Click on 'Client name' – 'Client Summary' – Hover over the 'Client Name' in the 'Client'.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. When the Client was selected from the 'Client Inpatient Visit' screen to view the 'Client Information', and then hovered over the 'Client name' in the 'Client' menu of the 'Client Information' popup, the previously opened client information was displayed.

With this release, the above-mentioned issue is resolved. Hovering over the 'Client' menu will now display the correct information in the 'Client Information' popup, when the 'Client' is selected from the 'Client Inpatient Visit' screen to view the 'Client Information'.

Charges/Claims

Reference No	Task No	Description
12	Core Bugs # 128506	Case Rate: The case rate services were duplicated.
13	Core Bugs # 128647	The time for the dates of services is not displayed in the exported Excel file.
14	Core Bugs # 128336	The custom hook is missing in ssp_PMClaims837UpdateBundleInfoInstitutional for the 'LSBC episode key' on the 'Program Details' screen.
15	Core Bugs # 128568	Error is displaying when trying to generate a claim.
16	Core Bugs # 128585	Adding logic to check CoveragePlanRule Template Plan in ssp_PMClaims837Validations.
17	Core Bugs # 126395	The CMS 1500 paper claims were not pulling values for box number 32b and 33b which were configured in claim format configuration details screen.

Author: Roopa Hemanna

12. Core Bugs # 128506: Case Rate: The case rate services were duplicated.

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

Prerequisites:
1. Clients has a completed services.
2. The Case Rate Set up is configured.

Navigation Path 1: 'Administration' - 'Case Rate' screen - Click on New button - 'Case Rate Details' screen - Enter mandatory details in - 'General' section - 'Case Rate Service' section – click on 'Save' button – configure the 'Case Rate Setup' section – click on 'Insert' button – click on 'Save' button.

Navigation Path 2: Exec 'ssp_SCJobToCreateCaseRateServices' job.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The case rate services were duplicated, and it was creating a Case Rate every day without checking if a Case Rate had been previously created or not.

With this release, the above-mentioned issue has been resolved. Now, the Case Rate logic is modified to avoid duplicate service creation for case rate services.

Author: Roopa Hemanna

13. Core Bugs # 128647: The time for the dates of services is not displayed in the exported Excel file.

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

Navigation Path: 'My Office' – 'Charges/Claims' list page -- Select associated Charge IDs -- Click the Export icon in upper right-hand toolbar.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user exported the charges from the Charges/Claims list page, the associated time for the dates of services was not displayed in the exported Excel file.

With this release, the above-mentioned issue has been resolved. Now, when the user exports the charges from the Charges/Claims list page, the associated time for the dates of services are displayed in the exported Excel file.

Author: Rinki Kumari

14. Core Bugs # 128336: The custom hook is missing in ssp_PMClaims837UpdateBundleInfoInstitutional for the 'LSBC episode key' on the 'Program Details' screen.

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

Navigation Path: 'My Office' – 'Billing' -- 'Charges/Claims' -- 'Charges/Claims' list page – select the required charge Id – Click on 'E-Claims' button -- 'Process Now' button -- 'Create Claim File' button -- 'Save As' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The custom hook was not available for the 'LSBC episode key' on the 'Program Details' screen.

With this release, the above-mentioned issue has been resolved. Now, the custom hook has been included in 'ssp_PMClaims837UpdateBundleInfoInstitutional' to manage the bundling criteria for the LSBC episode key.

Note: The system will check for the 'LSBC Episode key', if it is not available in the client program, then core logic will work for bundling criteria of 837 Institutional claims.

Author: SaravanaKumaar Nagarajan

15. Core Bugs # 128568: Error is displaying when trying to generate a claim.

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

Navigation Path1: Go Search — Procedure / Rates -- Select procedure -- Rates/Billing Codes.

Navigation Path 2: Go Search — 'Charges/Claims' – Select a Charge Id and click on 'Electronic Claims' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a Procedure Rate had a 'To date' that exceeds the system date range, then on generating a claim, the system would throw the below red error:

Error: Adding a value to a 'datetime' column caused an overflow.

With this release, the above mentioned issue has been resolved. Now, the claims are generated successfully without any error message, when a Procedure Rate has a 'To date' that exceeds the system date range.

Author: Rinki Kumari

16. Core Bugs # 128585: Adding logic to check CoveragePlanRule Template Plan in ssp_PMClaims837Validations.

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

Prerequisite: Add the plan rule and enroll the same plan to client by the below **path:**
Plans (Administration) - - click on plan name hyperlink - - Go to Rule tab - select the radio button – Use Billing Rules From Specified Plans - - Add the rule - - click on Insert - - Save.

Billing Rule: "Only these types of Staff Credentials are billable to this plan".

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

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. If the user was trying to add the billing rule against Plan A and tried to configure the same rule in Plan B through the template radio button, there was an error displayed in the claim file pop screen while the user was executing the claim file.

Error: Active Credential is required for staff associated to this service.

With this release, a logic is added against the template plan rule radio button. Now, the user can execute the claim file successfully if the setup is correct.

Author: Yashas Kydalappa

17. Core Bugs # 126395: The CMS 1500 paper claims were not pulling values for box number 32b and 33b which were configured in claim format configuration details screen.

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

Prerequisites: The Claim Format Configuration details screen exists with the Format Fields for Box 32b Box 33b.

Navigation Path: My Office'- 'Billing' - 'Charges/Claims'-- 'Charges/Claims' list page - Select ant charge -Click on paper claim' button -'Process Now' button- Print Claims-Verify the Box 32b and box 33b values.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When processing a CMS 1500 Paper claims, the box number 32b and 33b were not pulling the values which had been configured under claim format configurations details screen.

With this release, the above-mentioned issue is resolved. Now, while processing the CMS 1500 paper claims, the values which have been configured under Claim Format Configuration details screens for box numbers 32b and 33b, are displayed.

Client Education Resources

Reference No	Task No	Description
18	Core Bugs # 128494	The added 'Education Resources' is not displayed on the 'Education Resources' (Client) screen.

Author: Chaitali Patil

18. Core Bugs # 128494: The added 'Education Resources' is not displayed on the 'Education Resources' (Client) screen.

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

Navigation Path 1: Administration -- Education Resources -- click on 'New' -- add the description as BMI -- select 'Document Type' as 'PDF' -- select 'Type of Information' as Health Data Element -- add 'Health Data' like BMI Comment and Nutrition counseling -- click on insert -- click on 'Save'.

Navigation Path 2: Administration -- Health Data Sub-Templates -- Click on new -- add the 'Name Of Template' -- under 'Add Health Data section' select 'Vitals' from the dropdown -- Select BMI Comment and Nutrition counseling -- Click on Add -- Click on 'Save'.

Navigation Path 3: Administration -- Health Data Templates -- click on 'New' - add the Name Of Template -- select step 2 sub template from the dropdown -- click on Add – save.

Navigation Path 4: Client -- Flow Sheet -- search Health Data Template (created in step 3) in the dropdown -- Click on new - fill all the required fields and add BMI Comment and check Nutrition counseling checkbox -- click on Save.

Navigation Path 5: Client -- Education Resources – Observe step 4 added record.

Functionality Before and & After Release:

Before this release, here was the behavior. The added 'Education Resources' (BMI) in the Flow Sheet was not displayed on the 'Education Resources (client)' screen.

With this release, the above-mentioned issue has been Resolved. Now, the added 'Education Resources' (BMI) in the Flow Sheet is displayed on the 'Education Resources' (Client) screen.

Client Fee

Reference No	Task No	Description
19	Core Bugs # 128594	Client Fee: Filter not working as expected.

Author: Yashas Kydalappa

19. Core Bugs # 128594: Client Fee: Filter not working as expected.

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

Navigation Path: Go Search - 'My Office' -- 'Client Fee' (My Office) -- 'Client Fee' list page - check 'Self Pay' check box - Apply Filter.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Client Fee (My Office) list page was not showing the results for self pays even though the 'Self Pay' check box was checked in the list page. The list page was showing the results for non self pays.

With this release, the above-mentioned issue has been resolved. Now the Client Fee (My Office) list page shows the result for self pays type when searching the list page with checking the 'Self Pay' check box.

Client Information(C)

Reference No	Task No	Description
20	Core Bugs # 128735	Massive Errorlog count increase in the Errorlog table.
21	EII # 127966	Changes in the MAT tab of the 'Client Information Screen'.
22	Core Bugs # 128644	Client Information(C): Data is clearing out in the Demographics tab for a few fields.

Author: Sachin Ranganathappa

20. Core Bugs # 128735: Massive Errorlog count increase in the Errorlog table.

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

Navigation Path: Login to Smart Care - Client Search - " Client Information (C)".

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Error was logged in Errorlog table, when the user:

- navigated to Client Information (C) screen.
- navigated to any tab in Client Information (C) screen.
- performed any action in Client Information (C) screen.

With this release, the above-mentioned issue has been resolved. Now, there is no Errorlog generated in the Errorlog table on performing the above actions in Client Information (C).

Author: Ramya Nagaraj

21. EII # 127966: Changes in the MAT tab of the 'Client Information Screen'.

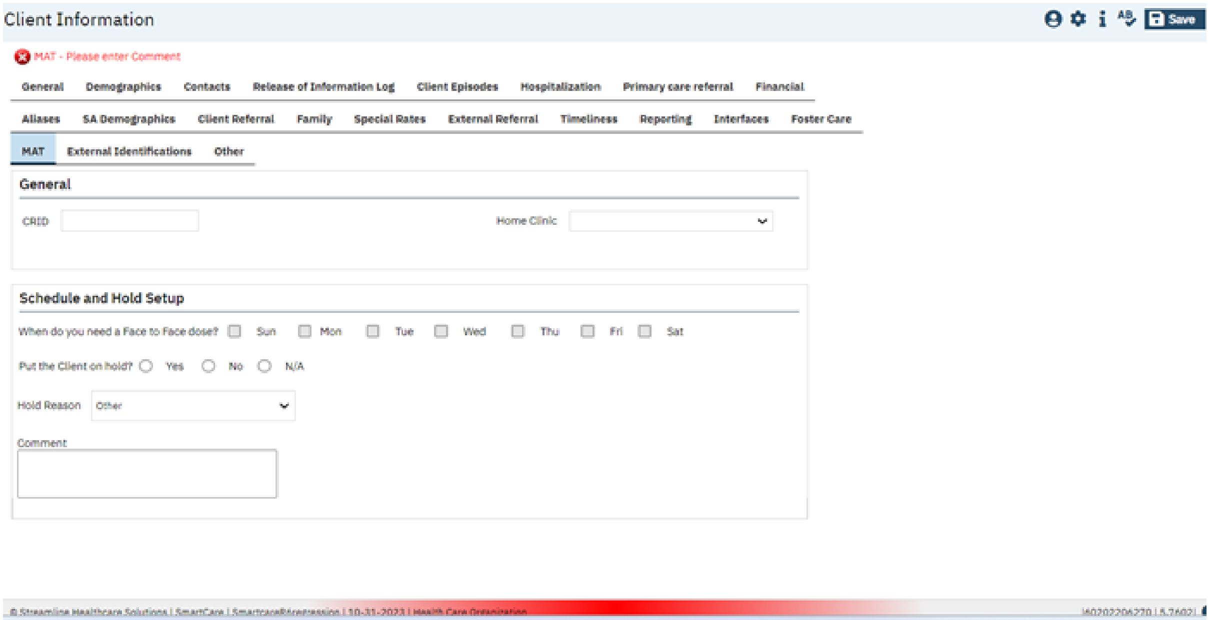
Release Type: Change **|** **Priority:** High

Navigation Path: 'Client' search — 'Client Information(C)' screen - 'MAT' tab.

Functionality 'Before' and 'After' release:

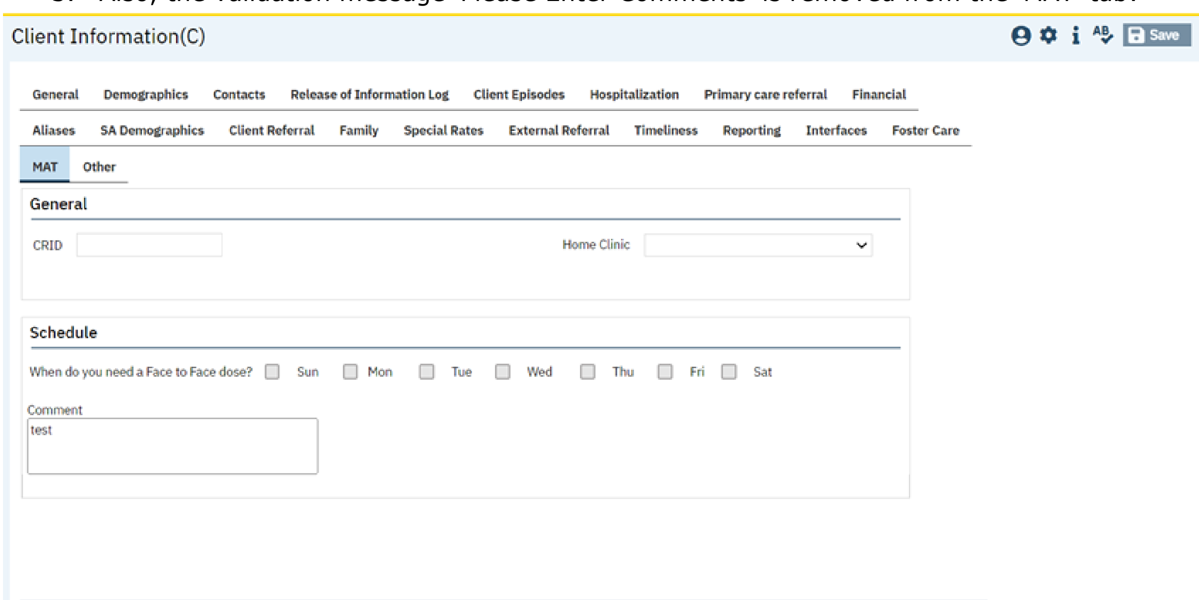
Purpose: To remove the 'Put the Client on hold?' Radio button field with 'Yes', 'No' and 'N/A' options & 'Hold Reason' dropdown field.

Before this release, here was the behaviour. In the 'MAT' tab of the 'Client Information(C)' screen, the 'section name' was 'Schedule and Hold Setup.' This section contained a 'Put the Client on hold?' radio button field and a 'Hold Reason' dropdown field. Additionally, a validation message 'MAT- Please enter Comment' was displayed.



With this release, the above-mentioned issue has been resolved. Now, the section name has been changed to 'Schedule' and the below fields are removed from the 'MAT' tab of the 'Client Information(C)' screen.

1. 'Put the Client on hold?' Radio button field with 'Yes', 'No' and 'N/A' options.
2. Hold Reason' dropdown field.
3. Also, the validation message 'Please Enter Comments' is removed from the 'MAT' tab:



Author: Praveen Gangadhara

22. Core Bugs # 128644: Client Information(C): Data is clearing out in the Demographics tab for a few fields.

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

Prerequisite: The configuration key 'ShowOnlyRelevantFieldsForCalMHSAOnCoreInquiry' is set to 'Yes'.

Fill all mandatory details in the Inquiries details screen and create/link the client.

Navigation Path 1: Client -- Client Information(C) -- Client Information(C) screen -- 'Demographics' tab – Entered required details – click on Save.

Navigation Path 2: Client -- Client Inquiries -- 'Inquiry Details' screen – Modify/enter all the required fields data.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Demographics tab of the 'Client Information(C)' screen, the entered data was cleared out when the user modified the data in 'Inquiry Details' screen and navigated back to the Demographics tab of the 'Client Information(C)' screen.

With this release, the above-mentioned issue has been resolved. Now, the entered data is not cleared out in the Demographics tab when the user modifies any data in 'Inquiry Details' screen and navigates back to the Demographics tab of the 'Client Information(C)' screen.

Note:

- **This fix is for specific customers**.
- **When the configuration key 'ShowOnlyRelevantFieldsForCalMHSAOnCoreInquiry' is set to 'No', the functionality will work without any data clearing out issue.**

Client Orders

Reference No	Task No	Description
23	Core Bugs # 128596	After inserting 'Order Set' In the Quick order screen on saving, Frequency is getting cleared.
24	Core Bugs # 128548	Jumbled data is displayed in the Client Order PDF.
25	EII # 128211	Implementation of Typeable Search box in Orders.
26	Core Bugs # 128604	Client Orders: Unable to view full order 'Comments' and 'Instruction Text' without editing the order.
27	Core Bugs # 128569	Client Order: The most Recent "Reviewed By" information was not displaying correctly.

Author: Chaitali Patil

23. Core Bugs # 128596: After inserting 'Order Set' In the Quick order screen on saving, Frequency is getting cleared.

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

Navigation Path 1: Administration -- Orders -- Click on 'New' – Select any order type – fill all required fields – under the 'Option Section' select radio button as 'Yes' for 'Quick Order' - Click on save.

Navigation Path 2: Go search – 'Order Sets' Administration – Click on 'New' – Enter Order set name – under the 'Building Order Set' Section Select Order type – – search and select created order in Navigation Path 1 – 'Click on 'Add' – Click on 'Save'.

Navigation Path 3: Perform 'Client search' -- Go search – Quick orders – click on 'New' – search Order Sets created in (Navigation Path2) -- fill all required field – Click on 'Add Order' – Click on 'Save'.

Functionality Before and & After Release:

Before this release, here was the behavior. After inserting 'Order Set' In the Quick Order screen , the 'Frequency was getting cleared on saving.

With this release, the above-mentioned issue has been Resolved. Now, after inserting 'Order Set' In the Quick Order screen on saving, 'Frequency is retained.

Author: Sithara Ponnath

24. Core Bugs # 128548: Jumbled data is displayed in the Client Order PDF.

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

Navigation Path: 'Client' --- 'Client Orders' -- 'Client Orders' list page -- Click on 'New' icon – 'Client Order' screen -- Search and select an order of type 'Additional' -- Enter required data -- Click on 'Insert' button --- Click on 'Save/Sign' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user signed the Client Order of an additional order, jumbled data was displayed in the signed PDF document.

With this release, the above-mentioned issue has been resolved. Now, jumbled data is not displayed in the PDF document and it is displaying properly, when the user signs the Client Order of an additional order.

Author: Madhu Basavaraju

25. EII # 128211: Implementation of Typeable Search box in Orders.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' or 'No' by following the below **path:**

Administration - Configuration Keys – DisplayStaffAsTypeableSearchTextBox.

Note: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as a typeable search textbox.

- When the system configuration key value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

- When the system configuration key value is set to "No", then the staff drop-down will be displayed as a drop-down. This will be the default value of the key, as **it drives the existing behaviour**.

Note: If by chance the configuration key value is updated with any value apart from the allowed values, the **system will consider the default behaviour, i.e., the same as the key value is "No".**

Navigation Path 1: 'My Office' – 'Orders/Rounding' – 'Assigned To' and 'Ordered By' typeable textbox.

Navigation Path 2: 'My Office' – 'Orders' – 'All Assigned Staff' and 'Ordered By' typeable textbox.

Navigation Path 3: 'Client' search – 'Client orders' list page – 'Assigned To' and 'Ordering Physician' typeable textbox – Click on 'New' icon – 'Client Order' details – 'Order Entry Details' section – 'Entered By' and 'Ordering Physician' typeable textbox.

Navigation Path 4: 'Client' search – 'Orders/Rounding' list page – 'Assigned To' and 'Ordered By typeable textbox.

Navigation Path 5: 'Client' search – 'Quick Orders' details screen - 'Ordering Physician' typeable textbox.

Navigation Path 6: 'Client' search – 'Medical Progress Note – New – Select Template – OK – Place Orders - 'Ordering Physician' typeable textbox.

Navigation Path 7: 'Client' search – 'IP/Psychiatric Note– Select 'Note Type' – Medical Decision Making' tab - 'Quick Orders' - 'Ordering Physician' typeable textbox.

Navigation Path 8: 'My Office' – 'Schedule' Widget – 'All Staff' typeable textbox.

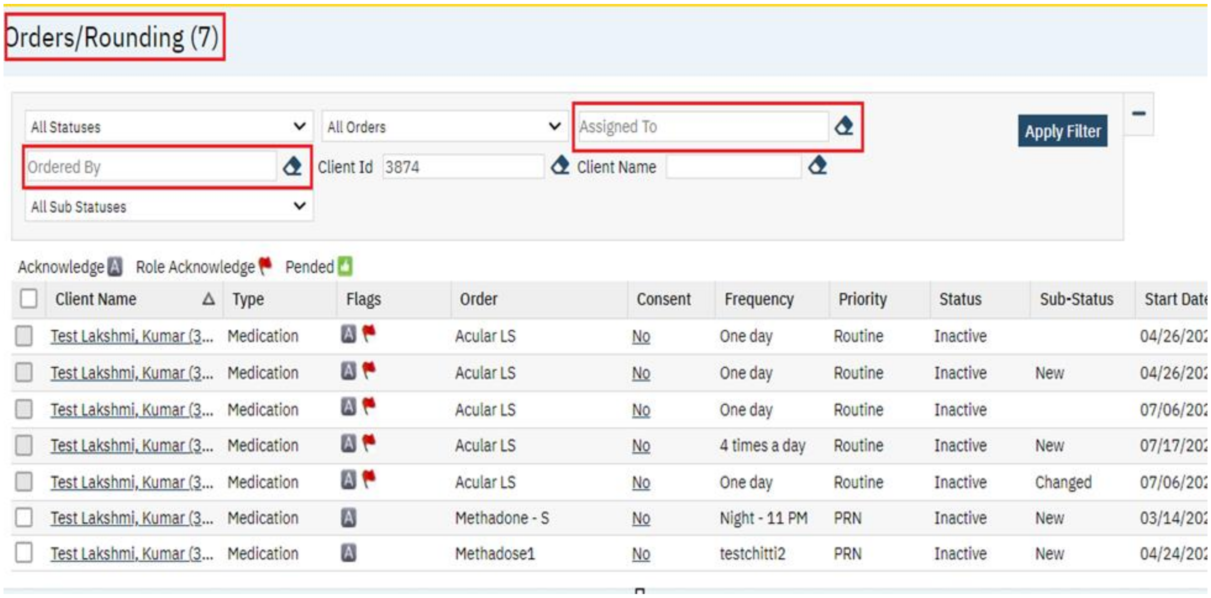
Functionality 'Before' and 'After' release:

Purpose: To change the 'Staff' dropdown to a 'Typeable search box' for the 'Orders' related screens to improve the system performance when there are large number of staff records.

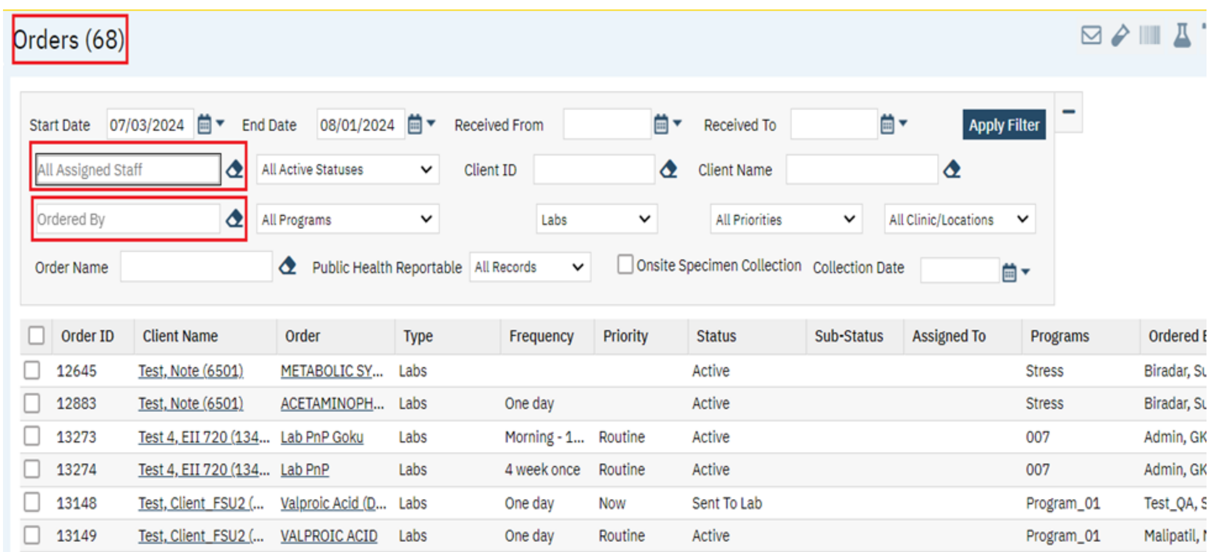
With this release, a 'Typeable Search box' for the 'Orders' related screens has been implemented.

When the user searches with any staff name under the Staff 'Typeable Search textbox', a typeable search textbox displays the list of staff names in the typeable search text field for the below-mentioned 'Orders' related list of screens.

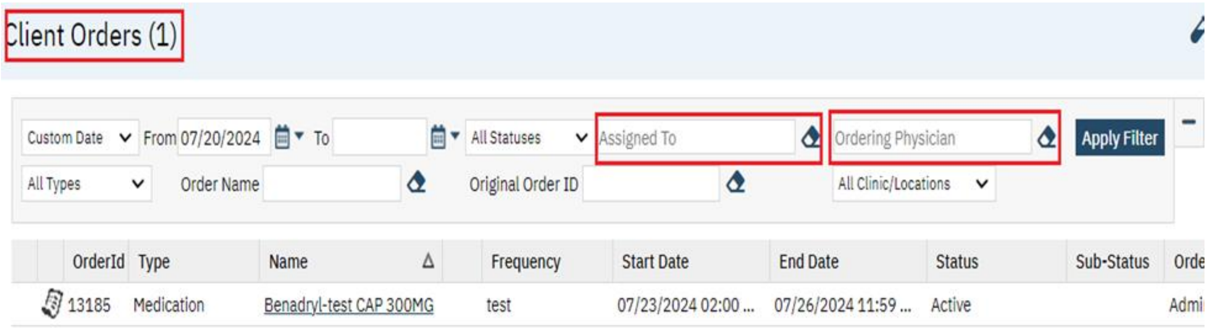
1. 'Orders/Rounding' (My Office) list page



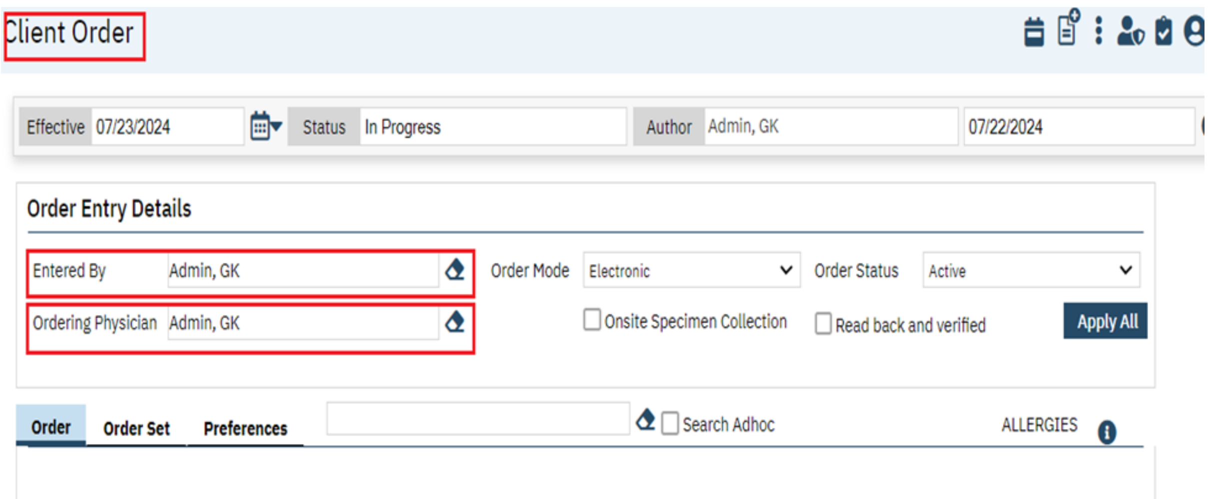
2. 'Orders' (My Office) list page



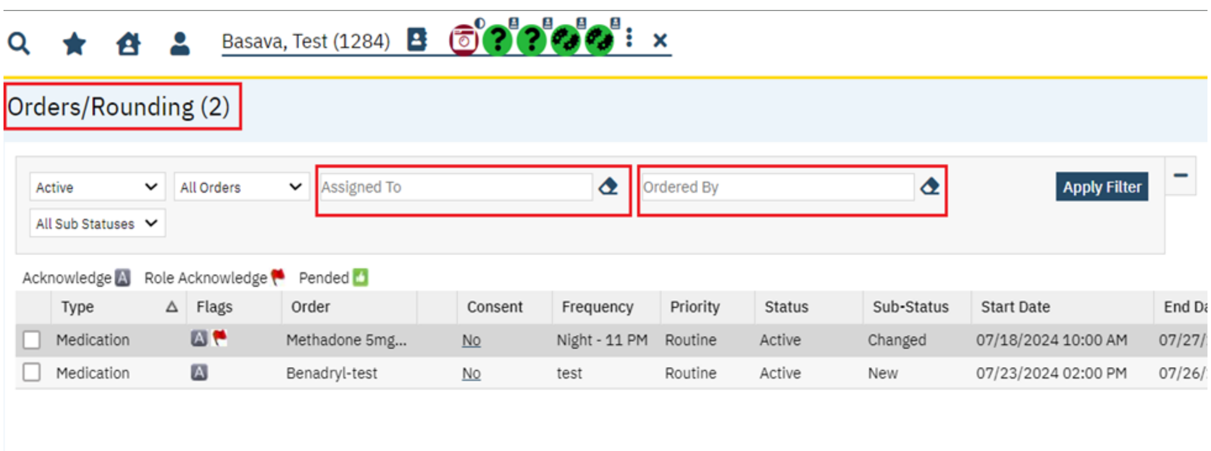
3. 'Client Orders' list page



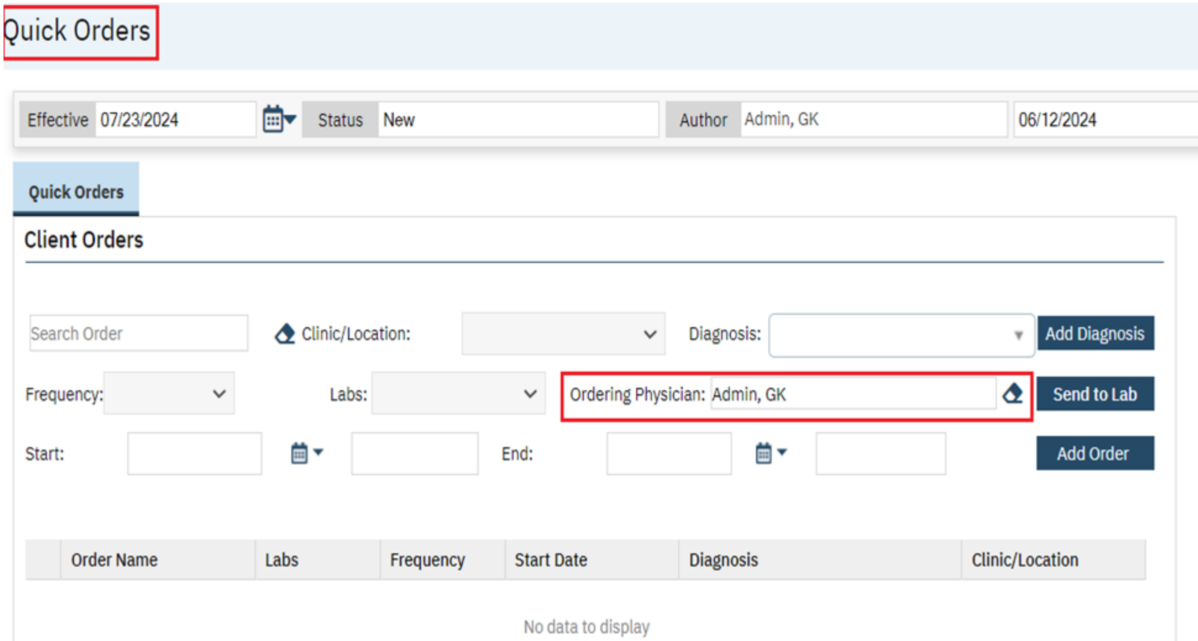
1. **'Client Order' details page**



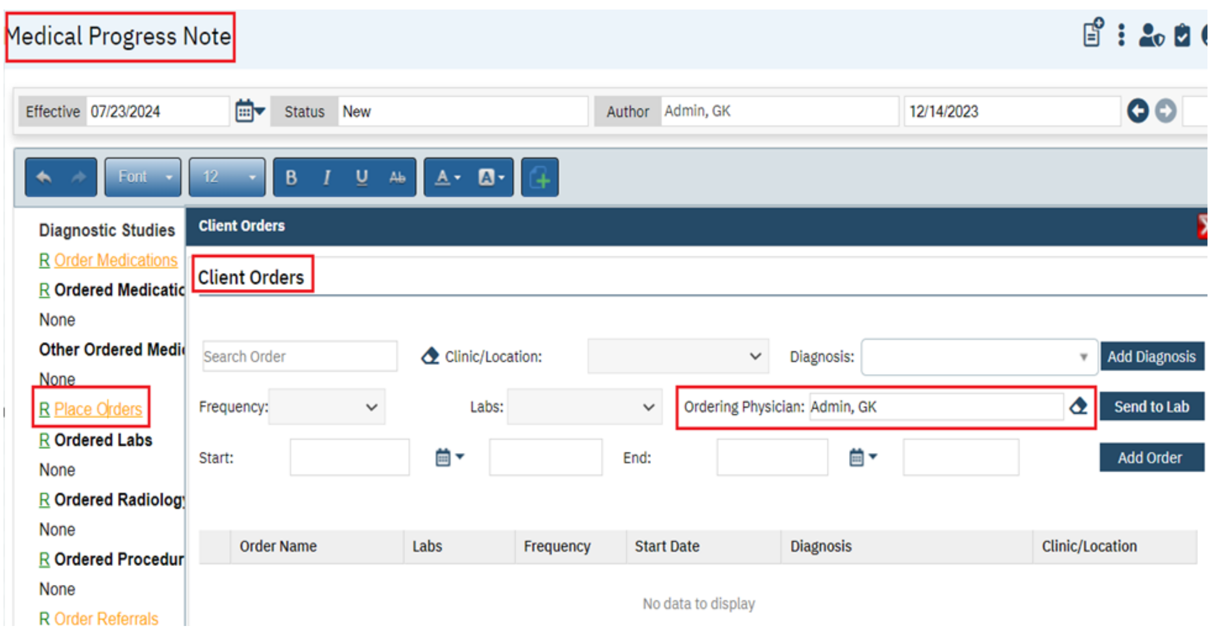
5. **'Orders/Rounding' (Client) list page**



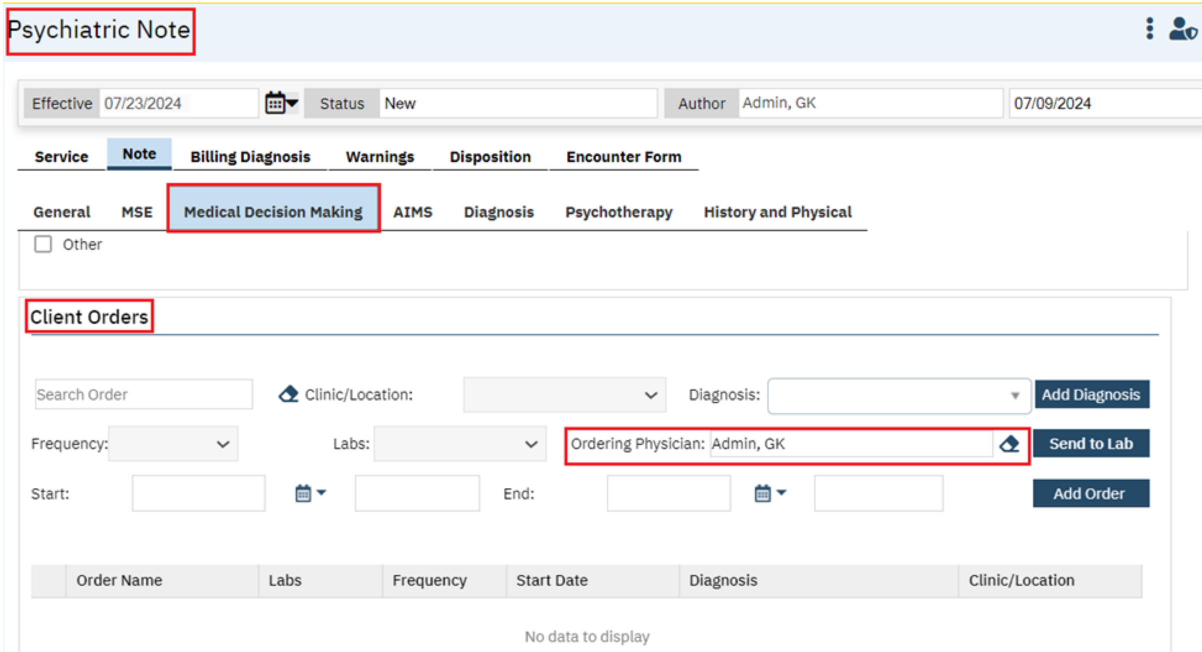
6. **'Quick Orders' details page**



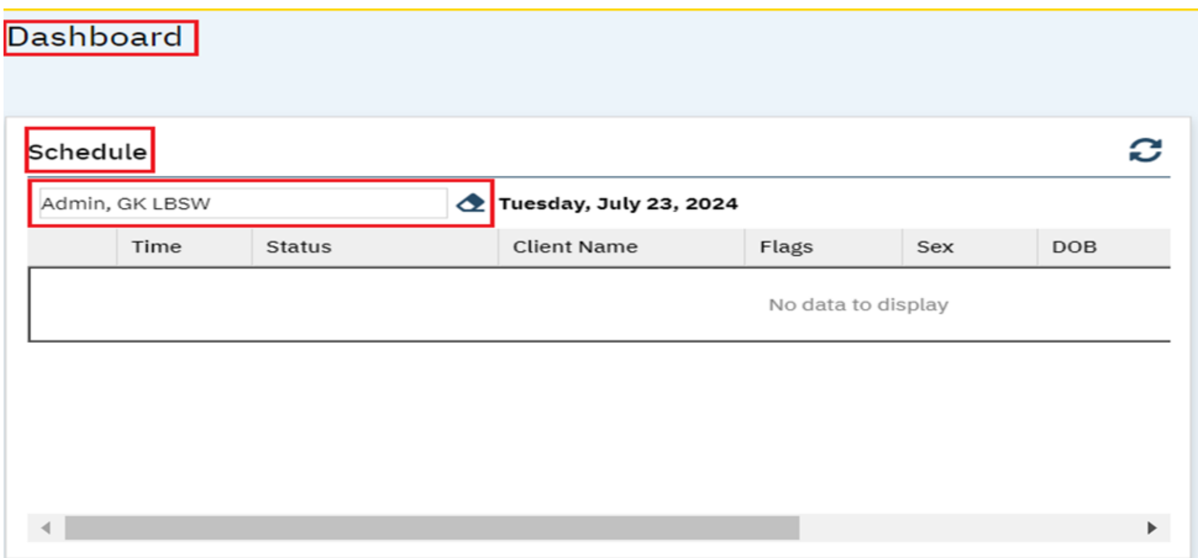
7. 'Medical Progress Note' details page



8. 'IP/Psychiatric Note' details page



'Schedule' Widget: Changes done for the 'Staff' Dropdown to a typeable search box.



Author: Madhu Basavaraju

26. Core Bugs # 128604: Client Orders: Unable to view full order 'Comments' and 'Instruction Text' without editing the order.

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

Navigation Path 1: Administration -- Orders -- Click on 'New' – 'Order Details' page -- Select any Order Type -- fill all required fields – Click on 'Save'.

Navigation Path 2: Client -- Client Orders -- Click on 'New' – 'Client Order' page -- search for (Navigation Path 1) order – add comment text with line break statements in comment box - add text with line break statements in 'Instruction Text' 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 Order 'Name' hyperlink.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the Client Order Details, unable to view full order 'Comments' and 'Instruction Text' without editing the order.

With this release, the above-mentioned issue has been fixed. Now, In the Client Order Details, full order 'Comments' and 'Instruction Text' are displayed without editing the order.

Author: Chaitali Patil

27. Core Bugs # 128569: Client Order: The most Recent "Reviewed By" information was not displaying correctly.

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

Prerequisites: To enable 'Nurse Review' Button in the 'Review' tab, we need to deny the permission for 'Ordering Physician' for a 'Staff List' through below **path:**

Login to SmartCare application – Go search – 'Staff/User Admin – search and select respective staff – Navigate to Roles/ Permission tab – Search for 'Staff List' – In Permission Item select 'Ordering Physician' – Click on 'Apply Filter' – 'Deny' the permission – Click on 'Save'.

Navigation Path 1: Go search – Orders (Administration) – Click on 'New' – Select Order type as 'Lab' – select 'Health Data Template' – Enter all the required fields – Click on Save.

Navigation Path 2: Perform Client search **-** Go search – 'Client Orders'(Client) – Click on new - select order (Created from Navigation path 1) -Enter all the required fields – Click on Insert – Click on 'Save' – Sign the order.

Navigation Path 3:'Client Order' list page – Click on Order Name hyperlink (Signed Order created from the Navigation Path 2) -Navigate to the 'Lab Result' tab – Add Lab result Details – Click on Insert – click on 'save' – Navigate to the 'Review' tab – fill all required fields – click on 'Nurse Reviewed' button – Record is added in 'Review History' – Log out from logged in staff –Login again rom Other Staff – again select same client – go to client order list page - Click on (Signed Order created from the Navigation Path 2) Order Name ' hyperlink -- Navigate to the 'Review' tab – fill all required fields – click on 'Nurse Reviewed' button – Record is added in 'Review History – and next to the 'Nurse Review' button the most Recent "Reviewed By" information is displayed.

Navigation Path 4: Perform Client search **--** Go search – 'Lab result review' (Client) – and there also next to the 'Nurse Review' button most Recent "Reviewed By" information should be displayed.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the client order list page, for the 'Lab Orders' under the 'Review' tab, the most Recent "Reviewed By" information was not displaying correctly.

With this release, the above-mentioned issue has been Resolved. Now, in the client order list page for 'Lab Orders' under 'Review' tab, the most Recent "Reviewed By" information is displayed correctly. Also, in the Lab result review' (Client) screen, the most Recent "Reviewed By" information is displayed correctly.

Client Search

Reference No	Task No	Description
28	Core Bugs # 128408	The Provider Name hyperlink is not directing to the appropriate Client Information Screen associated to other client records.

Author: Sachin Ranganathappa

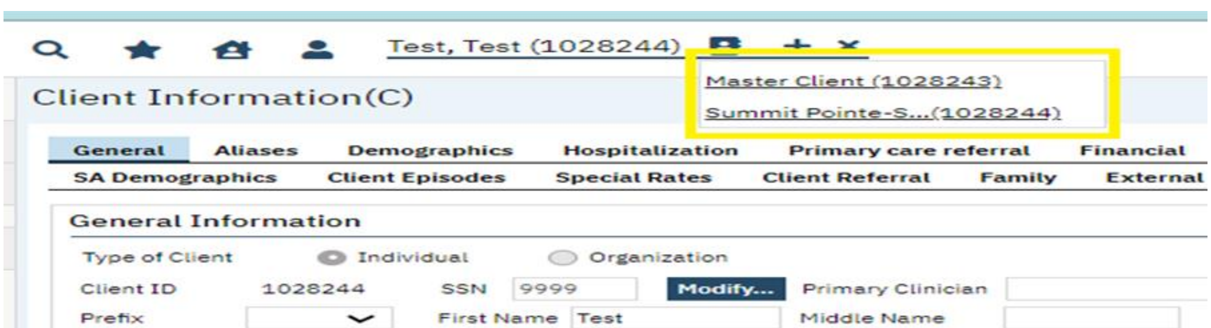
28: Core Bugs # 128408: The Provider Name hyperlink is not directing to the appropriate Client Information Screen associated to other client records.

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

Navigation Path: Log in -- Search Client -- select a client -- Clicked the icon besides Client Search and clicked Master client.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user clicked on the Provider Client from the dropdown, the system was not directing user to the respective Client Information Screen.



With this release the above-mentioned issue has been resolved. Now the user is navigated to respective Client Information screen, when clicked on the Provider Client from the dropdown.

Client Summary

Reference No	Task No	Description
29	Core Bugs # 127491	Client Summary: Diagnosis document's ICD codes is not updating.

Author: Praveen Gangadhara

29: Core Bugs # 127491: Client Summary: Diagnosis document's ICD codes is not updating.

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

Prerequisite:

- Sign the Service Note having 'Diagnosis' tab (Ex: IP Psychiatric Note/Psychiatric Note) by adding ICD codes by following the below **Path:**

Client -- Map Program/Procedure/Location -- Navigate to Service note -- New -- Take any service note having 'Diagnosis' tab (Ex: IP Psychiatric Note/Psychiatric Note) -- Fill all mandatory details -- Go to 'Diagnosis' tab and add ICD codes -- Sign.

- Navigate to 'Client Summary' and observe the ICD codes details are populated.

Path: Client -- Navigate to 'Client Summary' -- Observe the ICD codes details are populated.

Navigation Path 1: Go Search -- Client -- Documents -- 'Diagnosis' document -- Sign the document with ICD codes.

Navigation Path 2: Client -- Again navigate to 'Client Summary' -- Observed the latest signed 'Diagnosis' document's ICD codes details are populated.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In 'Client Summary', signed 'Service Notes' ICD code was populating but 'Diagnosis' document's ICD code was not populating into the 'Client Summary' screen.

With this release, the above-mentioned issue has been resolved. Now in 'Client Summary' screen, both 'Service Notes' ICD code and 'Diagnosis' document's ICD code details are populating into 'Client Summary' screen.

Clinical Data Access Groups (CDAG)

Reference No	Task No	Description
30	Core Bugs # 128531	ProgramId column was not updating based on the ClientProgramID column in the Documents table.

Author: Sunil Belagali

30: Core Bugs # 128531: ProgramId column was not updating based on the ClientProgramID column in the Documents table.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The ProgramId column was not updating based on the ClientProgramID column in the Documents table.

With this release, issue has been fixed. Now, the ProgramId column is updating based on the ClientProgramID column in the Documents table.

Compliance Core

Reference No	Task No	Description
31	Core Bugs # 128619	'Messages' screen: 'Client Access Request' hyperlink is removed from Reference column.

Author: Savitha Siddaraju

31: Core Bugs # 128619: 'Messages' screen: 'Client Access Request' hyperlink is removed from Reference column.

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

Navigation Path: 'My Office' -- 'Messages' screen -- 'Reference' column

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In 'Messages' screen, a 'Client Access Request' hyperlink was displayed in the 'Reference' column

With this release, the above-mentioned issue has been resolved. Now, the 'Client Access Request' hyperlink is removed from the "Reference" column in the 'Messages' screen.

Dashboard

Reference No	Task No	Description
32	Core Bugs # 128706	The "My Outgoing Referrals" widget is duplicated and appears twice in the dashboard.

Author: Sithara Ponnath

32: Core Bugs # 128706: The "My Outgoing Referrals" widget is duplicated and appears twice in the dashboard.

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

Navigation Path: 'My Office' --- 'Dashboard' screen – Click on the '+' icon to add a widget – Select the 'My Outgoing Referrals' widget --- Click on the 'Save' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user added the 'My Outgoing Referrals' widget, the duplicate widgets were created and appeared twice in the Dashboard.

With this release, the above-mentioned issue has been fixed. Now, duplicate widgets are not created when the user adds the 'My Outgoing Referrals' widget in the 'Dashboard'.

DFA

Reference No	Task No	Description
33	EII # 128143	Implemented the 'Typeable Search Text Box' Item Type for the DFA Forms.
34	Core Bugs # 128659	Fields on DFA Tabs Not Displaying After DFA Modification.
35	Core Bugs # 128699	Dropdown lists are not populating on forms.

Author: Rakesh Nagangouda

33: EII # 128143: Implemented the 'Typeable Search Text Box' Item Type for the DFA Forms.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' or 'No' by following the below **path:**

Administration - Configuration Keys – DisplayStaffAsTypeableSearchTextBox.

Note: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as a typeable search textbox.

- When the system configuration key value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

- When the system configuration key value is set to "No", then the staff drop-down will be displayed as a drop-down. This will be the default value of the key, as **it drives the existing behaviour**.

Note: If by chance the configuration key value is updated with any value apart from the allowed values, the **system will consider the default behaviour, i.e., the same as the key value is "No".**

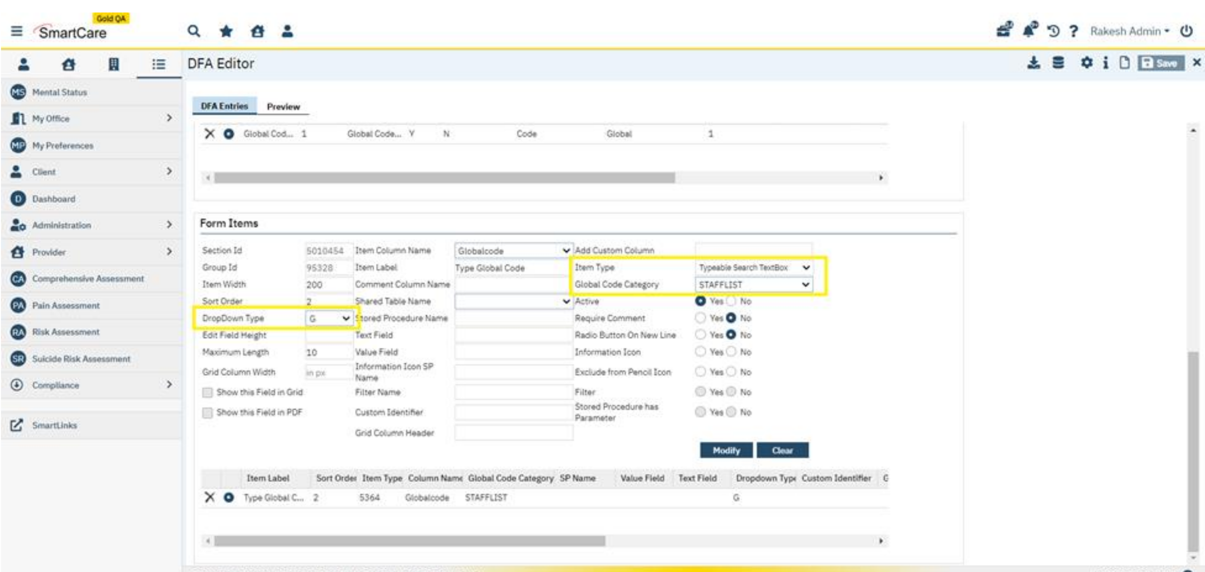
Navigation Path: Login to SmartCare application -- 'Forms' List page -- Select/Create a Form -- DFA editor page -- Form Items Section -- 'Item Type' Field DropDOwn -- Observe that 'Typeable Search Text Box' field value is displaying.

Functionality 'Before' and 'After' release:

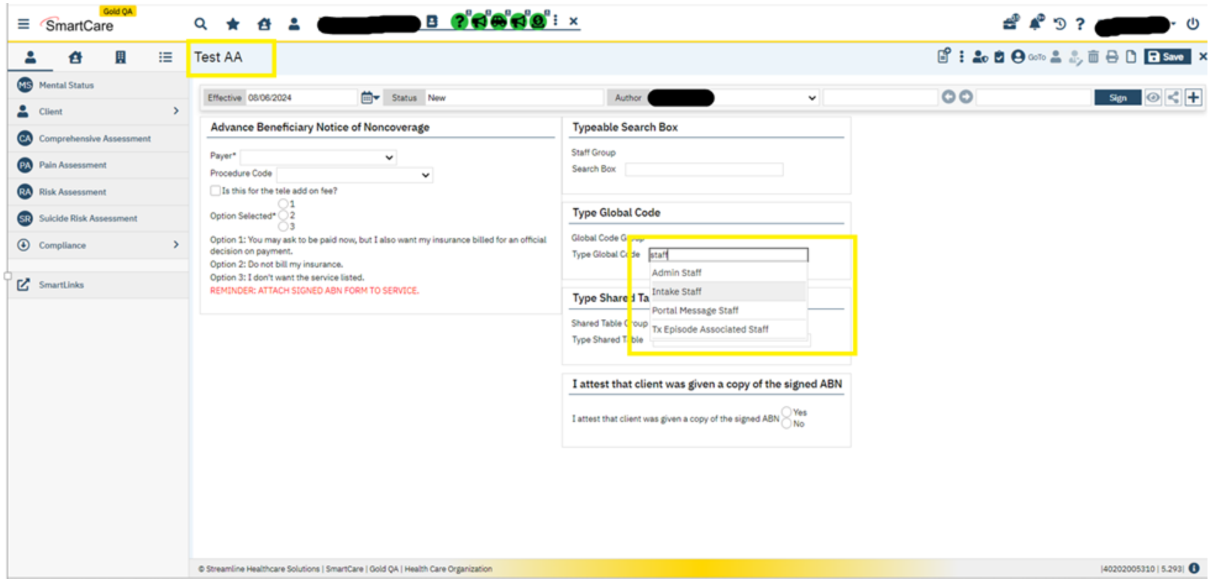
Purpose: To implement the 'Typeable Search Text Box' Item Type for the DFA Forms to improve the system performance when there are large number of staff records.

With this release, a new 'Typeable search text box' Item Type has been implemented for all dropdown type in DFA. This has been implemented to support a typeable search text box in DFA Screens (List Page, Detail page, Documents).

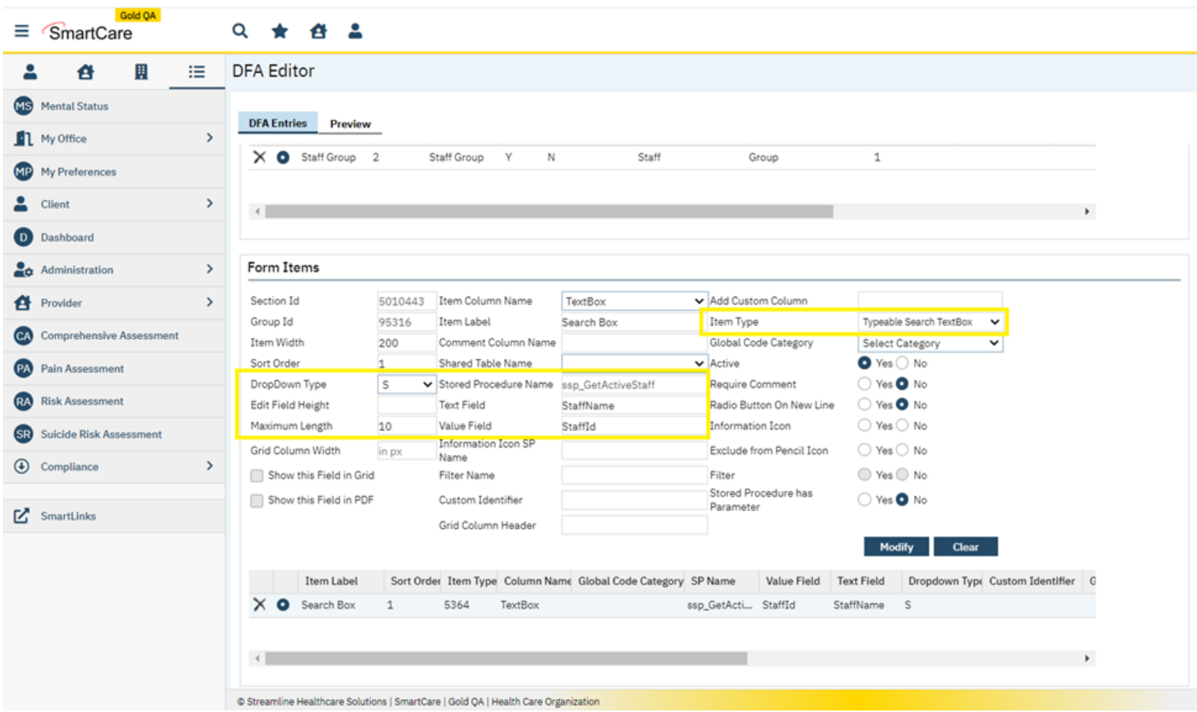
1. "Typeable Type Search Text Box" Item Type selected for DropDown Type 'G': When the 'DropDown Type' field is set to 'G' and 'Global Code Category' is selected.



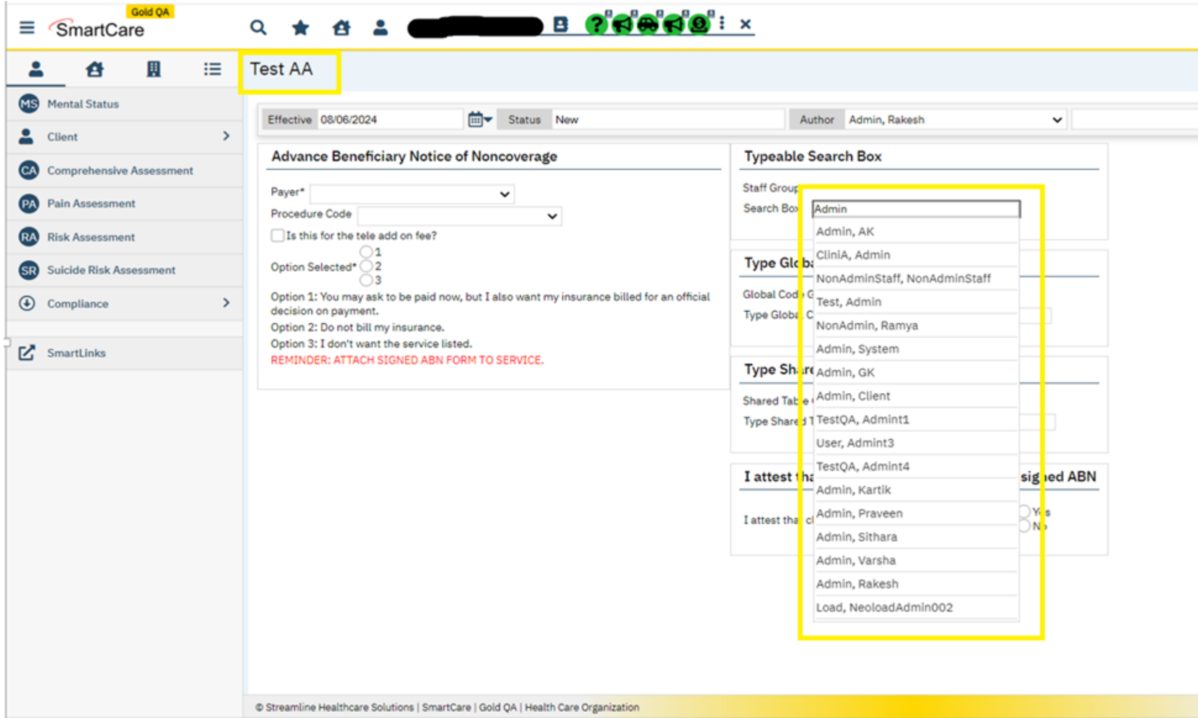
Values displaying in the Screen:



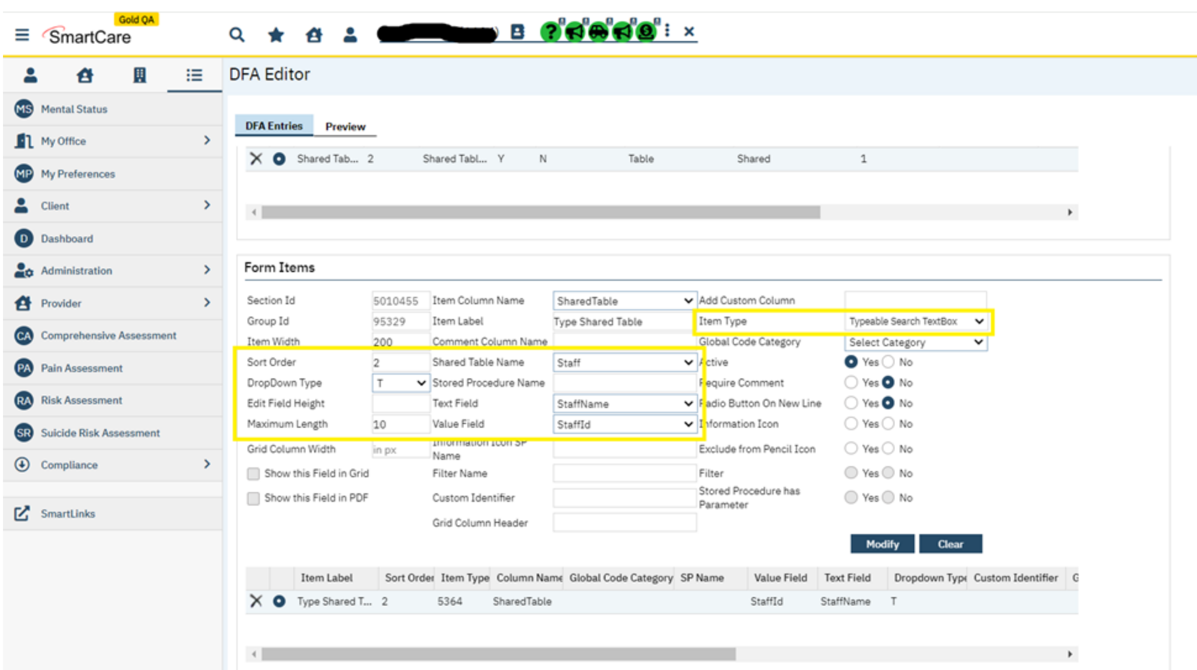
2. "Typeable Type Search Text Box" Item Type selected for DropDown Type 'S':When the 'DropDown Type' field is set to 'S' and 'Stored Procedure Name" Text Field" Value Field' is selected.



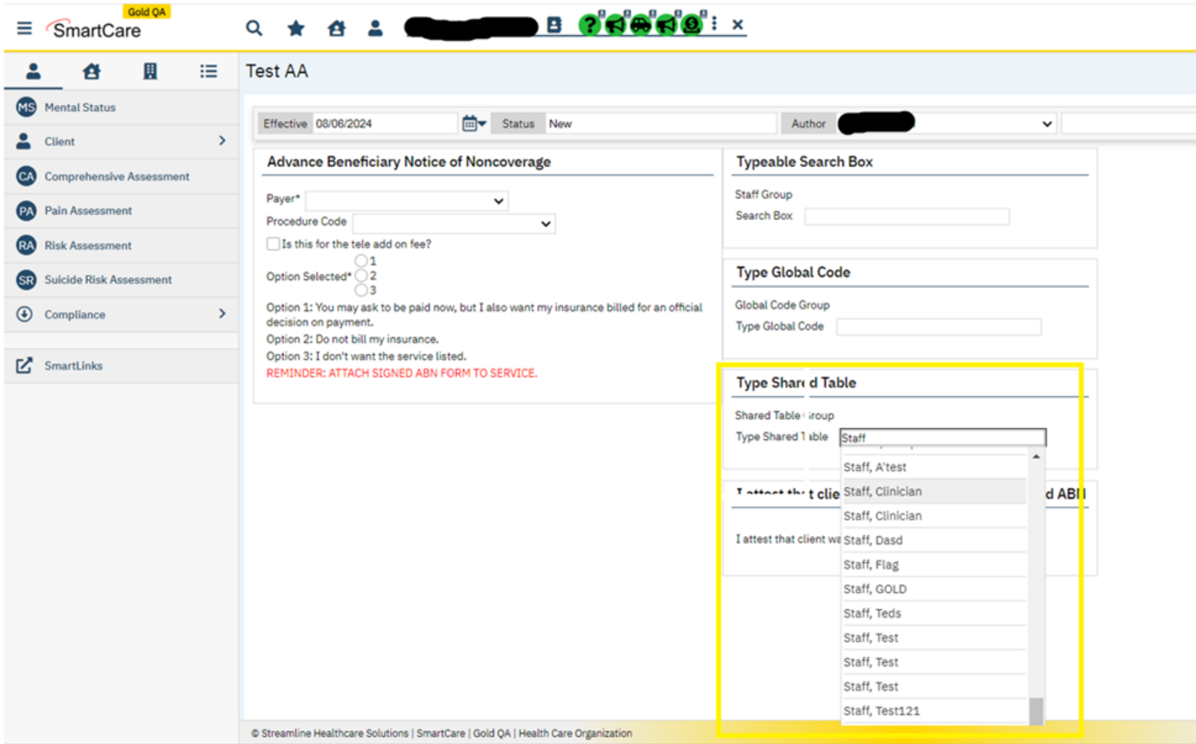
Values displaying in the Screen:



3. "Typeable Type Search Text Box" Item Type selected for DropDown Type 'T':When the 'DropDown Type' field is set to 'T' and 'Shared Table Name" Text Field" Value Field' is selected.



Values displaying in the Screen:



Author: Sunil Belagali

34: Core Bugs # 128659: Fields on DFA Tabs Not Displaying After DFA Modification.

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

Navigation Path 1: Login to SmartCare application –Refresh shared table - Select the Client – Navigate to multi tab DFA document screen –Switch between the tabs – Close the Document and unselect the Client.

Navigation Path 2: Navigate to forms - Select the respective Form of the Document opened in Navigation Path 1 – Select the Radio button of any of the Form Section – Click on Modify – Save.

Navigation Path 3: Select the same Client - Navigate to multi tab DFA document screen - Switch between the tabs - Observe that tab details are displaying correctly.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user opened any Form of a Multi-tab DFA document and modified it, the tab details were not displayed in the Document.

With this release, the above-mentioned issue has been resolved. Now, when the user opens any Form of a Multi-tab DFA document and modifies, the tab details are displaying correctly in the Document.

Author: Sunil Belagali

35: Core Bugs # 128699: Dropdown lists are not populating on forms.

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

Navigation Path 1: Login to SmartCare application – Forms – Forms detail page – Form items section – Create/select a Form Item having 'S' dropdown type and a Stored Procedure with default parameter.

Navigation Path 2: Select the Client - Navigate to DFA document screen configured in Navigation path 1 – Scroll to the configured Form item - Click on the Dropdown – Observe that values are displaying.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the Dynamic Form of a DFA document has a Form Item that has 'S' dropdown type and a Stored Procedure with default parameter (ex: @DcoumentVersionId INT = -1 (Or Any value)), the dropdown values were not populating in the respective DFA Document screen.

With this release the above-mentioned issue has been resolved. Now, if the Dynamic Form of a DFA document has a Form Item having 'S' dropdown type and a 'Stored Procedure with default parameter (ex: @DcoumentVersionId INT = -1 (Or Any value)), the dropdown values are populating in the respective DFA Document screen.

Disclosures/Requests

Reference No	Task No	Description
36	Core Bugs # 128466	Disclosure/Request Details screen: when adding document name with forward slash ("/") is added to list of documents, it is not showing properly in the grid.
37	EII # 128143	Implemented the 'Typeable Search Text Box' Item Type for the DFA Forms.

Author: Ramya Nagaraj

36. Core Bugs # 128466: Disclosure/Request Details screen: when adding document name with forward slash ("/") is added to list of documents, it is not showing properly in the grid.

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

Navigation Path: 'Disclosures/Requests' - 'Disclosure/Request Details' screen - 'Attach / Review Items Disclosed...' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In 'Disclosure/Request Details' screen, when a document with Forward slash ("/") in its name was added to list of documents to be disclosed, then the same is not displayed properly in the grid. The forward slash in the document name is replaced with the percentage symbol.

With this release, the above mentioned issue has been resolved. Now, in 'Disclosure/Request Details' screen, when a document with Forward slash ("/") in its name is added to list of documents to be disclosed, then the same is displaying properly in the grid.

Author: Rakesh Nagangouda

37. EII # 128143: Implemented the 'Typeable Search Text Box' Item Type for the DFA Forms.

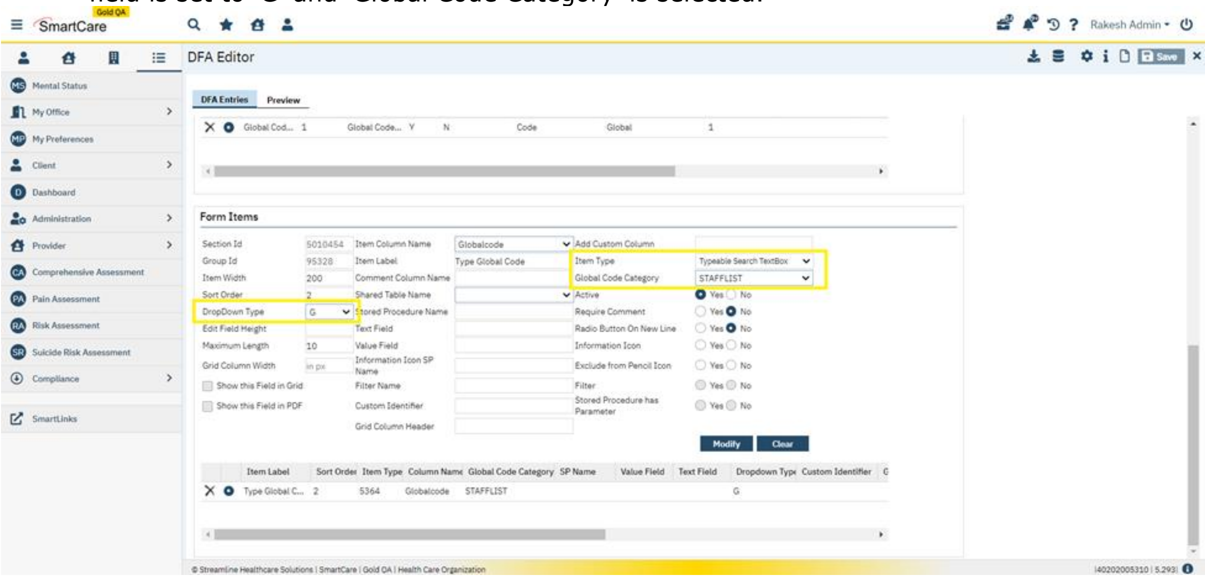
Release Type: Change **| Priority:** On Fire

Navigation Path: Login to SmartCare application -- 'Forms' List page -- Select/Create a Form -- DFA editor page -- Form Items Section -- 'Item Type' Field DropDOwn -- Observe that 'Typeable Search Text Box' field value is displaying

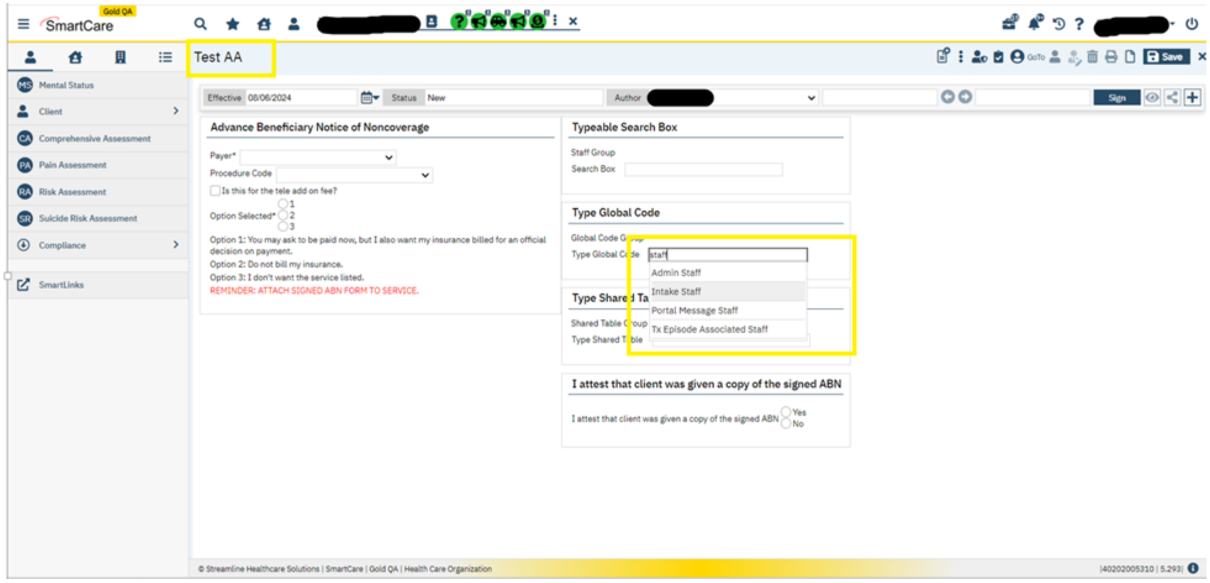
Functionality 'Before' and 'After' release:

Purpose: To implement the 'Typeable Search Text Box' Item Type for the DFA Forms.
With this release, a new 'Typeable search text box' Item Type has been implemented for all dropdown type in DFA. This has been implemented to support a typeable search text box in DFA Screens (List Page, Detail page, Documents).

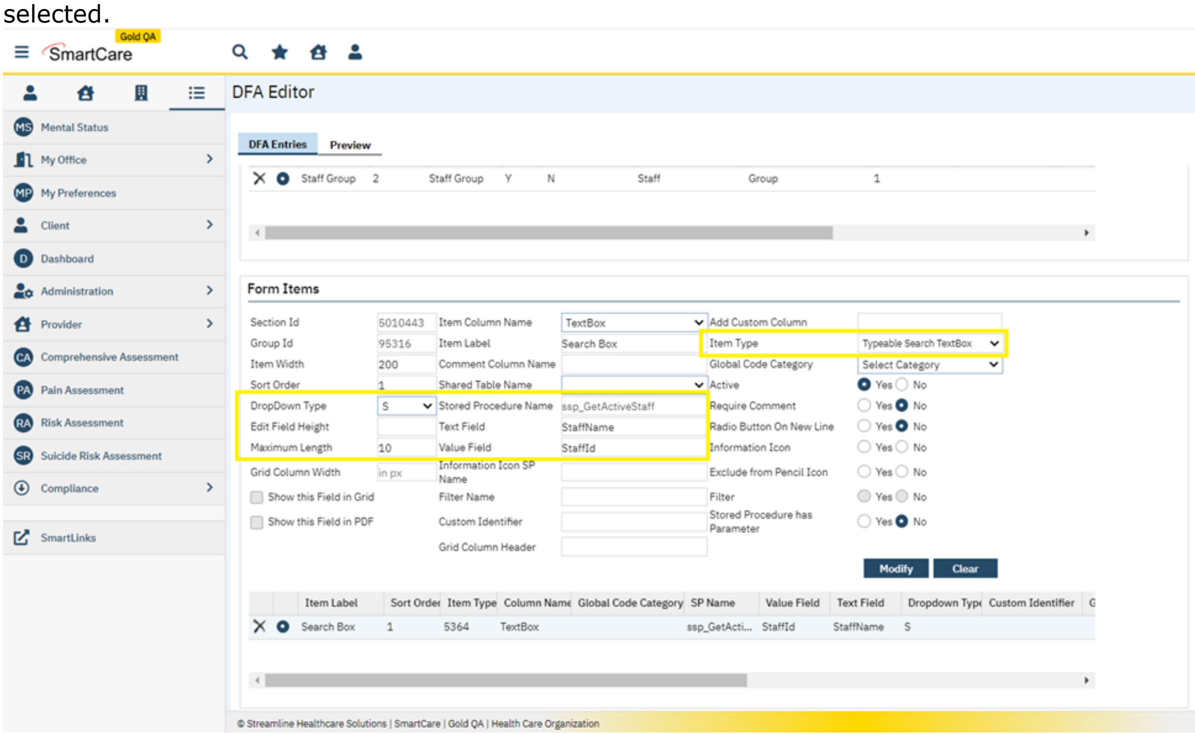
1. "Typeable Type Search Text Box" Item Type selected for DropDown Type 'G':When the 'DropDown Type' field is set to 'G' and 'Global Code Category' is selected.



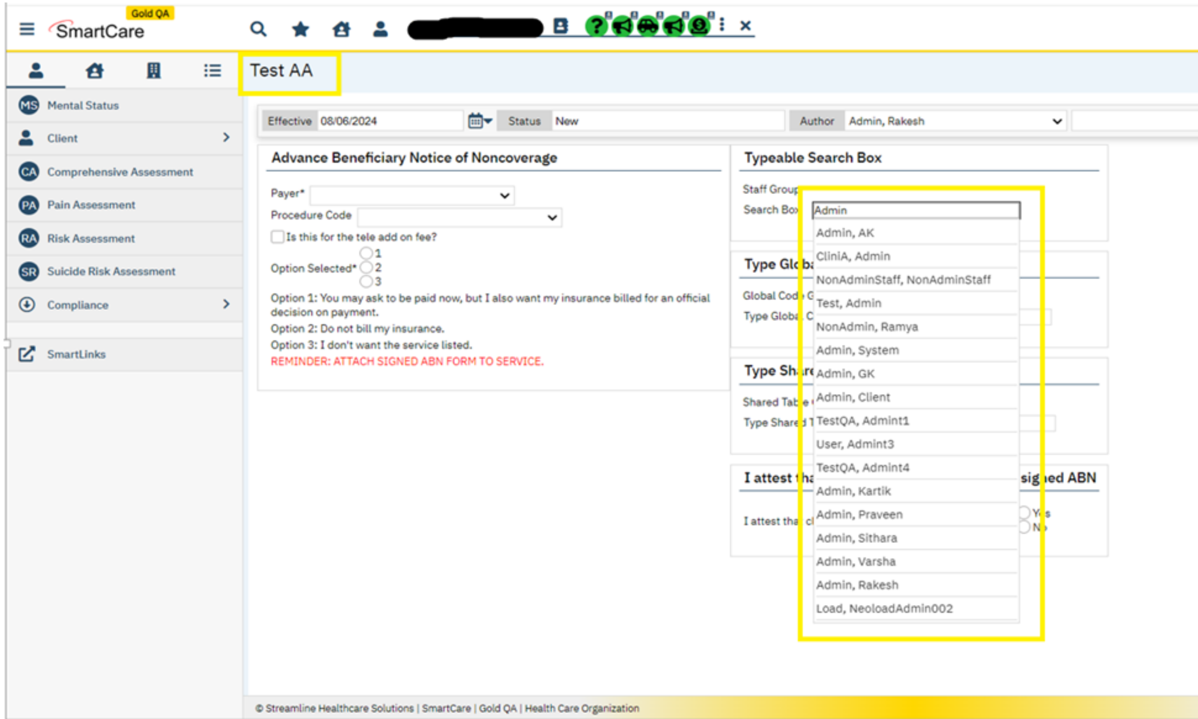
Values displaying in the Screen:



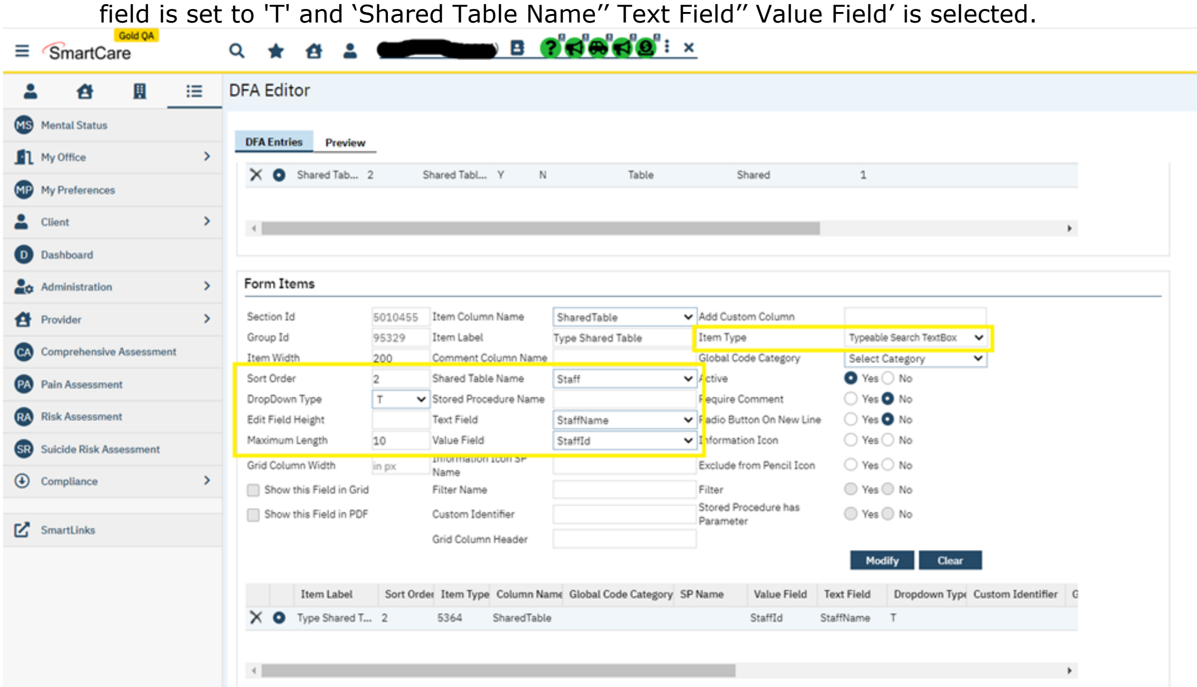
2. “Typeable Type Search Text Box” Item Type selected for DropDown Type ‘S’:When the 'DropDown Type' field is set to 'S' and ‘Stored Procedure Name’’ Text Field’’ Value Field’ is selected.



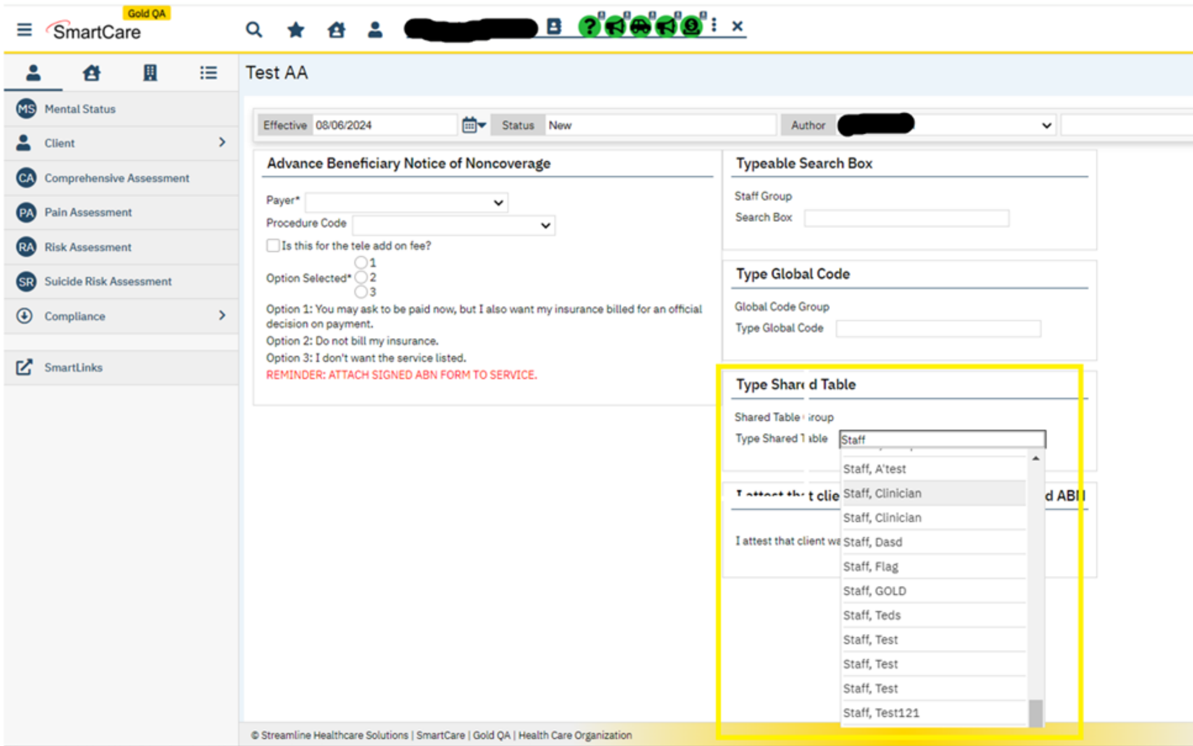
Values displaying in the Screen:



3. “Typeable Type Search Text Box” Item Type selected for DropDown Type ‘T’:When the 'DropDown Type' field is set to 'T' and ‘Shared Table Name” Text Field” Value Field’ is selected.



Values displaying in the Screen:



Documents

Reference No	Task No	Description
38	EII # 127596	Modify the Staff dropdown fields to Typeable Search textbox in the Document, Events and Service Note screen.
39	Core Bugs # 128244	Revert the "Risk and Protective Factors" tab changes with the previous version of the C-SSRS Assessments.
40	Core Bugs # 128486	Registration Document (C): Unable to create a second version.
41	EII # 128030	Implemented a New 'MDQ Assessment' document.
42	Core Bugs # 128295	USCDI Summary of Care PDF is not pulling expected data.
43	EII # 125503	Implementation to add SUD Check box in Document Signature Control.
44	Core Bugs # 128656	'IP Psychiatric Note' screen: A signed ICD code Diagnosis details were not initializing into 'Diagnosis' tab.
45	Core bugs # 128651	Error Message when signing NOMS.
46	Core bugs # 128702	'Release of Information' document: 'Release To/Release From' section fields are not initializing from 'Contacts' tab of 'Client Information C' screen.
47	Core bugs # 128552	Error message is displayed while opening the in-progress Care Plan.
48	EII # 127569	Implementation of document packets for the Programs in 'Registration' document.

49	EII # 128031	Implemented the HAM-D Assessment Document.
50	Core bugs # 126872	Documents: PDF is not generated.
51	EII # 128048	Implementation of the 'E-Mail' field in the 'Release of Information' Document.
52	EII # 127313	Added these Columns 'Sum20Ratings', 'AverageDLA', 'EstimateGAF', 'SeverityIndex' 'ChangeScore' and 'SeverityOfIllness' to the DocumentDailyLivingActivity20Scores table.
53	EII # 127338	Implementation of the 'Shift Notes' document.
54	EII # 128194	Implementation of new section in 'Release of Information' document.
55	Core bugs # 127484	Documents: Additional Version creating on clicking Multiple Times on sign button
56	Core bugs # 128629	Care Plan: The duplicate 'Interventions' in the 'Intervention' tab when the user created new plans.
57	Core bugs # 128648	History and Physical tab bug.
58	Core bugs # 128528	Individual Service Plan: Error message is displayed when accessing the screen.
59	Core bugs # 128598	National Outcome Measures (NOMs): Unable to insert Dx due to Error
60	EII # 126616	Implementation of a 'Typeable Search box' for the 'Author' dropdown field in the 'Document', 'Events', and 'Service Note' screens.
61	EII # 127345	Changes to the Treatment Team screens.

Author: Rakesh Naganagoda

38. EII # 127596: Modify the Staff dropdown fields to Typeable Search textbox in the Document, Events and Service Note screen.

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

Pre-requisites:

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

A) When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

B) When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. This will be the **default value of the key, as it drives the existing behavior**.

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., the same as the key value is "No".

Navigation Path 1: 'Client' -- Documents -- create new Document -- Sign the Document -- Co-signer Dropdown.

Navigation Path 2: 'Client' -- Services/ Notes -- click new icon – Enter all required details --Sign the Service Notes -- Co-signer Dropdown.

Navigation Path 3: 'Client' -- 'Events' -- Create new Event -- Sign the Event -- Co-signer Dropdown.

Navigation Path 4: 'Administration -- 'Configuration Keys' list page -- 'Configuration Key Details' screen.

Navigation Path 5: 'Administration– 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click the 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Purpose: To change the 'Staff' dropdown to a 'Typeable search box' for the 'Document' 'Events' Screen and 'Service Note' screen to improve the performance when there are large number of staff records.

With this release, the 'Co-Signer' dropdown field is changed to the 'Typeable Search textbox' in the 'Document', 'Events', and the 'Services Note' screen. When System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes', the above-mentioned Co-Signer dropdown will be displayed as Typeable search textboxes.

The below-mentioned permission type is applied to display the values in the typeable search text staff fields for the Co-Signer dropdown of the 'Document' 'Events' screen and the 'Service Note' screen.

Permission Type: StaffAccessRules

Permission Item:

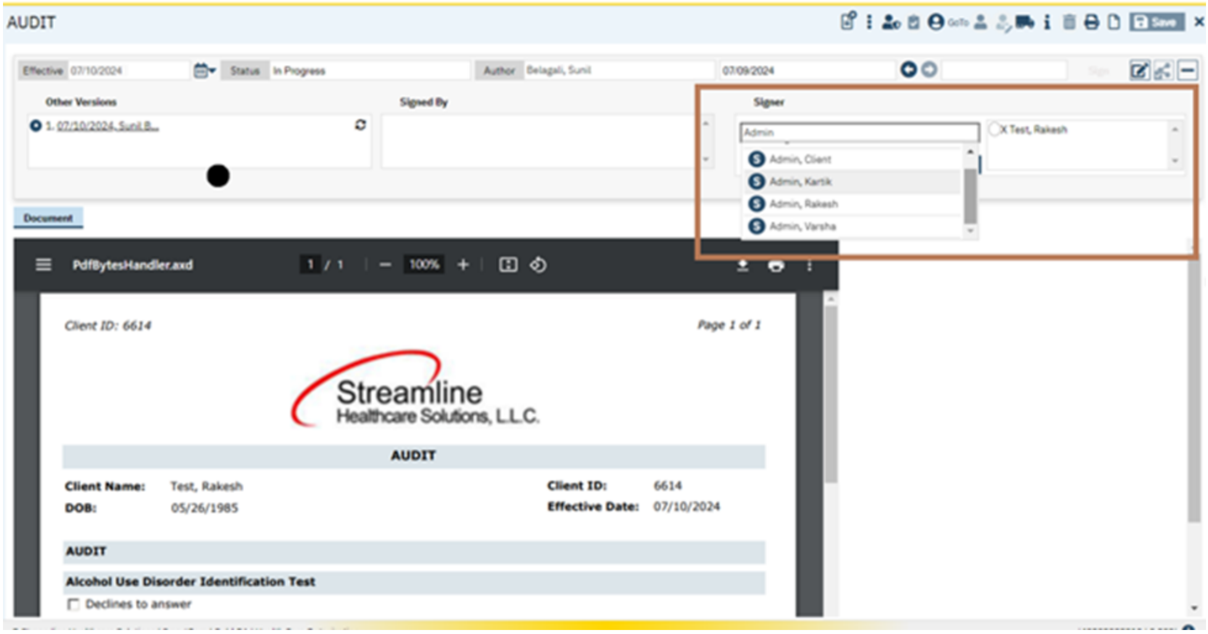
- AllStaff
- LimitedStaff

a) If the logged in staff has "LimitedStaff" Access Rule, then the typeable search text box displays the staff who is associated with any of the Program that the logged in staff is also associated with.

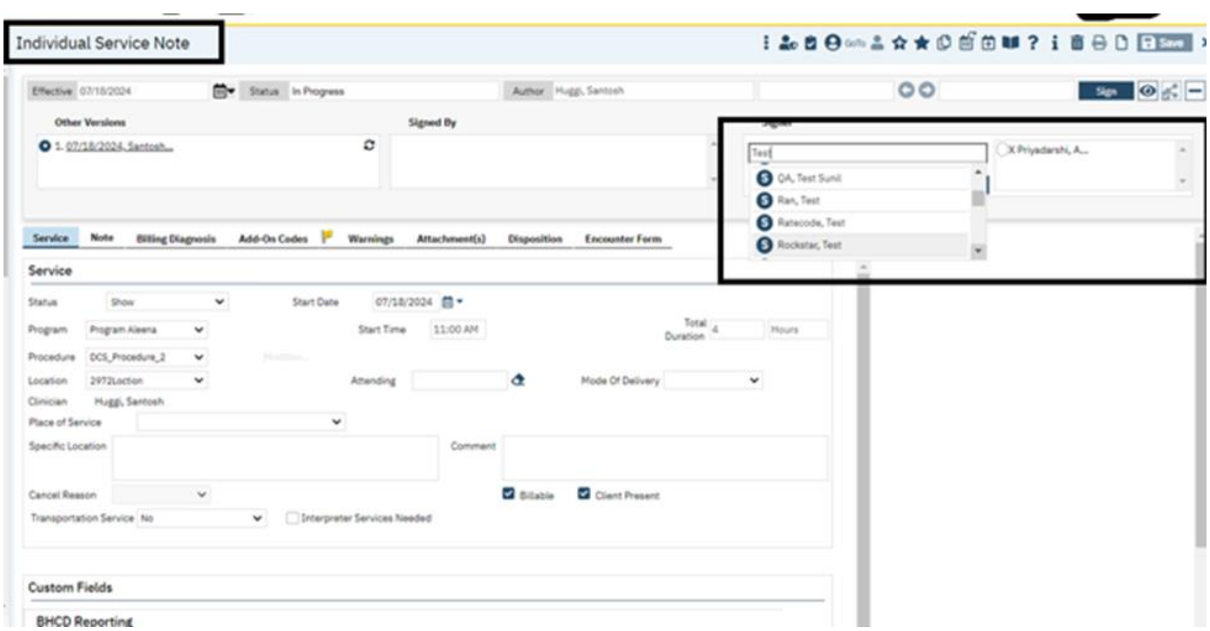
b) If the logged in staff has "AllStaff" Access Rule, then the SmartCare will display all the staff in the typeable search textbox.

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

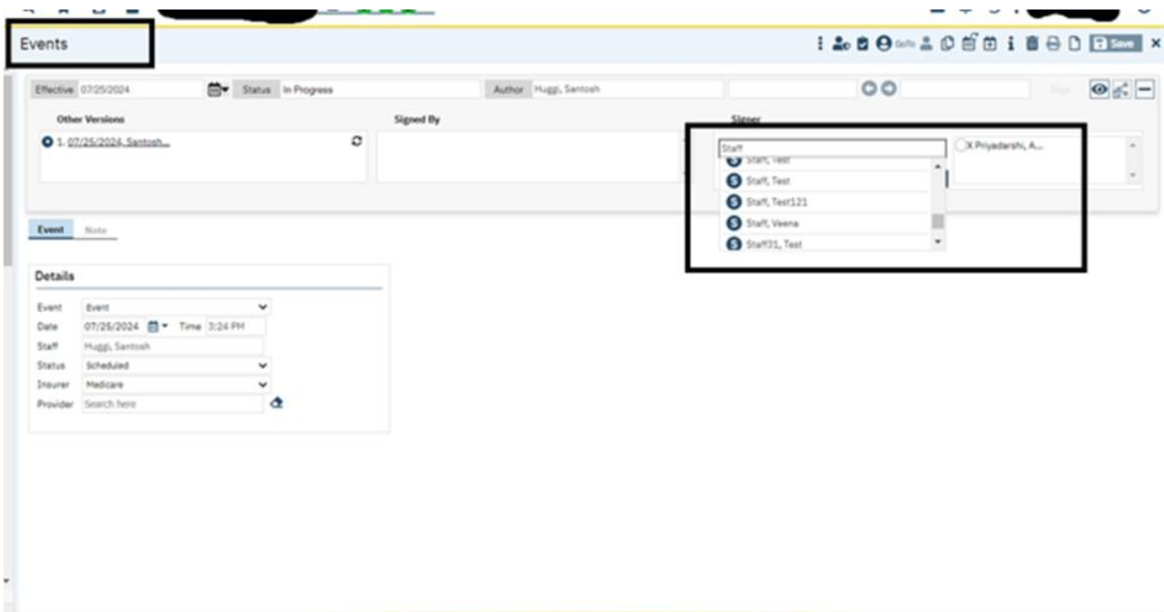
'Document' Screen for All Staff:



'Service Note' Screen:



'Events' Screen:


Events
Save
Effective 07/25/2024
Status In Progress
Author Huggi, Santosh
Other Versions
1. 07/25/2024 Santosh...
Signed By
Signer
Staff
Staff, Test
Staff, Test121
Staff, Veena
Staff31, Test
X Priyadarshi, A...
Event
Note
Details
Event Event
Date 07/25/2024 Time 3:24 PM
Staff Huggi, Santosh
Status Scheduled
Insurer Medicare
Provider Search here

Author: Sachin Ranganathappa

39. Core bugs #128244: Revert the "Risk and Protective Factors" tab changes with the previous version of the C-SSRS Assessments.

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

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

Navigation Path 1: 'Client' – 'Documents' – 'C-SSRS Adult Assessment' screen – 'Risk and Protective Factors' tab.

Navigation Path 2: 'Client' – 'Documents'– 'C-SSRS Adult Since Last Visit' screen – 'Risk and Protective Factors' tab.

Navigation Path 3: 'Client' – 'Documents' – 'C-SSRS Children's Baseline Screening' screen – 'Risk and Protective Factors' tab.

Navigation Path 4: 'Client' – 'Documents' – 'C-SSRS Pediatric Since Last Visit' screen – 'Risk and Protective Factors' tab.

Functionality 'Before' and 'After' release:

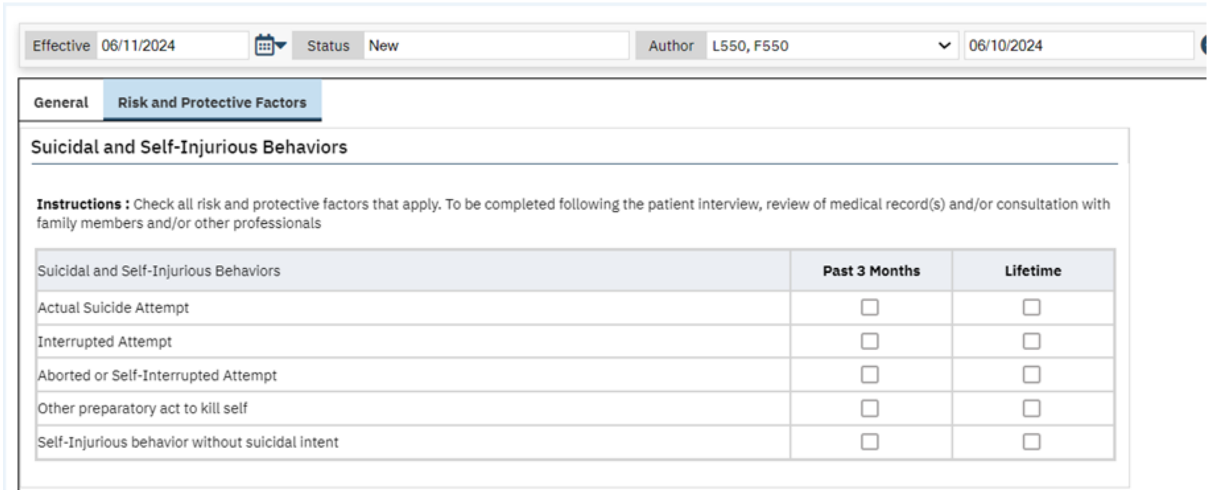
Before this release, here was the behavior. This Standalone Document 'C-SSRS Risk Assessment (Lifeline) v3' has 'C-SSRS Risk Assessment (Lifeline) v3' tab and the data from 'C-SSRS Risk Assessment (Lifeline) v3' tab fields are initializations for the below screens:

- C-SSRS Adult Assessment
- C-SSRS Adult Since Last Visit
- C-SSRS Children's Baseline Screening
- C-SSRS Pediatric Since Last Visit.

With this release, the "C-SSRS Risk Assessment (Lifeline) v3" tab is replaced with "Risk and Protective Factors" tab and the data from 'this tab's fields are initialized to the below screens:

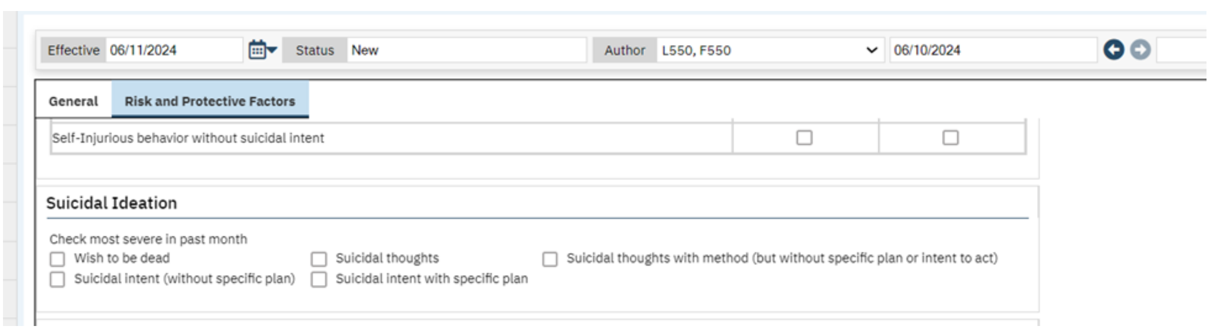
- C-SSRS Adult Assessment
- C-SSRS Adult Since Last Visit
- C-SSRS Children's Baseline Screening
- C-SSRS Pediatric Since Last Visit.

'Risk and Protective Factors' tab which contains the below sections with respective fields.



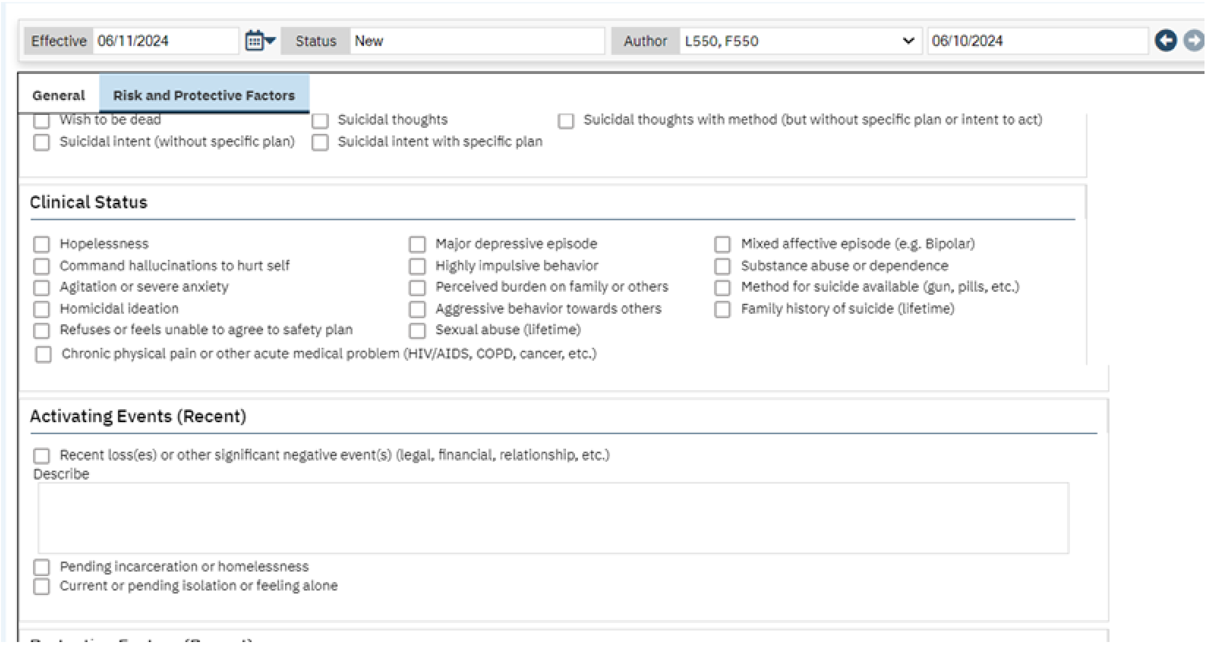
Suicidal and Self-Injury Behavior: this section contains the label and grid with respective checkbox option-

- **Instructions:** Check all risk and protective factors that apply. To be completed following the patient interview, review of medical record(s) and/or consultation with family members and/or other professionals.
- The grid which contains the below headers listed horizontally:
    - Suicidal and Self-Injury Behaviors
    - Past 3 Months
    - Lifetime
- **Suicidal and Self-Injury Behaviors header**: This will contain list of fields which is associated with respective checkbox:
    - Actual suicide attempt
    - Interrupted attempt
    - Aborted or Self-Interrupted Attempt
    - Other preparatory act to kill self
    - Self-Injurious behavior without suicidal intent



Suicidal Ideation section: This section will contain "Check most severe in past month" as a label and below listed checkbox response option with enable mode.

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



Clinical Status section: This section will contain the below checkbox response option with enable mode.

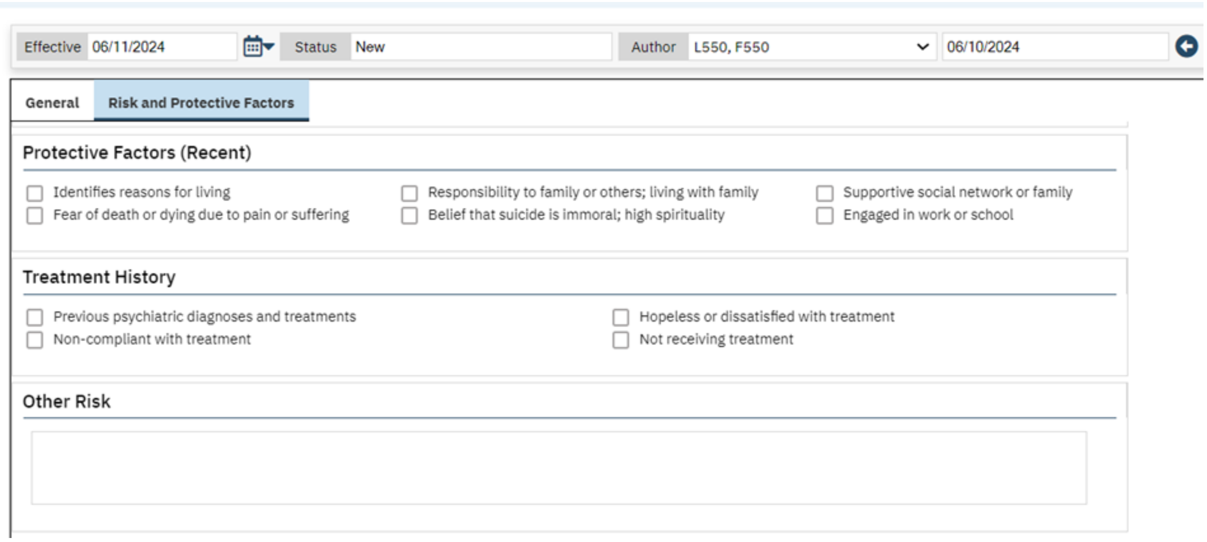
- Hopelessness
- Major depressive episode
- Mixed affective episode (e.g., Bipolar)
- Command hallucinations to hurt self.
- Highly impulsive behavior
- Substance abuse or dependence
- Agitation or severe anxiety
- Perceived burden on family or others
- Method for suicide available (gun, pills, etc.)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

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

- Recent loss(es) or other significant negative event(s) (legal, financial, relationship, etc.)
- Pending incarceration or homelessness
- Current or pending isolation or feeling alone.

Describe field: This is a text area field.

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

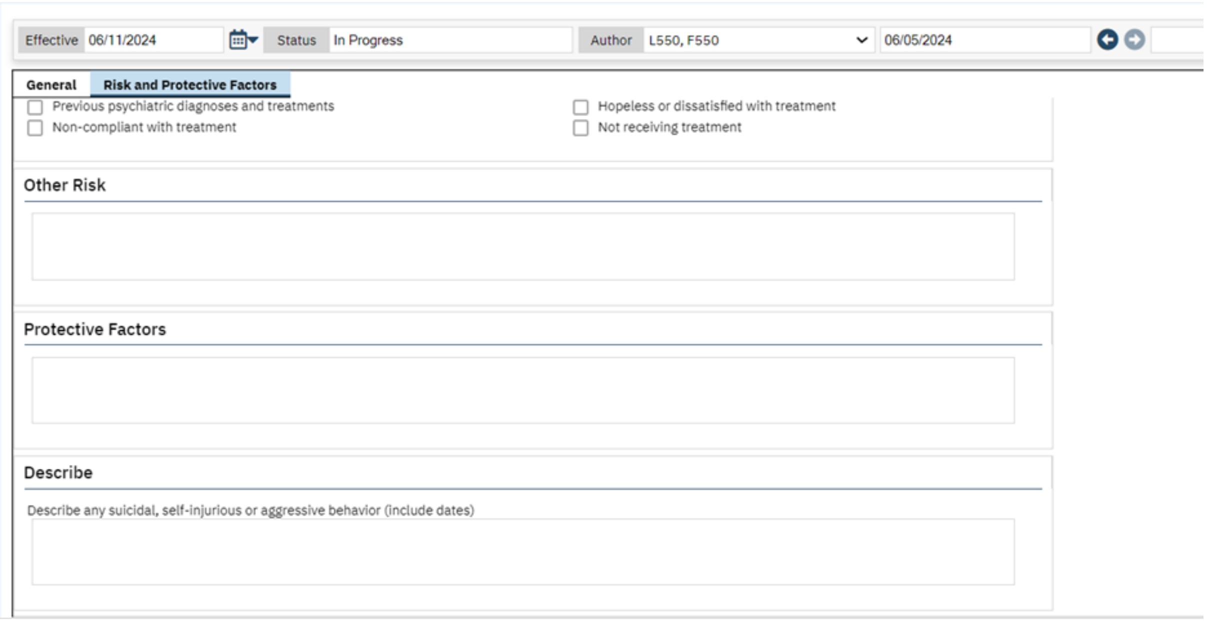


- Identifies reasons for living.
- Responsibility to family or others; living with family.
- Supportive social network or family
- Fear of death or dying due to pain or suffering
- Belief that suicide is immoral; high spirituality
- Engaged in work or school.

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

- Previous psychiatric diagnoses and treatments
- Hopeless or dissatisfied with treatment.
- Non-compliant with treatment
- Not receiving treatment

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



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

Describe section: This section will contain the text area field.

- Describe any suicidal, self-injurious or aggressive behavior (include dates)**:** this is Text will be available above the text area field.

Author: Akshay Vishwanath

40. Core bugs # 128486: Registration Document (C): Unable to create a second version.

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

Prerequisite: Client has an episode created through the below **path:**

'Client' -- 'Client Information(c)' -- 'Client Episodes' Tab -- Insert the Episode.

Navigation Path: 'Client' -- 'Registration' Document.

Functionality 'Before' and 'After' release:

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

1: If a client had an open episode and when the user tried to open the Registration document, below mentioned error message was displayed.

2: If a client has a 'Registration' document that is in 'In progress' status and an episode is created through 'Client Information' screen, and when the user tries to sign the Registration document, the following error message was displayed.

3: When user tries to Validate/Sign the edited 'Registration' document, the following error message was displayed.

Error: 'Cannot create a registration document. An Episode is already in progress for this member.'

With this release, the above-mentioned issues have been resolved. A configuration key 'DisplayOpenEpisodeValidationIfTheClientDoesNotHaveASignedRegistrationDocument' has been implemented. Now when there is an open episode for a client created through Client information screen, the user will be able to sign the 'Registration' document without the validation message being displayed.

Configuration key Details:

System Config Key: DisplayOpenEpisodeValidationIfTheClientDoesNotHaveASignedRegistrationDocument

Read Key as: Display open episode validation if the client does not have a signed registration document.

Allowed Values: Yes, No

Default Value: No

Modules: SCM Client Intake

Description: This configuration key is used to display the open episode validation to avoid creating a new registration document if the client already has a signed registration document or an open episode. This ensures that the new registration document does not override the registration date of the existing open episode.

- If this key value is set to "Yes", then system will show the existing behaviour. i.e the Validation is displayed on document creation: "Cannot create a Registration document. An Episode is already in progress for this member." This validation appears on creation of Registration document, if the client record has another signed Registration Document.

- If this key value is set with "No", then the Registration Document (core) Overwrites the Client Episode Registration Date if Client Already has Open Episode.

  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 behaviour, i.e., same as the key value being "No".**

Author: Sachin Ranganathappa

41. EII # 128030: Implemented a New 'MDQ 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: New **| Priority:** On Fire

Navigation Path: 'Client' search - 'Documents' list page – 'MDQ Assessment' document.

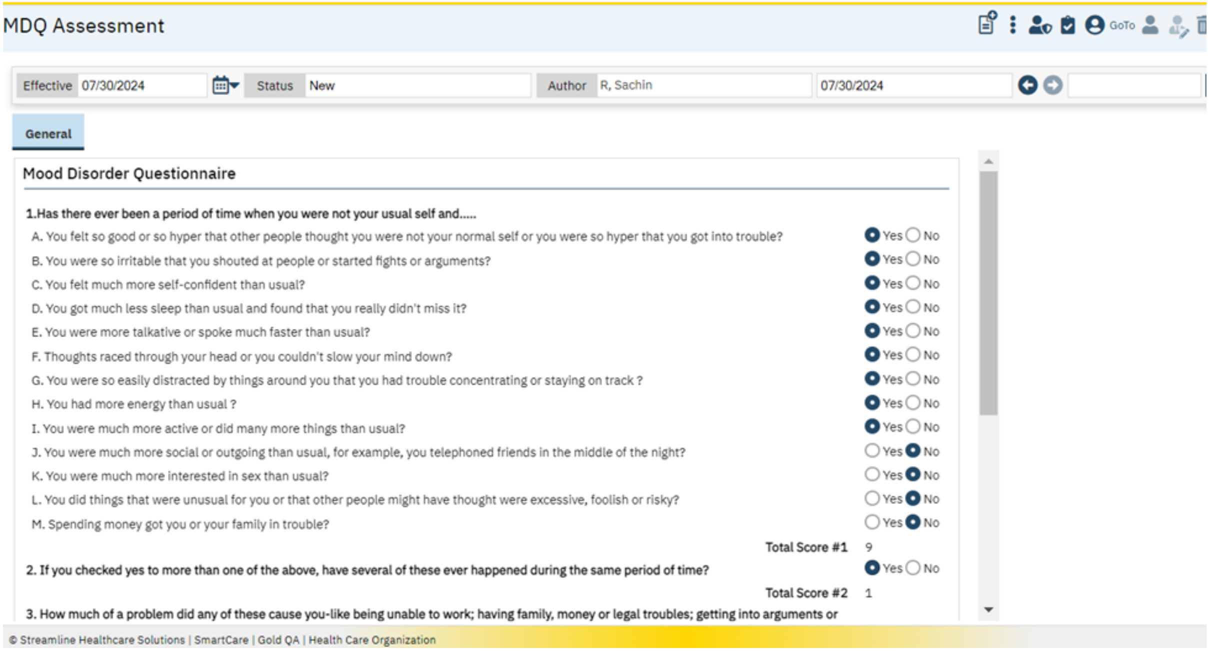
Functionality 'Before' and 'After' release:

Purpose: The new 'MDQ (Mood Disorder Questionnaire) Assessment' document is implemented to capture Mood Disorder related information of the Patient.

With this release, a new 'MDQ Assessment' document has been implemented with the required fields as mentioned below.

1. General Tab:

In the 'MDQ Assessment' screen, the below-mentioned A-M Questions are displayed with 'Yes' and 'No' radio buttons:



'Mood Disorder Questionnaire' section:

1. Has there ever been a period of time when you were not your usual self and.....

A. You felt so good or so hyper that other people thought you were not your normal self or you were so hyper that you got into trouble?
B. You were so irritable that you shouted at people or started fights or arguments?
C. You felt much more self-confident than usual?
D. You got much less sleep than usual and found that you really didn't miss it?
E. You were more talkative or spoke much faster than usual?
F. Thoughts raced through your head or you couldn't slow your mind down?
G. You were so easily distracted by things around you that you had trouble concentrating or staying on track ?
H. You had more energy than usual ?
I. You were much more active or did many more things than usual?
J. You were much more social or outgoing than usual, for example, you telephoned friends in the middle of the night?
K. You were much more interested in sex than usual?
L. You did things that were unusual for you or that other people might have thought were excessive, foolish or risky?
M. Spending money got you or your family in trouble?

Total Score #1 - The total score will be displayed based on the radio button selected from question A-M (the total score will be calculated and displayed when the user selects the 'Yes' radio button for the above questions).

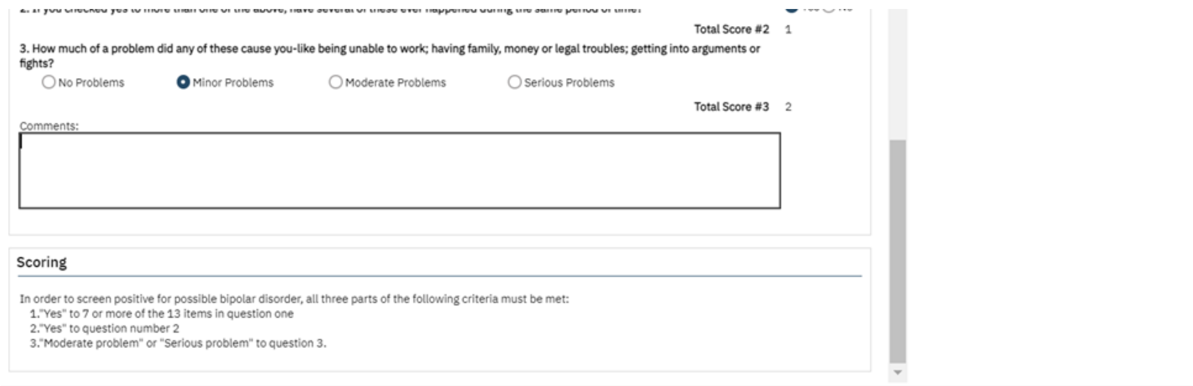
2. **If you checked yes to more than one of the above, have several of these ever happened during the same period of time?** Radio button with 'Yes' and 'No' options.

Total Score #2 - The total score will be displayed based on the radio button (the Total score will display as '1' if the user selects the 'Yes' radio button and '0' if the user selects the 'No' radio button).

3. How much of a problem did any of these cause you-like being unable to work; having family, money or legal troubles; getting into arguments or fights? – This is the radio button with below radio options:

a. No Problems
b. Minor Problems
c. Moderate Problems
d. Serious Problems

Total Score #3 - The total score is displayed based on the above radio button selection (the Total score will be '1' – if the user selects the '**No Problems**' radio button', score is '2' – if the user selects '**Minor Problems**' radio button', the score is '3'- if the user selects the '**Moderate Problems**' radio button', score is '4- if the user selects the '**Serious Problems**' radio button').



2. 'Comments' Section: This is a Text field where the user can enter the comments.

3. 'Scoring' Section –

In order to screen positive for possible bipolar disorder, all three parts of the following criteria must be met:

1."Yes" to 7 or more of the 13 items in question one

- The total score will be calculated and displayed when the user selects the 'Yes' radio button for the questions #1.

2."Yes" to question number 2

- The total score will be calculated and displayed when the user selects the 'Yes' radio button for the questions #2

3."Moderate problem" or "Serious problem" to question 3.

- The total score is displayed based on the above radio button selection for the questions #3

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

PDF screenshot:

Client Name: 3609 Test

Client ID: 1051

Page 1 of 2

MDQ Assessment

Client Information

Client Name:	Test, 3609	**Client ID:**	1051
DOB:	01/01/1998	**Effective Date:**	08/12/2024

MDQ-General

Mood Disorder Questionnaire

1. Has there ever been a period of time when you were not your usual self and...	
A.You felt so good or so hyper that other people thought you were not your normal self or you were so hyper that you got into trouble?	NO
B. You were so irritable that you shouted at people or started fights or arguments?	NO
C. You felt much more self-confident than usual?	NO
D. You got much less sleep than usual and found that you really didn't miss it?	NO

B. You were so irritable that you shouted at people or started fights or arguments? NO
C. You felt much more self-confident than usual? NO
D. You got much less sleep than usual and found that you really didn't miss it? NO

E. You were more talkative or spoke much faster than usual?	NO
F. Thoughts raced through your head or you couldn't slow your mind down?	NO
G.You were so easily distracted by things around you that you trouble concentrating or staying on track?	NO
H. You had more energy than usual?	Yes
I.You were much more active or did many more things than usual?	Yes
J.You were much more social or outgoing than usual, for example, you telephoned friends in the middle of the night?	Yes
K.You were much more interested in sex than usual?	Yes
L.You did things that were unusual for you or that other people might have thought were excessive, foolish or risky?	Yes
M.Spending money got you or your family in trouble?	NO
2. If you checked yes to more than one of the above, have several of these ever happened during the same period of time?	NO

2. If you checked yes to more than one of the above, have several of these ever happened during the same period of time? NO

3. How much of problem did any of these causes you-like being unable to work; having family, money or legal troubles; getting into arguments or fights?

Minor Problems

Comments

ffffff

Scoring

In order to screen positive for possible bipolar disorder, all three parts of the following criteria must be met:

1. "Yes" to 7 or more of the 13 items in Question 1	5
2. "Yes" to Question number 2	0
3. "Moderate Problem" or "Serious Problem" to Question 3	2

Client Name: 3609 Test

Client ID: 1051 *Page 2 of 2*

Clinician: Sachin R, Bachelor of Science **Signature Date:** 08/12/2024 11:36AM

Data Model Change:

Core table "documentmooddisorderquestionnaires" is created.

Author: Sithara Ponnath

42. Core bugs # 128295: USCDI Summary of Care PDF is not pulling expected data.

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

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

Prerequisites: Diagnosis document is signed**.**

Navigation Path: Select Client - Select USCDI Summary of Care document - Select 'All information' or 'Acknowledgement of treatment' radio button in the What information will be included section-Click on save button - Click on 'View' PDF icon - Click on 'Save/Sign' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'USCDI Summary of Care' PDF document was not pulling expected data from the following screens,

- Client Information
- Current Diagnosis/Problem List

With this release, the above-mentioned issue is resolved. Now, the 'Client Information' and 'Current Diagnosis/Problem List' data is displayed in the 'USCDI Summary of Care' PDF document.

Author: Kiran Tigarimath

43. EII # 125503: Implementation to add SUD Check box in Document Signature Control.

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. The System configuration key "DisplayCDAGSectionInStaffDetails" is set to 'Yes' using the path 'Administration' – 'Configuration Keys' screen.

2. The System configuration key 'EnableClinicalDataAccessGrouping' is set to 'Yes' using the path 'Administration' – 'Configuration Keys' screen.

3. The System configuration key 'DisplaySUDCheckboxToTagDataAsSUD' is set to 'Yes' using the path 'Administration' – 'Configuration Keys' screen.

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

Navigation Path 2: 'Client' – 'Services/Notes'.

Navigation Path 3: 'Client' – 'Events'.

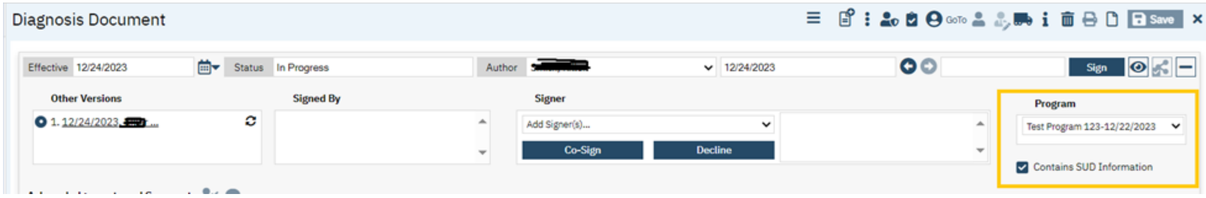
Functionality 'Before' and 'After' release:

With this release, the 'Contains SUD Information' check box is implemented along with below-mentioned functionalities in Document Signature Control in the Documents, Service Notes and Events screen.

1. The check box 'Contains SUD Information' will be displayed in Document Signature Control of Documents, Service Notes and Events when the configuration key 'DisplaySUDCheckboxToTagDataAsSUD 'set to 'Yes'.

2. When 'EnableClinicalDataAccessGrouping' configuration key set to 'Yes' (CDAG is on), and the selected program is marked as SUD in 'Programs' screen, automatically the 'Contains SUD Information' check box will be checked. When the selected program is not marked as SUD, then check box 'Contains SUD Information' will be unchecked in Document Signature control of Documents and Service Notes.

Check box checked when selected program is SUD.



Check box is unchecked when selected program is not SUD.

4. The check box will be enabled all the time until the Document, Service Notes status is signed. When the document is to be reviewed by other staff, then the check box will be enabled for both reviewer and author.

   Note:

   1. Program drop down will not display in Events screen for both CDAG 'On' and 'Off'.

   2. When the configuration key 'EnableClinicalDataAccessGrouping' (CDAG) set to 'No',
      - The program drop down will not be displayed for Documents.
      - Only in Service Notes, 'Contains SUD Information' check box is displayed and properly aligned.

Author: Savitha Siddaraju

44. Core bugs # 128656: 'IP Psychiatric Note' screen: A signed ICD code Diagnosis details were not initializing into 'Diagnosis' tab.

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

Navigation Path 1: 'Client' - 'Diagnosis' screen - Add ICD code Diagnosis - Enter all the required details - Sign the document.

Navigation Path 2: 'Client' - 'IP Psychiatric Note' screen - 'Diagnosis' tab - 'Diagnosis' section - 'Diagnosis list' view.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user signed the diagnosis document, the signed ICD code Diagnosis details were not initialized into the 'Diagnosis' tab of 'IP Psychiatric Note' screen.

With this release, the above-mentioned issue has been resolved. Now, the signed ICD code Diagnosis details are initializing into the 'Diagnosis' tab of 'IP Psychiatric Note' screen.

Author: Praveen Gangadhara

45. Core bugs # 128651: Error Message when signing NOMS.

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

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

Prerequisite: Sign the Diagnosis document with any ICD code that belongs to NOMS document.

Navigation Path: Go Search - Client – Documents - NOMS (Core) - New – Enter mandatory details – Navigate to 'Diagnosis' tab and select 'No Diagnosis' – Sign the document.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When the user tried to sign the NOMS document on checking 'No Diagnosis' check box, the below error was displayed.

Error message: *'Column 'ProgramId' does not belong to table DocumentDiagnosisCodes'*

With this release, the above-mentioned issue has been resolved. Now, the user can sign NOMS document without any error on checking the 'No Diagnosis' check box.

Author: Ramya Nagaraj

46. Core bugs # 128702: 'Release of Information' document: 'Release To/Release From' section fields are not initializing from 'Contacts' tab of 'Client Information C' screen.

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

Navigation Path: 'Client' -- 'Release of Information' document.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Few fields like 'Organization', 'Name', 'Address', 'City', 'Phone', State', 'Zip' and 'Fax Number' in 'Release To/Release From' section of 'Release of Information' document were not initialized from 'Contacts' tab of 'Client Information C' screen.

With this release, the above-mentioned issue has been resolved. Now, the above fields are being initialized from 'Contacts' tab of 'Client Information C' screen into 'Release of Information' document.

Author: Kiran Tigarimath

47. Core bugs # 128552: Error message is displayed while opening the in-progress Care Plan.

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

Navigation Path: Go search-Client- Care Plan document - Enter all the required fields-Click on save.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. When the user tried to open the in-progress care plan document, an error message was getting displayed.

Error Message: 207*****Invalid column name 'DocumentVersionId'. *****ssp_SCGetDocumentDetails*****2*****16*****1

With this release, the above-mentioned issue has been resolved. Now, error message is not getting displayed when user opens the in progress Care Plan document.

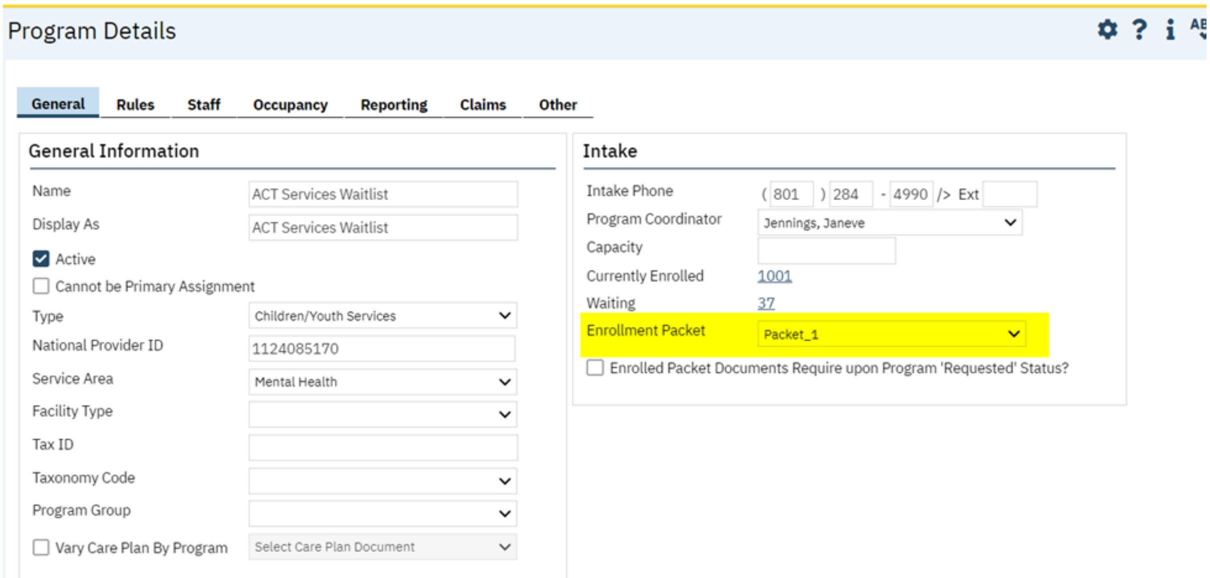
Author: Praveen Gangadhara

48. EII # 127569: Implementation of document packets for the Programs in 'Registration' document.

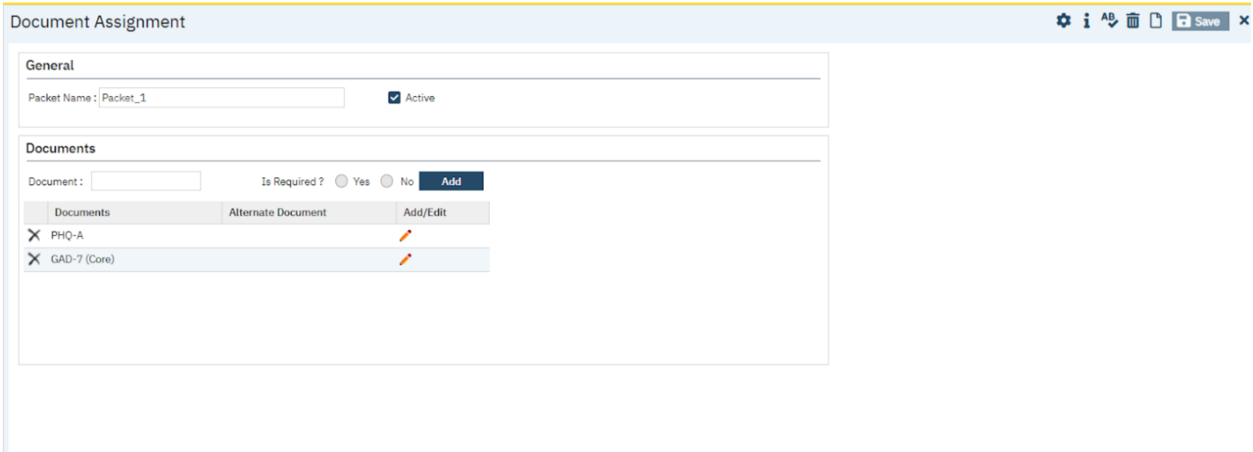
Release Type: Change | **Priority:** Urgent

Prerequisites:

a) In the Program details, select the packet in the 'Enrolled packet' field for the selected Programs.



b) Set the document packet value in the 'SetDefaultDocumentPacketIDInRegistration' configuration key.
c) Create a packet in the Document Assignment details screen and add the required documents under the packet.



Navigation Path: 'Client' – 'Documents' – Registration Document(C) – Navigate to 'Program Enroll' tab and select the program mentioned in Pre-requisites – Navigate to 'Forms and Agreement' tab.

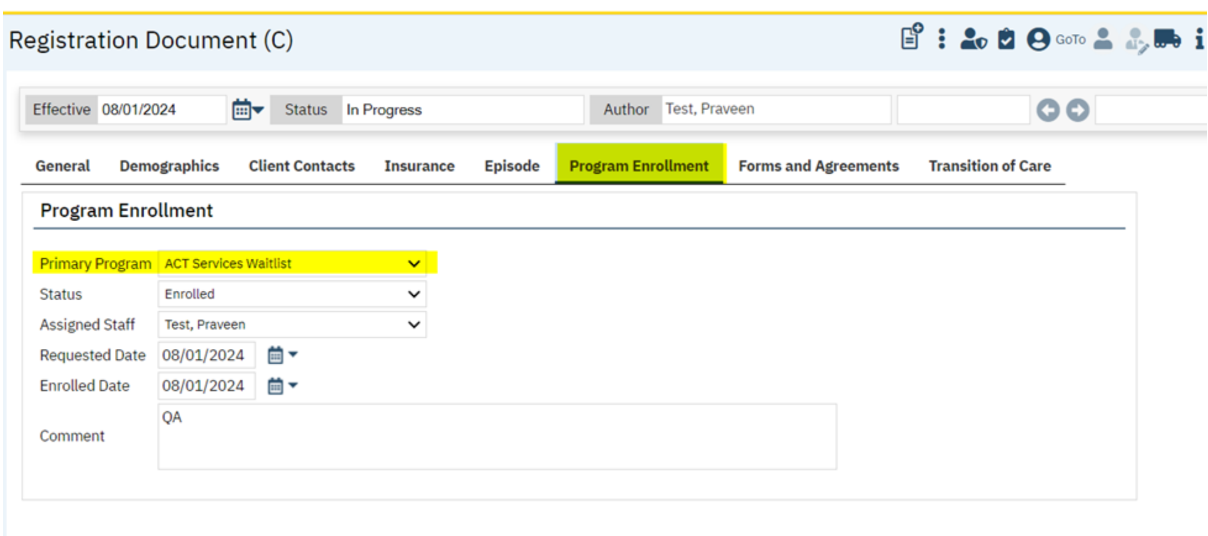
Functionality 'Before' and 'After' release:

Purpose: The users want to use both the configuration key packet, and the program assigned packet with the Registration Document.

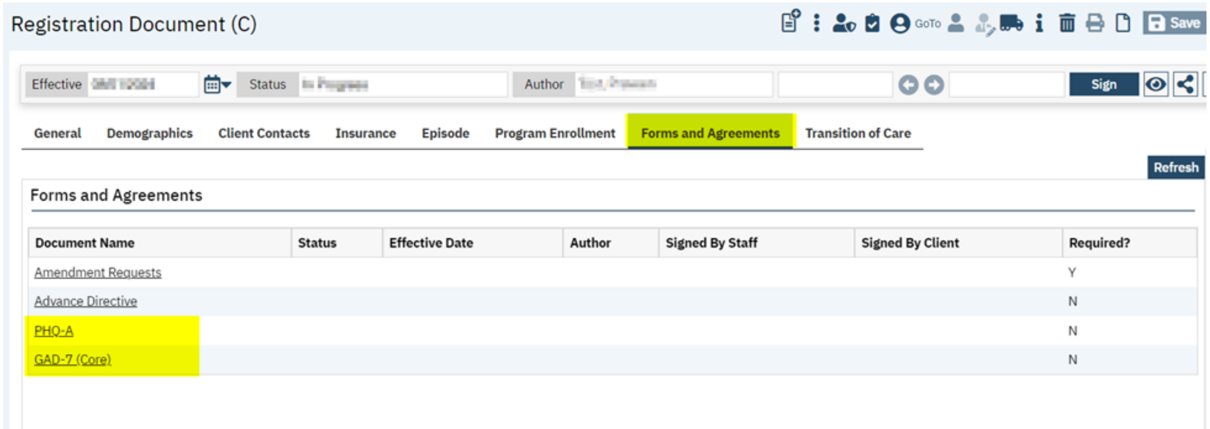
Before this release here was the behavior. In the Registration document(C), based on the PacketID set in the 'SetDefaultDocumentPacketIDInRegistration' configuration key, the documents were displayed in the 'Forms and Agreement' tab.

With this release, the above-mentioned issue has been resolved. Now, in the 'Registration Document(C)', when the user selects the program mentioned in the prerequisite in the 'Primary Program' drop down field of 'Program enrolment tab, then list of the document packets will display along with the default document Packets.

In Registration Document – Assign program:



In 'Forms and Agreements' tab – based on the selected program new document packets got added.



Author: Sachin Ranganathappa

49. EII # 128031: Implemented the HAM-D 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: Change **|** **Priority:** On Fire

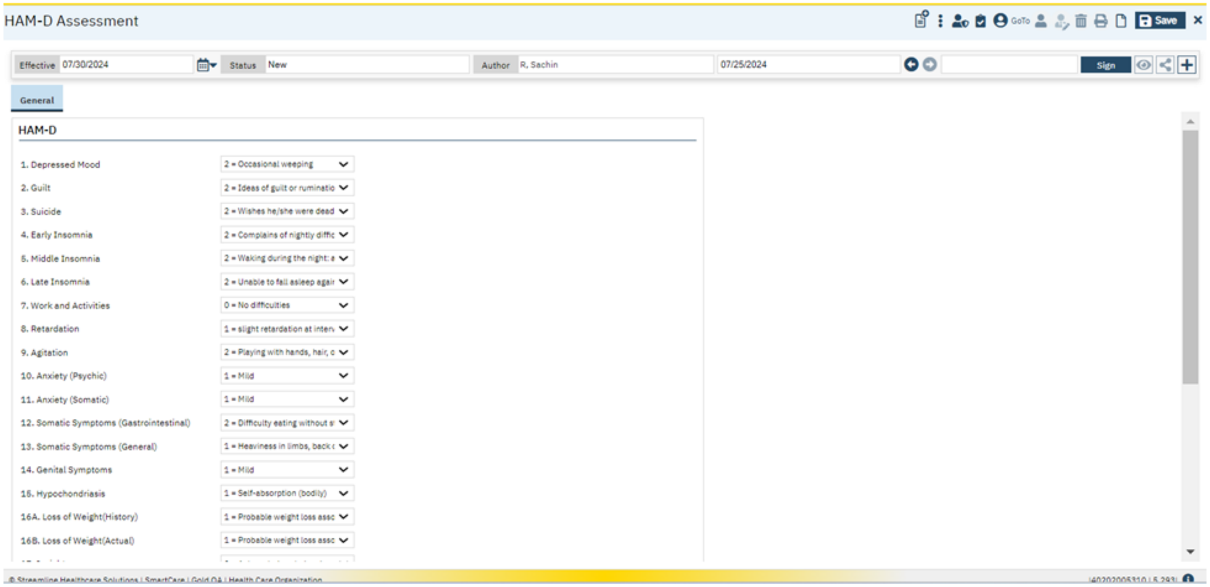
Navigation Path: 'Client' search - 'Documents' list page – 'HAM-D Assessment' (Hamilton Depression Scale) document.

Functionality 'Before' and 'After' release:

With this release, a new 'HAM-D Assessment' document screen has been implemented with the required fields as mentioned below.

The 'HAM-D Assessment' document is displayed with the General tab.

The General tab in the 'HAM-D Assessment' screen is displayed with the below mentioned dropdown lists:
HAM-D section:



1. Depressed Mood: This is a drop-down field and displayed with following values:
    - 0 = Absent
    - 1 = Gloomy attitude, pessimism, hopelessness
    - 2 = Occasional weeping
    - 3 = Frequent weeping
    - 4 = Patient reports virtually only those feelings states in his/her spontaneous verbal and non-verbal communication
2. Guilt: This is a drop-down field and displayed with following values:
    - 0 = Absent
    - 1 = Self-reproach, feels he/she has let people down
    - 2 = Ideas of guilt or rumination over past errors or sinful deeds
    - 3 = Present illness is punishment
    - 4 = Hears accusatory or denunciatory voices and/or experiences, threatening visual hallucinations, delusions of guilt
3. Suicide: This is a drop-down field and displayed with following values:
    - 0 – Absent
    - 1 = Feels life is not worth living
    - 2 = Wishes he/she were dead or any thoughts of possible death to self
    - 3 = Suicide, ideas or half-hearted attempt
    - 4 = Attempts at suicide (any serious attempt rates 4)
4. Early Insomnia: This is a drop-down field and displayed with following values:
    - 0 = No difficulty falling asleep
    - 1 = Patient complains of occasional difficulty falling asleep, i.e., more than ½ hour
    - 2 = Complains of nightly difficulty falling asleep
5. Middle Insomnia: This is a drop-down field and displayed with following values:

- 0 = No difficulty
- 1 = Patient complains of being restless and disturbed during the night
- 2 = Waking during the night: any getting out of bed rates 2 (except for voiding)

6. Late Insomnia: This is a drop-down field and displayed with following values:

- 0 = No difficulty
- 1 = Waking in early hours of the morning but goes back to sleep
- 2 = Unable to fall asleep again if he/she gets out of bed

7. Work and Activities: This is a drop-down field and displayed with the following values:

- 0 = No difficulties
- 1 = Thoughts and feelings of incapacity related to activities, work and hobbies
- 2 = Loss of interest in activity, hobbies or work either directly reported by patient, or indirectly seen in listlessness, indecision and vacillation (feels he/she has to push self to work or activities)

8. Retardation: This is a dropdown field and displayed with the following values:

- 0 = Normal speech and thought
- 1 = slight retardation at interview
- 2 = Obvious retardation at interview
- 3 = Interview difficult
- 4 = Interview impossible

9. Agitation: This is a dropdown field and displayed with the following values:

- 0 = None
- 1 = Fidgeting
- 2 = Playing with hands, hair, obvious restlessness
- 3 = Moving about, can't sit still
- 4 = Hand wringing, nail biting, hair pulling, biting of lips, patient is 'on the run'

10. Anxiety (Psychic): This is a dropdown field and displayed with the following values:

- 0 = Absent
- 1 = Mild
- 2 = Moderate
- 3 = Severe
- 4 = Incapacitating

11. Anxiety (Somatic): This is a dropdown field and displayed with the following values:

- 0 = Absent
- 1 = Mild
- 2 = Moderate
- 3 = Severe
- 4 = Incapacitating

12. Somatic Symptoms (Gastrointestinal): This is a dropdown field and displayed with the following values:

- 0 = None

- 1 = Loss of appetite but eating without staff encouragement
- 2 = Difficulty eating without staff urging. Requests or requires laxatives or medications for GI symptoms.

13. Somatic Symptoms (General): This is a dropdown field and displayed with the following values:

- 0 = None
- 1 = Heaviness in limbs, back or head, backaches, headaches, muscle aches, loss of energy, fatigability
- 2 = Any clear-cut symptom rates 2

14. Genital Symptoms: This is a dropdown field and displayed with the following values:

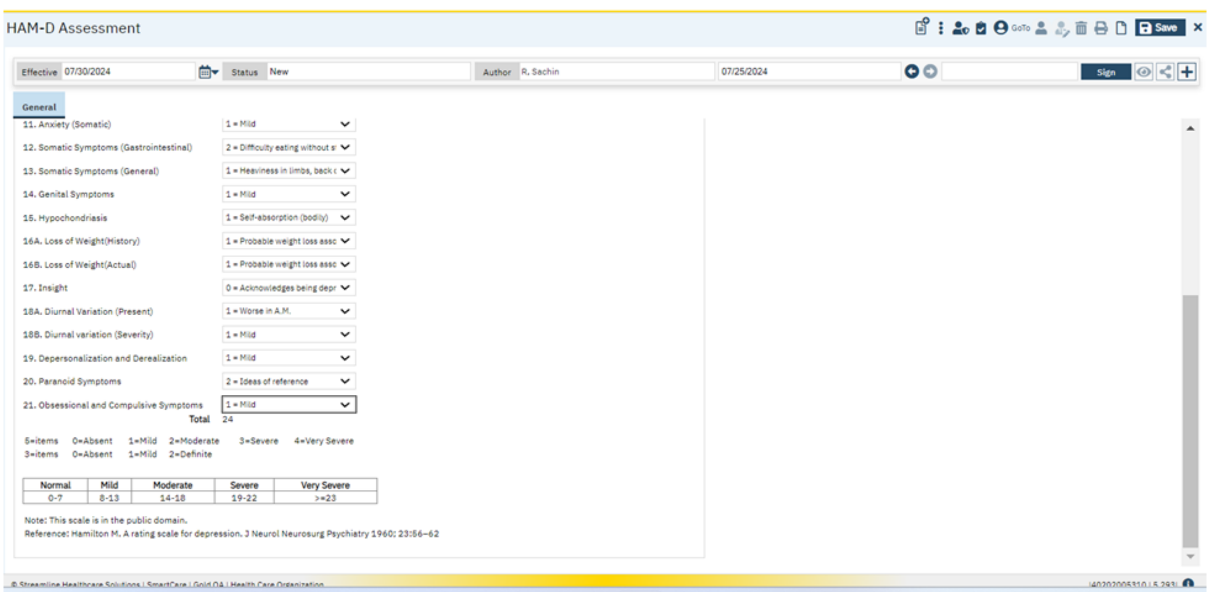
- 0 = Absent
- 1 = Mild
- 2 = Severe

15. Hypochondriasis: This is a dropdown field and displayed with the following values:

- 0 = Not present
- 1 = Self-absorption (bodily)
- 2 = Preoccupation with health
- 3 = Strong conviction of some bodily illness
- 4 = hypochondriacal delusions

16A. Loss of Weight (History): This is a dropdown field and displayed with the following values:

- 0 = No weight loss
- 1 = Probable weight loss associated with present illness
- 2 = Definite (according to patient) weight loss



16B. Loss of Weight (Actual): This is a dropdown field and displayed with the following values:

- 0 = No weight loss

- 1 = Probable weight loss associated with present illness
- 2 = Definite (according to patient) weight loss

17.Insight: This is a dropdown field and displayed with the following values:

- 0 = Acknowledges being depressed and ill
- 1 = Acknowledges illness but attributes cause to bad food, overwork, virus, need for rest, etc.
- 2 = Denies being ill at all

18A. Diurnal Variation (Present): This is a dropdown field and displayed with the following values:

- 0 = No variation
- 1 = Worse in A.M.
- 2 = Worse in P.M.

18B. Diurnal variation (Severity): This is a dropdown field and displayed with the following values:

- 0 = None
- 1 = Mild
- 2 = Severe

19. Depersonalization and Derealization: This is a dropdown field and displayed with the following values:

- 0 = Absent
- 1 = Mild
- 2 = Moderate
- 3 = Severe
- 4 = Incapacitating

20. Paranoid Symptoms: This is a dropdown field and displayed with the following values:

- 0 = None
- 1 = Suspicious
  2 = Ideas of reference
- 3 = Delusions of reference and persecution

21. Obsessional and Compulsive Symptoms: This is a dropdown field and displayed with the following values:

- 0 = Absent
- 1 = Mild
- 2 = Severe

The below mentioned text will be showing in only UI

5=items 0=Absent 1=Mild 2=Moderate 3=Severe 4=Very Severe

3=items 0=Absent 1=Mild 2=Definite

Note: This scale is in the public domain.: This is a Label

Reference: Hamilton M. A rating scale for depression. J Neurol Neurosurg Psychiatry 1960; 23:56–62: This is a label.

With every section having the 'Score' field associated with the dropdown lists. The score values will range from "0-7– Normal", "8 - 13 – mild", "14 -18 - moderate ", "19 - 22 - Severe", ">=23 - Very Severe".

'**Total'** field: – The total score will be displayed based on score selection in every section of (Depressed Mood, Guilt, Suicide, Early Insomnia, Middle Insomnia, Late Insomnia, Work and Activities, Retardation, Agitation, Anxiety (Psychic), etc.).

Data Model Changes:

Core table **"DocumentHAMDAssessments"** is created.

Author: Rakesh Naganagoda

50. Core bugs # 126872: Documents: PDF is not generated.

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

Navigation Path: Login to SmartCare application – Client – Documents – Sign any Document and Generate the PDF.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When SSP_ProcessPDFWithDocumentVersionId was executed from ssp_RegenerateMissingPDF Stored Procedure and when it failed, it went to the generic catch block of Stored Procedure. So, the documents for which SSP_ProcessPDFWithDocumentVersionId failed, PDF was not generated.

With this release, execution of SSP_ProcessPDFWithDocumentVersionId Stored Procedure is wrapped in a try catch block within ssp_RegenerateMissingPDF Stored Procedure. This new catch block will make an entry to error log table and return a custom error message as a result set from this Stored Procedure. Now, the user will be able to find the documentversionid in errorlog table for which execution failed.

Author: Ramya Nagaraj

51. EII # 128048: Implementation of the 'E-Mail' field in the 'Release of Information' Document.

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

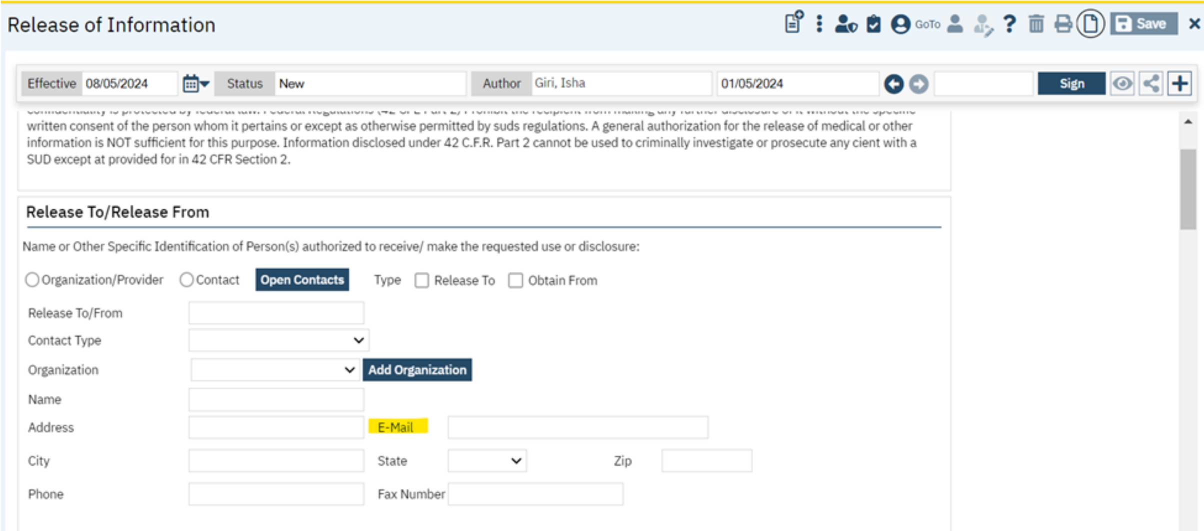
Navigation Path: 'Client' search - 'Release of Information' document.

Functionality 'Before' and 'After' release:

Purpose: To communicate via secure 'Email ID'.

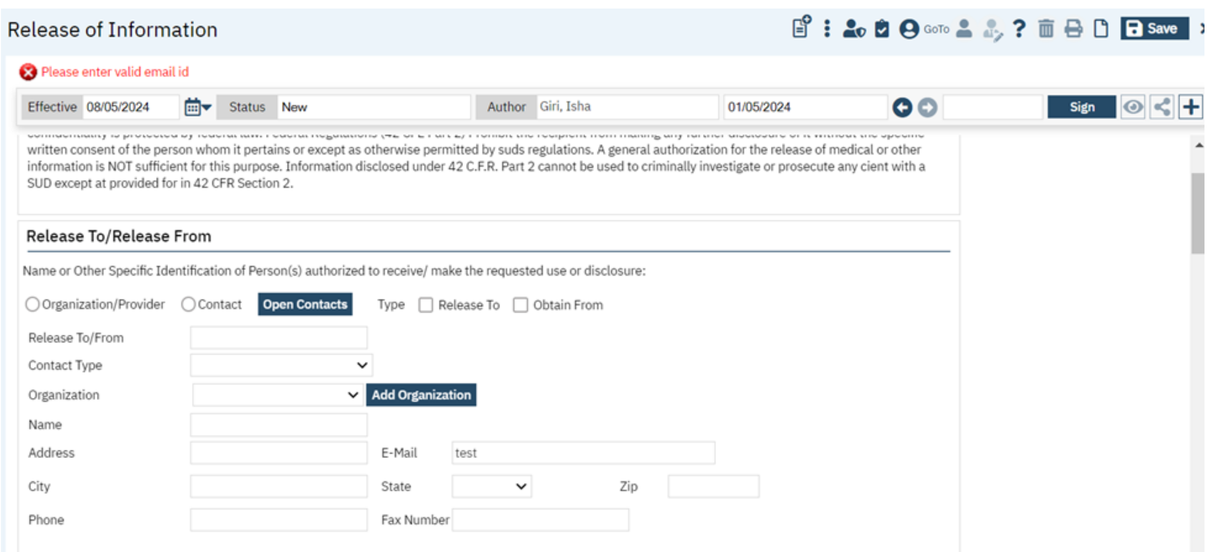
With this release, a new 'E-mail' textbox field has been implemented under the 'Release To/Release From' section in the 'Release of Information' document.

This 'E-Mail' text field is editable.



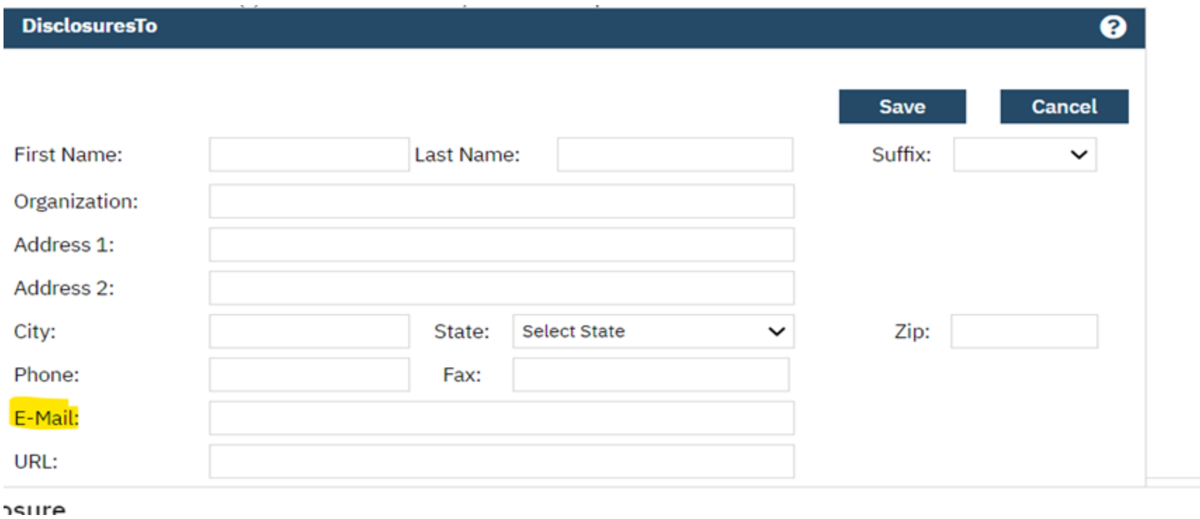
This field will accept a valid 'Email ID'. If an incorrect format of email ID value is entered in the 'E-Mail' field, a validation message will be displayed upon clicking 'Save/Validate/Sign'.

Validation message: "Please enter valid email id"



The E-mail field will be Initialized with the selected organization's email from the 'DisclosuresTo' record if the "Organization/Provider" radio button is selected. And it will initialize the selected contact's email from the 'Client Information(C)' if the "Contact" radio button is selected.

Also, in the 'DisclosuresTo' pop-up, the label is changed from "Email" to "E-Mail".



Data Model changes:

A "ReleaseEmail" column is added to the "DocumentReleaseOfInformations" table.

Author: Akshay Vishwanath

52. EII # 127313: Added these Columns 'Sum20Ratings', 'AverageDLA', 'EstimateGAF' , 'SeverityIndex' 'ChangeScore' and 'SeverityOfIllness' to the DocumentDailyLivingActivity20Scores table .

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

Navigation Path: N/A

Functionality 'Before' and 'After' release:

Purpose: To store the column values 'Sum 20 Ratings', 'Average DLA', 'Estimate GAF', 'Severity Index' 'Change Score' and 'Severity of Illness' in the database.

With this release, a new table called 'DocumentDailyLivingActivity20Scores' has been implemented. The columns 'Sum20Ratings', 'AverageDLA','EstimateGAF','SeverityIndex','ChangeScore' and 'SeverityOfIllness' have been added to 'DocumentDailyLivingActivity20Scores' Table and the column values will be stored in the database.

Data Model changes:

- A new 'DocumentDailyLivingActivity20Scores' Table is added.
- Columns 'Sum20Ratings', 'AverageDLA', 'EstimateGAF', 'SeverityIndex' 'ChangeScore' and, 'SeverityOfIllness' included in 'DocumentDailyLivingActivity20Scores' Table.

Author: Muttu Venkatachalaiah

53. EII # 127338: Implementation of the 'Shift Notes' document.

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

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

Prerequisites for 'Shift Notes':

- Add 'Note' in the 'Shift Notes' pop-up through the below mentioned **path:**
  My Office -- Whiteboard -- Click on Add/Edit hyperlink for the respective client -- Add the Note and Insert – Save.
- Add "Treatment Team Role" through the below-mentioned **path:**

  Administration – 'Staff/Users' -- 'Staff/Users' screen – Click on Staff Name hyperlink – 'Staff Details' screen – 'Staff Preferences' tab – 'Treatment Team' section - 'Treatment Team Role' dropdown - Select 'Treatment Team Role'.
- Set the Shift in the 'MARNumberofShifts' Configuration Key through the **path:**

  Administration -- 'Configuration Keys' screen – Select 'MARNumberofShifts' key – 'Configuration Key Details' -- Set the Shift (ex: 2 or 3).
- Set the Time in the ''MARShiftStartTime' Configuration Key through the **path:**

  Administration -- 'Configuration Keys' screen – Select 'MARShiftStartTime' key – 'Configuration Key Details' -- Set the time (Example: 08:00:00).

Prerequisites for Medication 'Orders':

- The Current, Self-Reported, and Discontinued medication is to be created in the RX screen.

Prerequisites for 'Other Orders':

- The 'Client Order' Document is to be signed.

Prerequisites for 'Vitals':

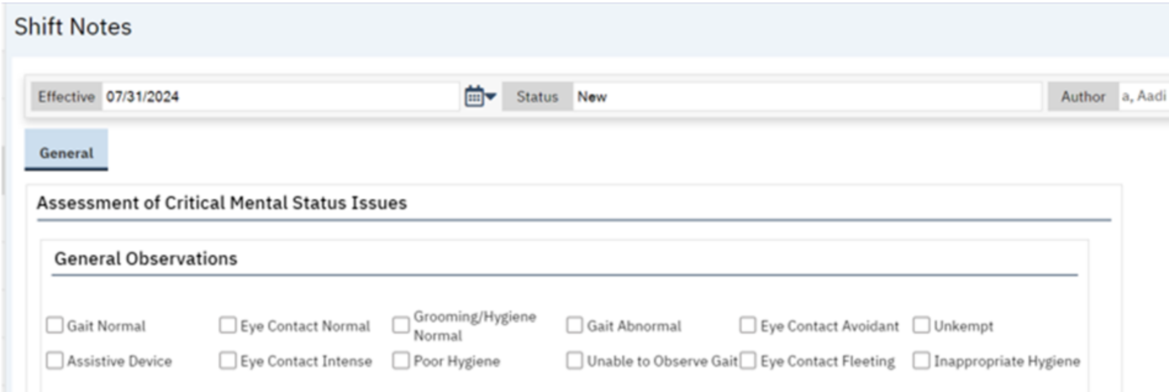
- 'New Entry Flow Sheet' is to be Saved with all the required data.

Navigation Path: 'Client' -- 'Documents' -- 'Shift Notes' screen

Functionality 'Before' and 'After' release:

Purpose: The ability to take brief notes about an interaction with the patient and place these notes into an Insert Grid into the main Shift Note.

With this release, a new document 'Shift Notes' has been Implemented with the following tab, sections, and fields.



- **Effective date:** When a future date is selected a validation message will appear at the top "Effective Date cannot be a future date".

General tab:

1. **'Assessment Of Critical Mental Status Issues'** Section**:**

General Observations:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Gait Normal
2. Eye Contact Normal
3. Grooming/Hygiene Normal
4. Gait Abnormal
5. Eye Contact Avoidant
6. Unkempt
7. Assistive Device
8. Eye Contact Intense
9. Poor Hygiene
10. Unable to Observe Gait
11. Eye Contact Fleeting
12. Inappropriate Hygiene

- The checkbox values are populated from the Global Code Category called 'GeneralObservation'.

Activity:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Normal
2. Hyperactive
3. Motor Tics
4. Slowed
5. Restless

6. Tremor
7. Dystonia
8. Psychomotor Agitation
9. Tardive Dyskinesia

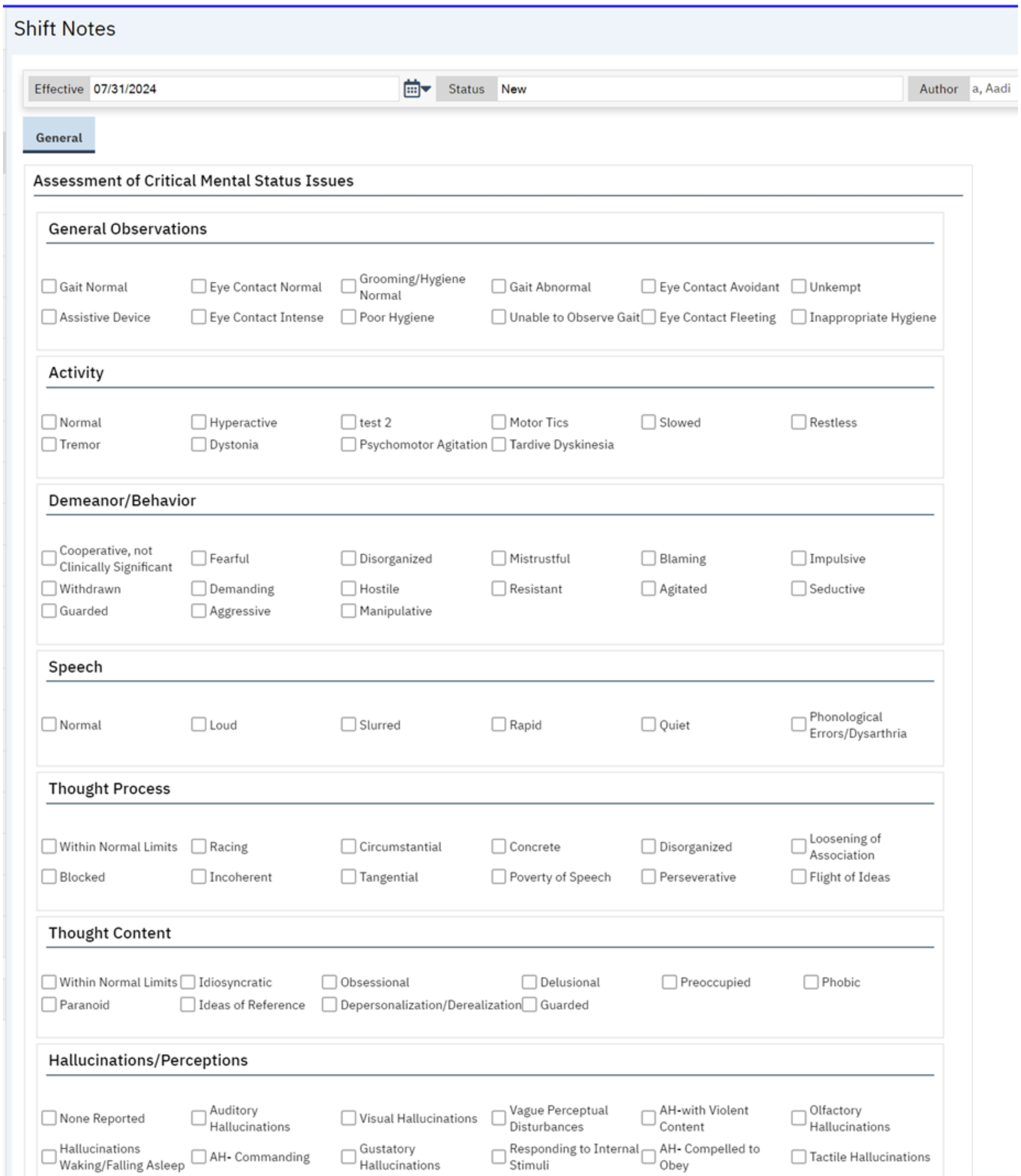
- The checkbox values are populated from The Global Code Category called' ShiftNoteActivity'.

Demeanor/Behavior:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Cooperative, not Clinically Significant
2. Fearful
3. Disorganized
4. Mistrustful
5. Blaming
6. Impulsive
7. Withdrawn
8. Demanding
9. Hostile
10. Resistant
11. Agitated
12. Seductive
13. Guarded
14. Aggressive
15. Manipulative

- The checkbox values are populated from The Global Code Category called 'ShiftNoteBehavior'.



Speech:

- This is a field with multi-select checkbox values, and it’s required to be selected.
- It Contains Below mentioned checkbox values.

1. Normal
2. Loud
3. Slurred
4. Rapid

5. Quiet
6. Phonological Errors/Dysarthria

- The checkbox values are populated from The Global Code Category called 'ShiftNoteSpeech'.

Thought Process:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Within Normal Limits
2. Racing
3. Circumstantial
4. Concrete
5. Disorganized
6. Loosening of Association
7. Blocked
8. Incoherent
9. Tangential
10. Poverty of Speech
11. Perseverative
12. Flight of Ideas

- The checkbox values are populated from The Global Code Category called 'ShiftNoteProcess'.

Thought Content:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Within Normal Limits
2. Idiosyncratic
3. Obsessional
4. Delusional
5. Preoccupied
6. Phobic
7. Paranoid
8. Ideas of Reference
9. Depersonalization/Derealization
10. Guarded

- The checkbox values are populated from The Global Code Category called 'ShiftNoteContent'.

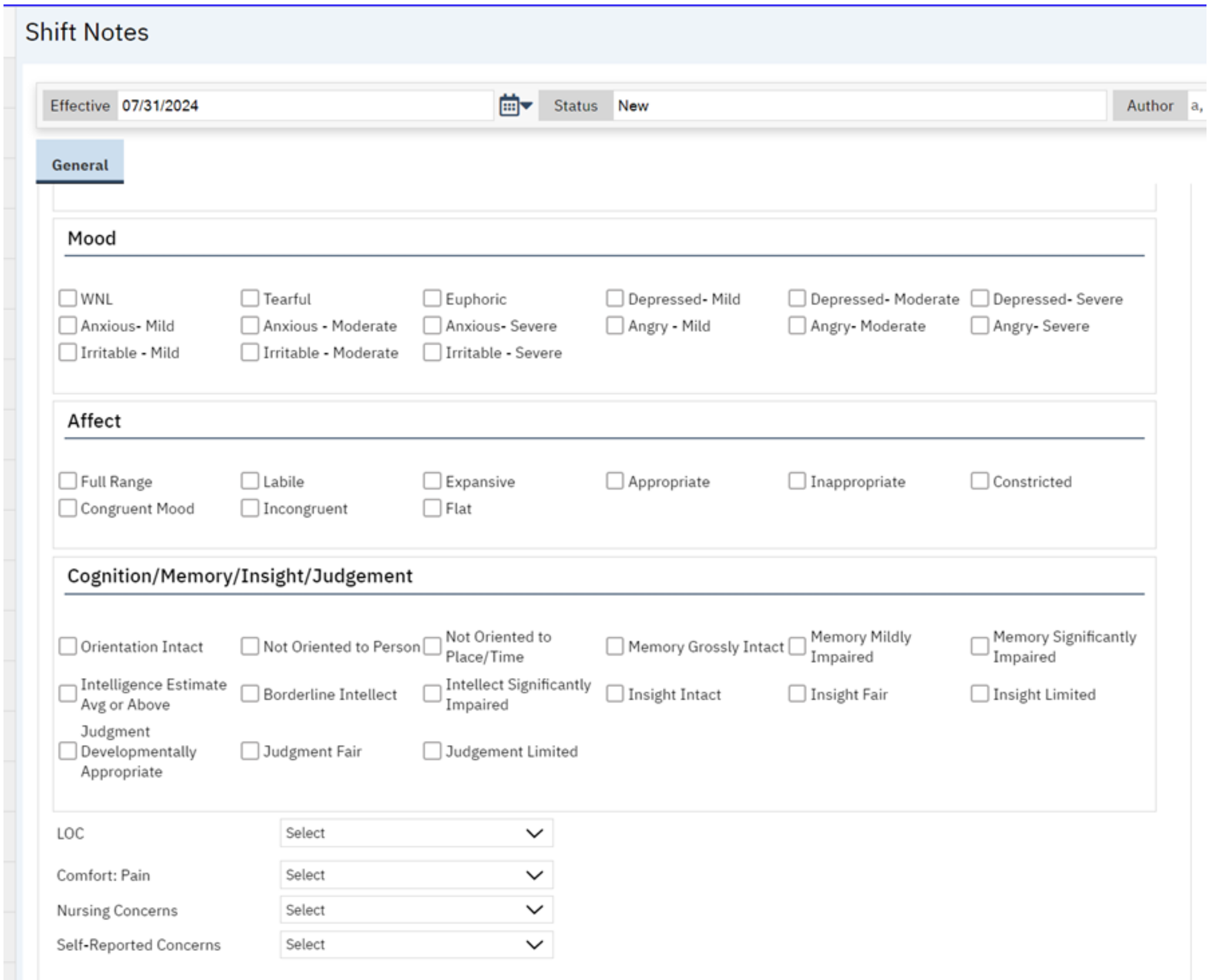
Hallucinations/Perceptions:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. None Reported
2. Auditory Hallucinations
3. Visual Hallucinations
4. Vague Perceptual Disturbances
5. AH-with Violent Content
6. Olfactory Hallucinations
7. Hallucinations Waking/Falling Asleep
8. AH- Commanding

9. Gustatory Hallucinations
10. Responding to Internal Stimuli
11. AH- Compelled to Obey
12. Tactile Hallucinations

- The checkbox values are populated from The Global Code Category called 'ShiftPerception'.



Mood:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. WNL
2. Tearful
3. Euphoric
4. Depressed- Mild
5. Depressed- Moderate
6. Depressed- Severe
7. Anxious- Mild
8. Anxious - Moderate
9. Anxious- Severe
10. Angry - Mild

11. Angry- Moderate
12. Angry- Severe
13. Irritable - Mild
14. Irritable - Moderate
15. Irritable – Severe

- The checkbox values are populated from The Global Code Category called 'ShiftNoteMood'.

Affect:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Full Range
2. Labile
3. Expansive
4. Appropriate
5. Inappropriate
6. Constricted
7. Congruent Mood
8. Incongruent
9. Flat

- The checkbox values are populated from The Global Code Category called 'ShiftNoteAffect'.

Cognition/Memory/Insight/Judgement:

- This is a field with multi-select checkbox values, and it's required to be selected.
- It Contains Below mentioned checkbox values.

1. Orientation Intact
2. Not Oriented to Person
3. Not Oriented to Place/Time
4. Memory Grossly Intact
5. Memory Mildly Impaired
6. Memory Significantly Impaired
7. Intelligence Estimate Avg or Above
8. Borderline Intellect
9. Intellect Significantly Impaired
10. Insight Intact
11. Insight Fair
12. Insight Limited
13. Judgment Developmentally Appropriate
14. Judgment Fair
15. Judgement Limited

- The checkbox values are populated from The Global Code Category called 'ShiftNoteCognition'.

LOC:

- This is dropdown field, and it's required to be selected.
- The dropdown values are populated from The Global Code Category called 'ShiftNotesLOC'
- It Contains Below mentioned dropdown values.

1. Alert

2. Lethargic

3. Sleeping but easily arousable

4. Somnolent (Requires further evaluation)

5. Other

- Upon selecting the 'Other' dropdown values 'Comments' textbox will be displayed, and it's required to enter.

Comfort: Pain

- This is dropdown field, and it's required to be selected.
- The dropdown values are populated from The Global Code Category called 'ComfortPain'
- It Contains Below mentioned dropdown values.
    1. Yes
    2. No
- If the user selects "No" in the Comfort: Pain dropdown, it will hide the "Level (Scale 1 to 10) " and "Location and Duration of Pain" fields.
- If 'Yes' is selected in the Comfort: Pain dropdown, it will display the **'Level (Scale 1 to 10)'** and **'Location and Duration of Pain'** textboxes.
- 'Level (Scale 1 to 10)' textbox field will allow only numeric values with the range from 1 to 10 and it's required to be entered.
- 'Location and Duration of Pain' is a textbox field, and it's required to be entered.

Nursing Concerns:

- This is dropdown field, and it's required to be selected.
- The dropdown values are populated from The Global Code Category called 'NursingConcerns'
- It Contains Below mentioned dropdown values.

1. Risk for Falls (use wheelchair, asset to toilet and bathing)

2. Poor impulse control, other behavioral concerns (may need 1:1)

3. Hx of overdose, substance abuse, ETO (frequent checks)

4. Other

- Upon selecting the 'Other' dropdown values 'Comments' textbox will be displayed, and it's required to enter.

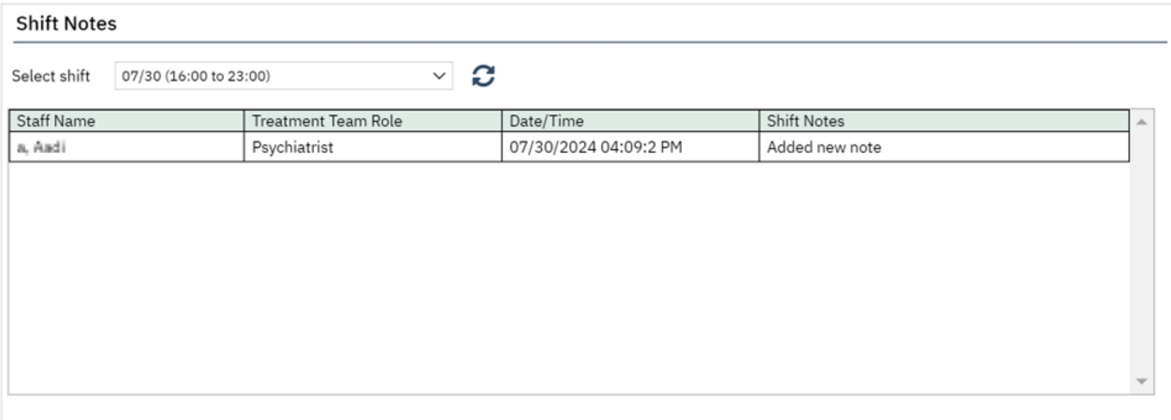
Self-Reported Concerns:

- This is dropdown field, and it's required to be selected.
- The dropdown values are populated from The Global Code Category called 'SelfRepoConcerns'
- It Contains Below mentioned dropdown values.

1. None
2. Other

- Upon selecting the 'Other' dropdown values 'Comments' textbox will be displayed, and it's required to enter.

2. 'Shift Notes' section:



Select shift:

- This is a dropdown field, and it's required to be selected.
- The dropdown values will be displayed based on the below configuration keys.

  1. 'MARNumberofShifts' - The number of shifts to be taken from the configuration key 'MARNumberofShifts'
  2. 'MARShiftStartTime' - the start time for the shift to be taken from "MARShiftStartTime"

- Based on the effective date of the document, the dropdown value will be displayed.
- On selection of a shift time, it will initialize all the entries into this 'Shift Notes' for that shift timing.

'Refresh' icon:

- Upon clicking on this button all entries from the 'Shift Notes pop-up' will initialize into 'Shift Notes' grid for the respective shift timings along with the "Treatment Team Role".

3: Orders:

Medication Orders: In this section the following grids will be displayed.

- 'Current Medications' grid
- 'Self-Reported Medications' grid
- 'Discontinued Medications' grid

Refresh icon: Upon clicking on this icon all entries will be updated.

Orders

Current Medications

Refresh

Current Medications

Drug Name	Instructions	Start	End	Refills	Prescriber	Comments	Source
Adderall	30mg, Tab, Oral 10.00 each Annually	07/30/2024	08/08/2024	0.00	[illegible]		RX
H2Q CoQ10	200mg/gram, Powd, Oral 1.00 each Daily at Noon	07/30/2024	08/08/2024	0.00	[illegible]	[illegible]	RX

Self-Reported Medications

Drug Name	Instructions	Start	End	Refills	Prescriber	Comments
Adderall XR	25mg, Cp24, Oral 10.00 each Daily	07/30/2024	08/08/2024	0.00	125271, Core	

Discontinued Medications

Drug Name	Instructions	Start	End	Refills	Prescriber	Comments
Fast Read Thermometer	Misc, Misc 10.00 units Q8	07/30/2024	08/08/2024	0.00	[illegible]	[illegible]
L-Carnitine	500mg, Tab, Oral 1.00 each Daily	07/30/2024	08/08/2024	0.00	[illegible]	[illegible]

Other Orders: Other Orders will be initialized from Current Orders in Client Orders.

'Refresh' Icon: Upon clicking on this icon all entries will be updated.

Other Orders

Type	Order	Frequency	Priority	Status	Start Date	Staff	Interaction	ACK	Read back and verified
Labs	[illegible]	Once	PRN	Active	07/30/2024 10:00AM	[illegible]			No
Labs	[illegible]	Once	Routine	Active	07/30/2024 3:00PM	[illegible]			No

'Vitals' section:

- The created flow sheet will be displayed under this section in the grid format.
- Upon clicking on the 'Open vitals flow sheet' button it will be navigated to 'New Entry Flow Sheet Screen.

'Refresh' button: Upon clicking on this button all entries will be updated in the vitals section.

Vitals

Open vitals flow sheet Refresh

Type	Item	07/30/2024 05:09 PM			
Height/Weight/BMI/	Height	10.00 In			
	Weight	10.00 lb			
	BMI Ratio (Adult)	70.30 kg/m2			
	Head Circumference				
	BMI Percentile (Chil...	0 %			
Blood Pressure	Systolic	10			
	Diastolic	10			
Pulse	Pulse				
	Pulse Oximetry (SpO2...				
Respiratory	Respiratory				
Abdominal Girth	Abdominal Girth				
Temperature	Temperature				
	Temperature Location				

Global Codes: The below mentioned global codes are newly created.

1. GeneralObservation
2. ShiftNoteActivity
3. ShiftNoteBehavior
4. ShiftNoteSpeech
5. ShiftNoteProcess

6. ShiftNoteContent
7. ShiftPerception
8. ShiftNoteMood
9. ShiftNoteAffect
10. ShiftNoteCognition
11. ShiftNotesLOC
12. ComfortPain
13. NursingConcerns
14. SelfRepoConcerns

Data Model Changes:

- A new table 'documentShiftNoteThoughtContents', 'DocumentShiftNotePerceptions', 'DocumentShiftNoteMoods', 'DocumentShiftNoteAffects', 'DocumentShiftNoteCognitions', 'DocumentShiftNoteShifts','DocumentShiftNotes', 'DocumentShiftNoteGeneralObservations', 'DocumentShiftNoteActivities','DocumentShiftNoteDemeanorBehaviors', 'DocumentShiftNoteSpeeches', 'DocumentShiftNoteThoughtProcesses' are added.

Author: Ramya Nagaraj

54. EII # 128194: Implementation of new section in 'Release of Information' document.

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

Navigation Path: 'Client' - 'Release of Information' document.

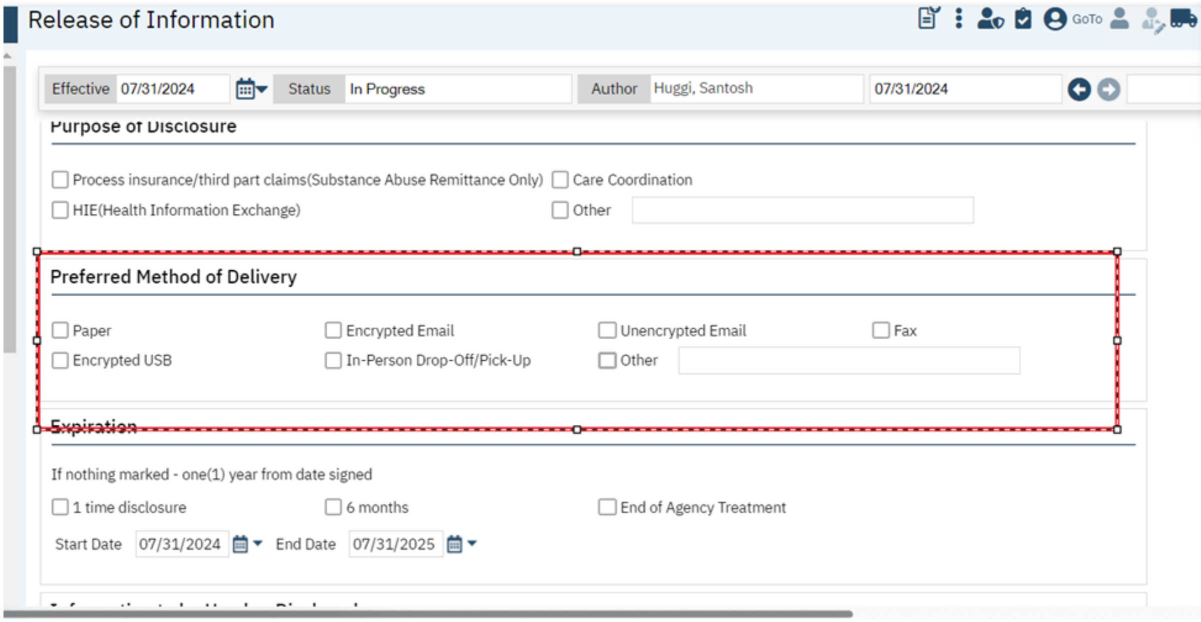
Functionality 'Before' and 'After' release:

Purpose: Currently on the release of information document, there is not a section to identify how the information should be delivered to the requestor. Its only required if you are releasing to, not obtaining from. When staff send a request for information to outside agencies, the customer would like to be able to specify how they want to receive it.

With this change, a new section 'Preferred Method of Delivery' is implemented in the 'Release of Information' document. This section will be displayed between "Purpose of Disclosure" and "Expiration" sections.

The 'Preferred Method of Delivery' section is displayed with below checkboxes, which are driven from the Global code category 'ROIMODEOFDELIVERY'. This global code is User-Defined.

- Paper
- Encrypted Email
- Unencrypted Email
- Fax
- Encrypted USB
- In-Person Drop-Off/Pick-Up
- Other

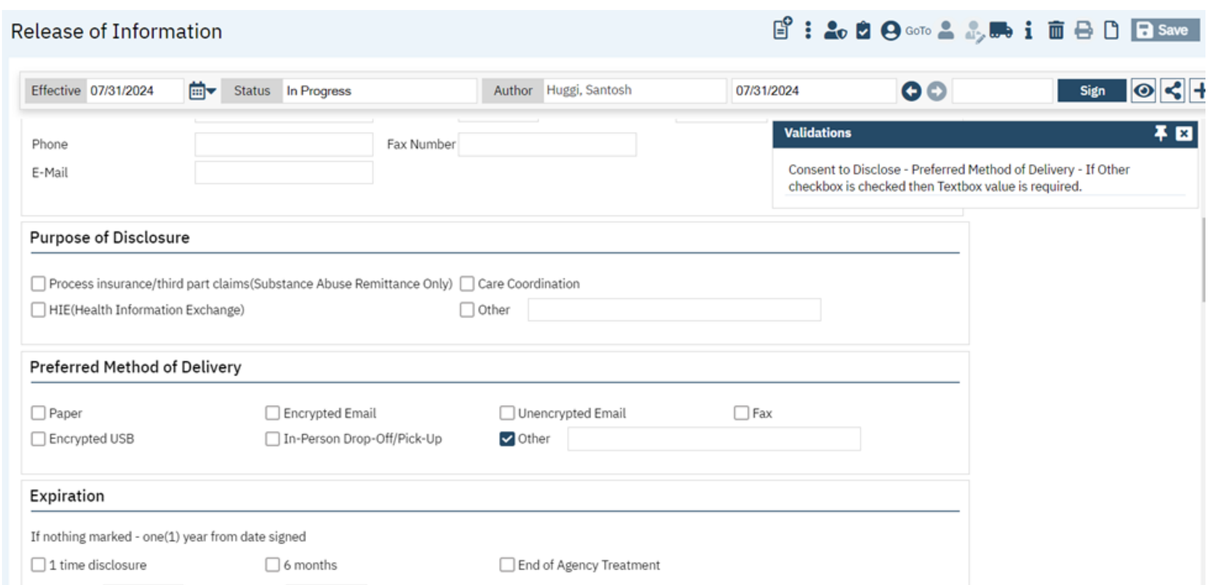


The Textbox is displayed next to the other checkbox option. The Textbox field will be disabled by default.

If the "Other" checkbox is checked, then the textbox field will be enabled, and it is a required field.

The below validation message is displayed when the Textbox field is left empty when 'Other' checkbox is checked.

Validation message: "Consent to Disclose - Preferred Method of Delivery - If Other checkbox is checked then Textbox value is required."



Data Model changes: Yes

1) Added column "OtherPreferredModeOfDelivery" in table "DocumentReleaseOfInformations".

2) Created table "DocumentROIModeOfDeliveries"

Author: Kiran Tigarimath

55. Core bugs # 127484: Documents: Additional Version creating on clicking Multiple Times on sign button.

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

Navigation Path: 'Client' - 'Select any document' - enter all the details – Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. An additional version of the document was being created when the user clicked multiple times on 'Sign' button in any document.

With this release, the above-mentioned issue has been resolved. Now, the sign button will be disabled once after clicking 'Sign' button in any document to resolve additional version creation.

Author: Harika Rajendran

56. Core bugs # 128629: Care Plan: The duplicate 'Interventions' in the 'Intervention' tab when the user created new plans.

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

Navigation Path: 'Client' Search - Select a Client - Go to the 'Care Plan' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Treatment Plans (Care Plans)' displayed duplicate 'Interventions' in the 'Intervention' tab of the plan when the user were creating new plans.

With this release, the issue mentioned above is resolved. Now, no duplicate Interventions are displayed in the 'Intervention' tab of the Care plan when the user tries to create new plans.

Author: Sachin Ranganathappa

57. Core bugs # 128648: History and Physical tab bug

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

Navigation Path: Go Search - Select Client - Services/Notes - select procedure associated to History and Physical - History and Physical screen - Note tab - click on History of Present Illness.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the History and Physical Service note, under Note tab, when the user clicked on the History of Present Illness sub tab and then clicked on any other tabs, the details of History of Present Illness sub tab was displayed.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on the History of Present Illness sub tab and then clicks on any other tabs, the details of the respective tabs are displaying.

Author: Rakesh Gangadhara

58. Core bugs # 128528: Individual Service Plan: Error message is displayed when accessing the screen.

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

Navigation Path: Go search-Client- Individual service Plan.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to access the Individual Service Plan, the error message was displayed.

With this release, the above-mentioned issue is resolved. Now, the error message is not displayed when the user tries to access the Individual Service Plan.

Author: Sachin Ranganathappa

59. Core bugs # 128598: National Outcome Measures (NOMs): Unable to insert Dx due to Error.

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

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

Navigation Path: Go Search - Select Client - National Outcome Measures (NOMs) (Client) – National Outcome Measures(NOMs) Page - New- click on Diagnosis tab - Enter F29 in code field - click on tab on the keyboard.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the diagnosis tab of the National Outcome Measures (NOMs) screen, the users were unable to search diagnosis "F29" where it says it is an "Invalid Dx". But on searching "F2" and clicking tab, it opened up the pop up where user can then search the F29 diagnosis.

With this release, the above-mentioned issue has been resolved. Now, users will not be able to find "F29" code in both pop up and in the National Outcome Measures (NOMs) screen Diagnosis tab. I.e., if any code not found in the page level search, same will not be available in the pop up as well.

Author: Kiran Tigarimath

60. EII # 126616: Implementation of a 'Typeable Search box' for the 'Author' dropdown field in the 'Document', 'Events', and 'Service Note' screens.

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

Prerequisites: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the author drop-down will display as typeable search text boxes instead of a drop-down.
- When the key value is set to "No", the author drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".

Navigation Path 1: 'Client' search – Select a 'Client' – Navigate to 'Documents' screen – Select a 'New Document' – 'Author' Dropdown field.

Navigation Path 2: 'Client' search – Select a 'Client' – Navigate to 'Services Notes' screen –Select 'New Service notes' – 'Author' Dropdown field.

Navigation Path 3: 'Client' search – Select a 'Client' – Navigate to 'Events' screen –Select 'New Event' – 'Author' Dropdown field.

Navigation Path 4: 'Administration' – 'Configuration Keys' list page – 'Configuration Key Details' screen.

Navigation Path 5: 'Administration' – 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the 'Permission Type' as 'StaffAccessRules' – click the 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Purpose: To change the 'Author' dropdown to a 'Typeable search box' for the 'Document' 'Events' Screen and 'Service Note' screen to improve the performance when there are large number of staff records.

With this release, the **'**Author' dropdown field has been changed to the 'Typeable Search textbox' in the 'Documents', 'Events', and the 'Services Note' screen when System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to "Yes".

When the user searches with any staff name under the 'Author' 'Typeable search textbox' field, a typeable search textbox displays the list of staff names in the 'Author' field of the 'Document', 'Events,' and 'Service Note' screen.

The below-mentioned icons will be added to the search results for the 'Typable search textbox' before the username in the 'Author' field.

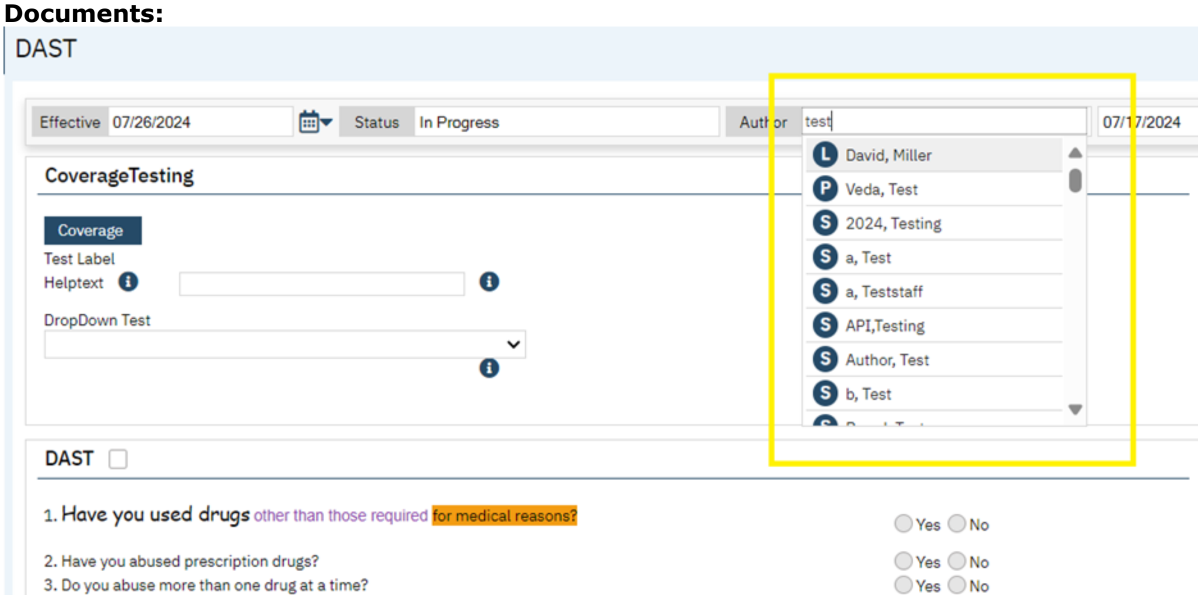
P - Proxy User

N – Non-staff User

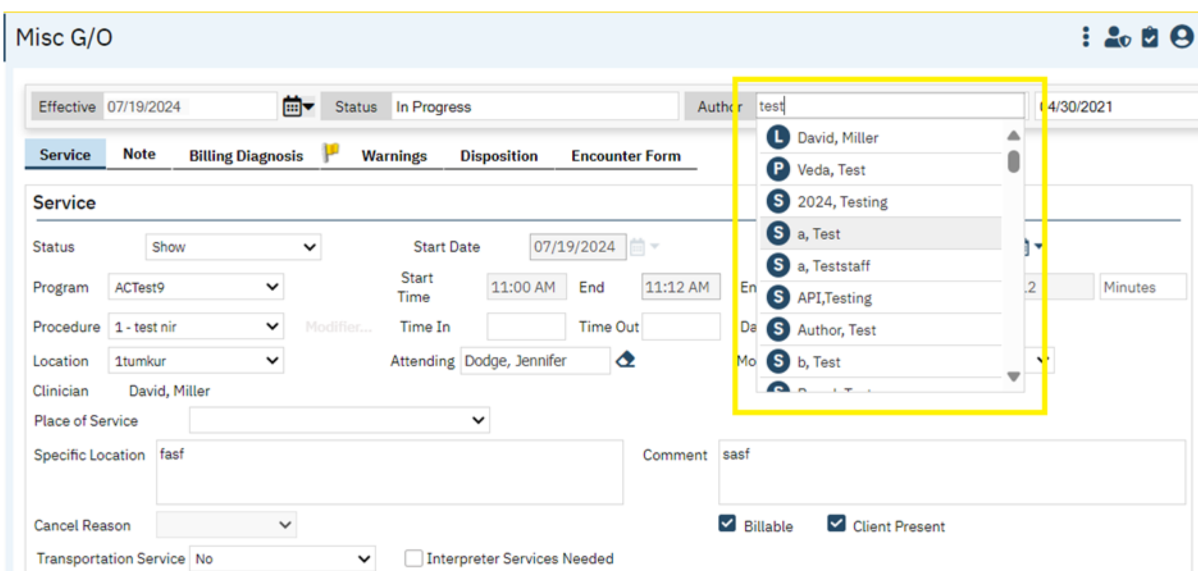
S – Staff User

L – Logged-in Staff.

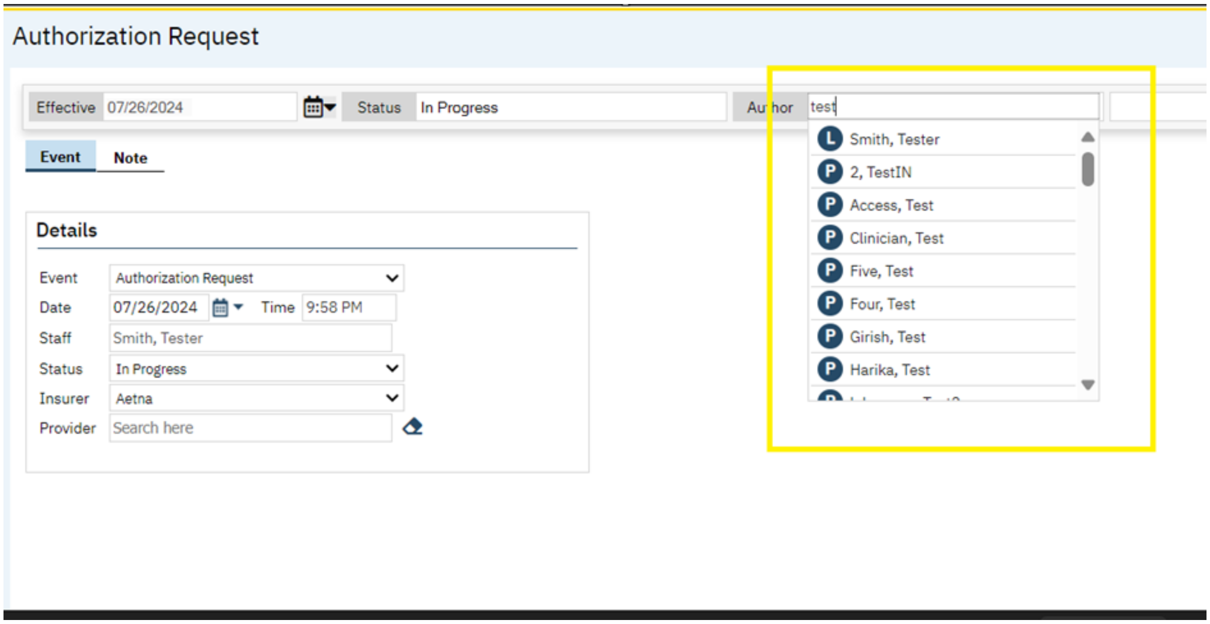
Documents:



Service Notes:



Events:



The below-mentioned permission type is applied to display the values in the 'Document', 'Events', and the 'Service Note' screen typeable search box for the 'Author' field.

Permission Type: StaffAccessRules
Permission Item:

1. AllStaff
2. LimitedStaff

a) If the logged in staff has "LimitedStaff '' access Rule then the typeable search textbox displays the staff who is associated with any of the Program that the logged in staff is also associated with.

b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.

c) If the logged in staff has both "LimitedStaff" and "AllStaff" Access Ru**le, then "AllStaff" takes Precedence.**

Author: Akshay Vishwanath

61. EII # 127345: Changes to the Treatment Team screens.

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

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

Prerequisite:

1. Enroll/request a Program for a client through the **Path:**
   'Client' – 'Programs'– 'Programs' list page -- Click on New – Program Assignment Details --Enroll or Request a Program to client.

2. The system configuration key ‘DisplayCDAGSectionInStaffDetails’ value is set to ‘Yes’.
3. The system configuration key ‘EnableClinicalDataAccessGrouping’ value is set to ‘Yes’.

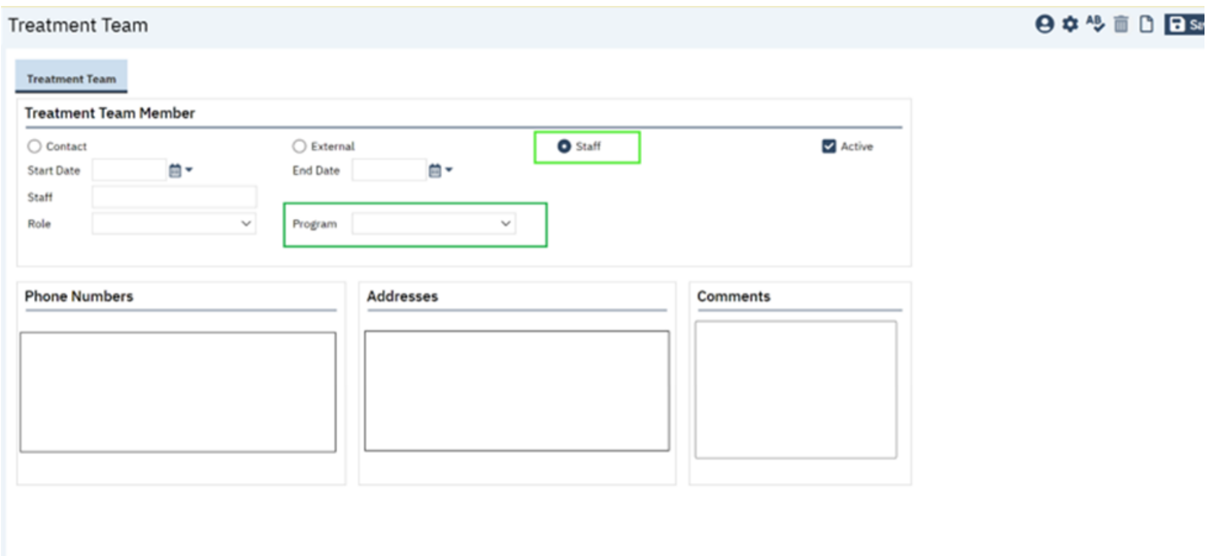
Navigation Path 1: ‘Client’--‘Treatment Team’--‘Treatment Team’ List Page--‘Treatment Team’ Details page.

Navigation Path 2: ‘Client’ --- ‘Client Dashboard’ – ‘Treatment Team’ widget.

Functionality ‘Before’ and ‘After’ release:

Purpose: To see which client program each treatment team member is associated with (e.g., Rapid Response team), and from a supervisory level allow for reporting of caseload assignments and capacity management.

With this release, the ‘Program’ dropdown has been implemented ‘Treatment Team’ Details page. The Program dropdown will be displayed only when the member type = 'Staff'(Radio button) is selected.

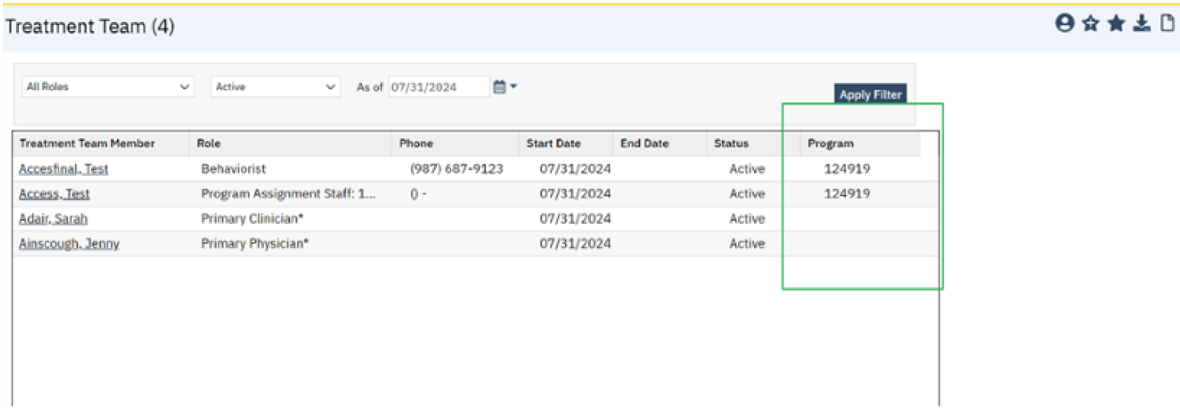


- When CDAG is turned Off, the Program dropdown will display all the programs which are in Requested or Enrolled state for the Client.

Note: Already the Treatment team screen has a Program dropdown when CDAG is turned On.

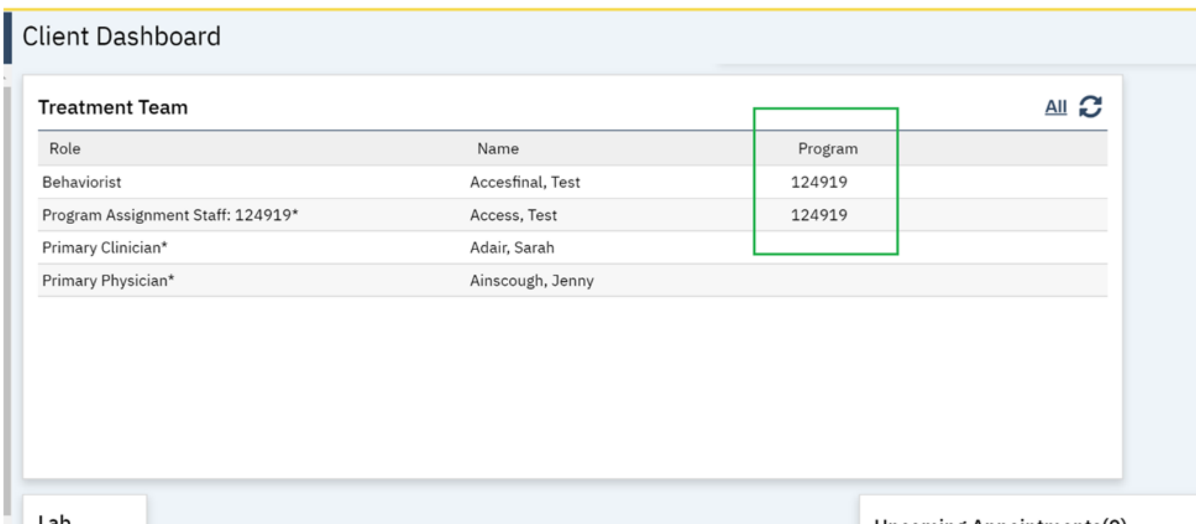
Treatment Team List Page: A new Program column has been implemented in the ‘Treatment Team’ List Page. It displays the associated client program for the respective Treatment team members.

- When CDAG is turned Off, Grid displays the Programs that Treatment Team member associated with irrespective of logged in staff CDAG.
- When CDAG is turned On, Grid Displays the Programs based on the logged in staff selected CDAG profile.



Treatment Team widget: A new Program column has been implemented for Treatment Team widget in the Client Dashboard. It displays the associated client program for the respective Treatment team members.

- When CDAG is turned Off, Grid displays Programs that Treatment Team members associated with irrespective of logged in staff CDAG.
- When CDAG is turned On, Grid Display the Programs based on the logged in staff selected CDAG profile.



Note: Once the Program is discharged, the Treatment Team member will be deactivated, and the end date of the Treatment Team member will be updated to program discharge date once the Job is completed.

Electronic Eligibility

Reference No	Task No	Description
62	Core Bugs # 128114	Electronic Eligibility Mapping Maintenance (Admin) screen is displayed with red error.

Author: Debanjit Das

62. Core Bugs # 128114: Electronic Eligibility Mapping Maintenance (Admin) screen is displayed with red error.

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

Navigation Path: Go search-'Electronic Eligibility Mapping Maintenance (Administration).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Some installations of the Electronic Eligibility Verification Mapping Maintenance list and detail pages, experienced bugs that caused red errors to appear when attempting to load the pages.

With this release, the above issue has been resolved. Now, partial/incomplete installations of the Electronic Eligibility Verification Mapping Maintenance list and detail pages are repaired and a red error message is not displayed when selected.

Email Configuration

Reference No	Task No	Description
63	Core Bugs # 128406	'Email Configuration' screen: Incorrect password is displayed in the password field when the user modified and saved it.

Author: Praveen Gangadhara

63. Core Bugs # 128406: 'Email Configuration' screen: Incorrect password is displayed in the password field when the user modified and saved it.

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

Navigation Path: Administration -- 'Email Configuration' -- 'Email Configuration' screen -- Modify the 'Password' field and click on 'Save' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Email Configuration' screen, when the user modified the 'Password' in the field and clicked on Save, the modified password was not displayed. The system was displaying the previously entered password when clicked on 'Save'.

With this release, the above-mentioned issue has been resolved. Now, the modified password is displayed when the user modifies and saves the 'Password' in the 'Email Configuration' screen.

Error Log

Reference No	Task No	Description
7	Core Bugs # 128913	Excessive number of errors logged in the Error Log table.

Author: Niroop Hassan

7. Core Bugs # 128913: Excessive number of errors logged in the Error Log table.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. The user observed the excessive number of below mentioned errors in the Error Log table.
***Error Message**: 'HotKeyHandler.ashx' does not exist*

With this release, the above-mentioned issue has been resolved. Now, the above-mentioned error is not displayed in the Error Log table.

Events

Reference No	Task No	Description
64	Core Bugs # 128527	CM Event Screen - Authorization Request: The code dropdown was not filtering by site.
65	Core Bugs # 128559	Typable Search box - Life Event List and Detail page.

Author: Rakesh Gangadhara

64. Core Bugs # 128527: CM Event Screen - Authorization Request: The code dropdown was not filtering by site.

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

Prerequisite:

1.A 'Provider Contract' is selected, multiple sites are added and rates are associated to each site.

2.The same Provider and insurer are mapped in "CM Events" Events tab.

3. Select "AuthorizationRequest" as Event in "CM Events".

Navigation Path: Client Search' - 'CM Events –Click on New icon-Select 'Authorization Request' from the Event drop down-Click on Note tab-Select the site from the site drop down- select the value in the Code drop down.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The code drop down in the 'Authorization Request' screen was showing all the Contracted Rates instead of showing only the Contracted Rates which are associated with the selected 'Site'.

With this release, the above-mentioned issue has been resolved. Now, the Code drop down in the 'Authorization Request' screen displays only the Contracted Rates which are associated with the selected 'Site'.

Author: Niroop Hassan

65. Core Bugs # 128559: Typable Search box - Life Event List and Detail page.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' or 'No' by following the below **path:**

Administration -- Configuration Keys -- DisplayStaffAsTypeableSearchTextBox

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox :

- When the key value is set to "Yes", the staff drop-downs will display type-able search text boxes instead of a drop-down.
- When the key value is set to "No, " the staff drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path 1: 'Client' -- 'Life Events' -- 'Life Events' list page.

Navigation Path 2: 'Client' -- 'Life Events' -- 'Life Events' list page -- Click on 'New' icon -- 'Life Event Details' page.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. The 'Life Event' list page and 'Life Event Details' page, had dropdown option for selecting staff. This was causing the performance issue when there were large number of staff records.

With this release, the dropdown option has been changed to a Typeable Search Text field for Staff selection in the 'Life Event' list ' and 'Life Event Details' pages, when the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes'.

Foster Care

Reference No	Task No	Description
66	Core Bugs # 128368	Status Change Form Document: The 'Staff Providing service name' format is displayed in 'FirstName, LastName' instead of 'FirstName LastName' under the 'PDF'.
67	Core Bugs # 128512	Referrals: The Child Hyperlink redirected to the incorrect Screen.
68	Core Bugs # 128575	Correct client is not displayed in the 'Biological Family' popup

Author: Abhishek Naik

66. Core Bugs # 128368: Status Change Form Document: The 'Staff Providing service name' format is displayed in 'FirstName, LastName' instead of 'FirstName LastName' under the 'PDF'.

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

Navigation Path: 'Client' -- 'Status Change Form' document – 'Sign' the document – Check the 'Staff Providing service' field in the PDF.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Staff Providing service name' format was displayed in FirstName, LastName instead of FirstName LastName under the 'PDF'.

With this release, the issue mentioned above has been resolved. Now, the 'Staff Providing service name' format is displayed in FirstName LastName under the PDF.

Author: Abhishek Naik

67. Core Bugs # 128512: Referrals: The Child Hyperlink redirected to the incorrect Screen.

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

Navigation Path: 'My Office' - 'Referrals' list page – Click on Child hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked on the Child Hyperlink on the Referrals list page, it was redirected to the wrong screen instead of Client information(c).

With this release, the above-mentioned issue has been resolved. Now, when the user clicked on the Child Hyperlink on the Referrals list page, it is redirected to the Client Information (c) screen.

Author: Lakshmi Kumarappan

68. Core Bugs # 128575: Correct client is not displayed in the 'Biological Family' popup.

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

Navigation Path: My Office -- 'Placement History' -- 'Placement History' list page screen – click on 'Sibs' hyperlink – 'Biological Family' popup – 'Children' section.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Placement History list page, when the user clicked on 'Sibs' hyperlink, the Biological Family popup was displayed with an incorrect client(child) in the Children section.

With this release, the above-mentioned issue has been resolved. Now, the correct client is displayed in the Biological Family popup, when the user clicks on 'Sibs' hyperlink in the Placement History list page.

Group Services

Reference No	Task No	Description
69	EII # 127432	Group Details and Group Service Details :Mask Client names for Staffs who do not have access to them.
70	Core Bugs # 128354	Performance issue in the Group service List page.

Author: Suganya Sivakumar

69. EII # 127432: Group Details and Group Service Details :Mask Client names for Staffs who do not have access to them.

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

Prerequisite:

1.Add the Client to the group services and then make the client Inactive and deny access to the client.

Navigation Path 1: 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 2: Go to Group Service Detail Screen - Enter all the required fields in the Service Tab - Click on Save Button - Navigate to Note tab - Under Client Note enter some values - Click on Save Button.

Navigation Path 3: Administration- Staff/Users- Staff/Users List Page - In the Searchable field - Search by Logged In Staff name - Click on the Staff Name Hyperlink-Staff Detail page - Navigate to Client Access Overrides tab - In the Denied Clients Section - Click on Add To List button - Client search popup displays - Search and select the Client -Add To List - Click on Save Icon.

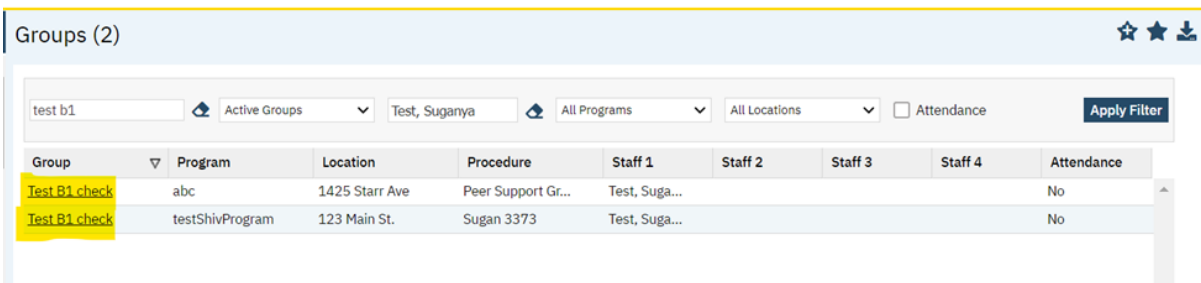
Navigation Path 4: Client- Client Information - Client Information (c) detail page - Ensure No Enrolled / Requested Programs - Under General tab - Uncheck the Active checkbox - Click on Save Icon.

Functionality 'Before' and 'After' release:

Purpose: When the logged in staff does not have access to clients (Inactive and restricted via access rule) who are present in the group, then the entire group template will be hidden to that staff and hence they cannot access that particular group.

In this scenario, the Client name will be masked and disabled so that staff will not be able to access their service information. This way, the Group template will still be accessible to staff even if they do not have access to one or more Clients in the Group.
With this release, the following changes are implemented in the group details screen and the group service details screen.

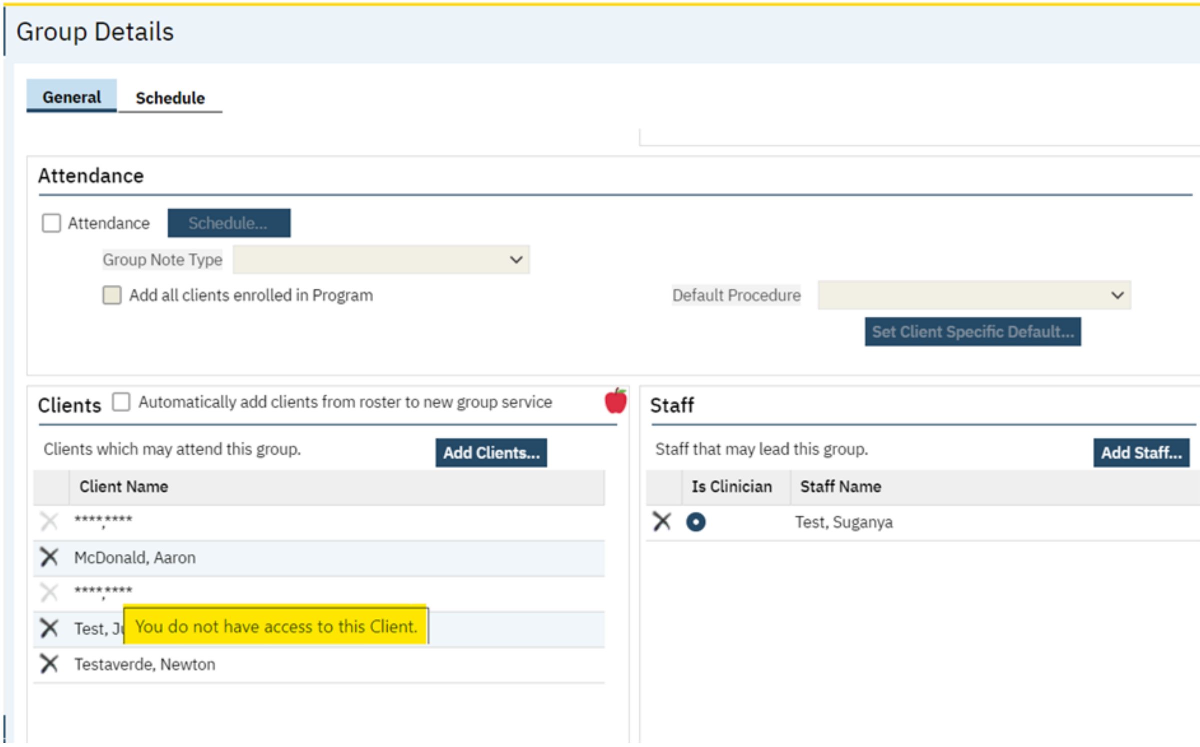
1.In the Group list page: The groups that have restricted clients will be displayed to the staff. Even if the group does not have access to one or more Clients in the Group.



2**. In the Group details page:**

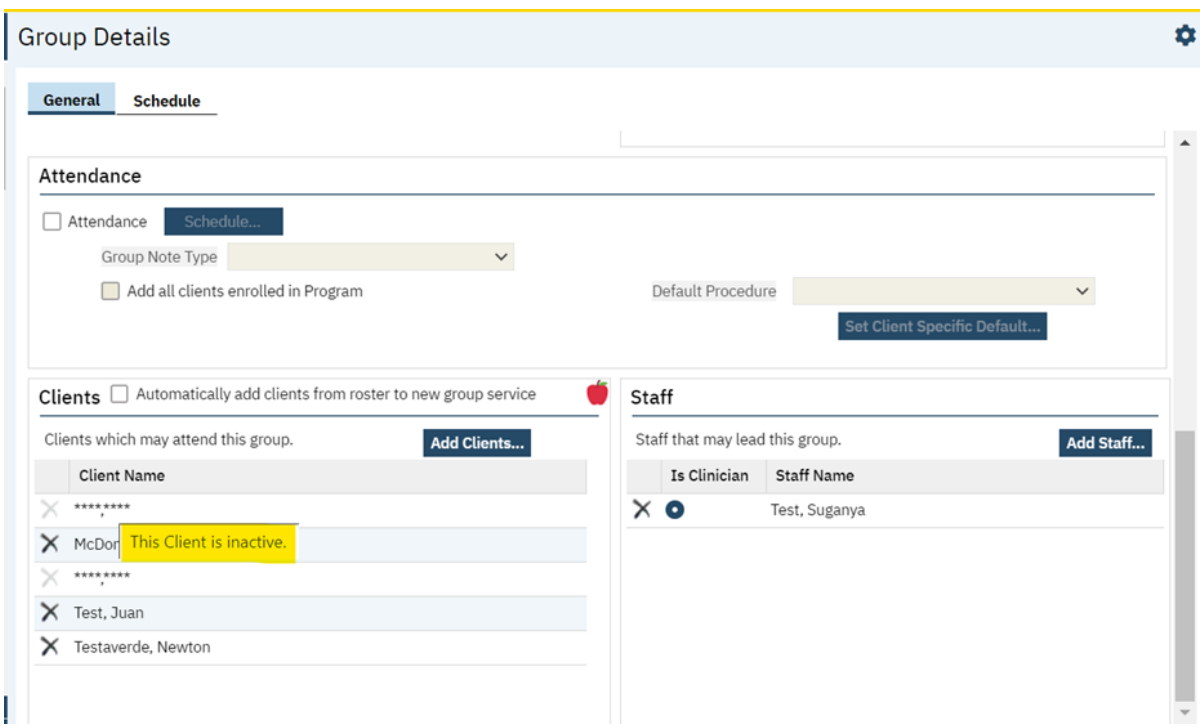
i) If the staff accessing the Group template does not have access/ restricted to a particular Client via their Client Access Rules, then mask the Client Name and disable it so that they do not have access to those Clients.

The Client's name will be masked like this (****, ****). And on the mouse hover displays the tooltip message like "You do not have access to this Client.".



ii) If a Client in the Group is inactive, then mask the Client Name and disable it so that users do not have access to such Clients.

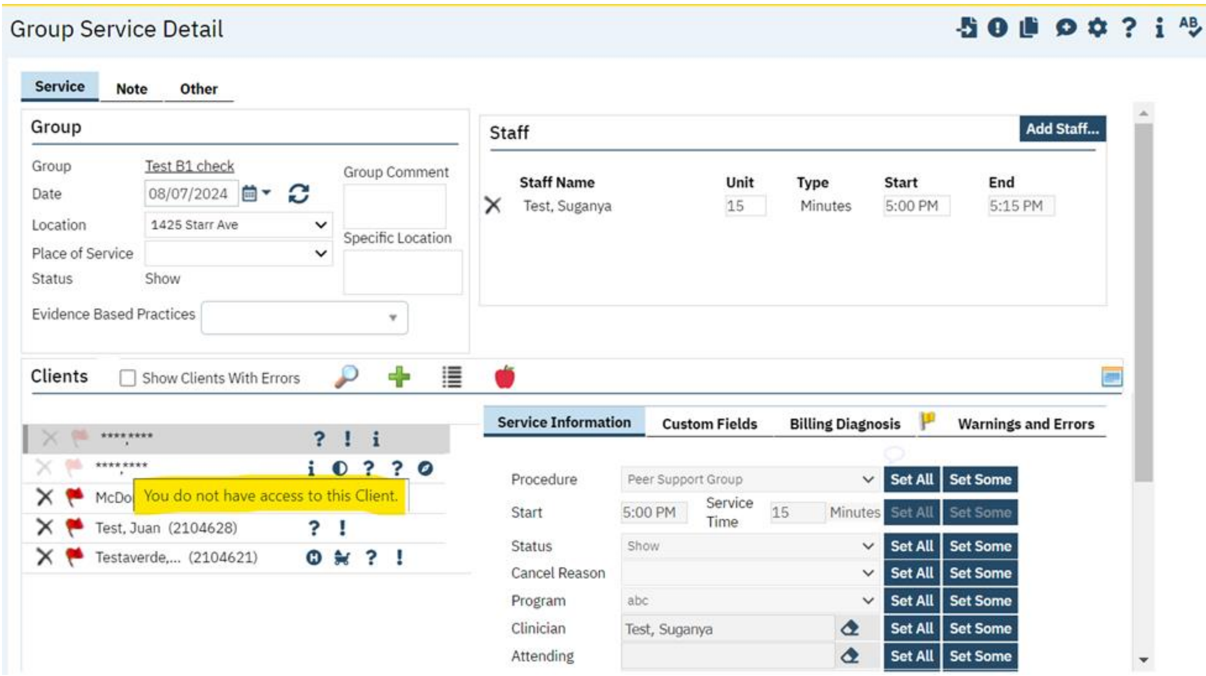
The Client's name will be masked like this (****, ****). And on the mouse hover displays the tooltip message like "This Client is inactive.".



3. In the Group service detail page: In the Service tab under the Clients section.

i) If the staff accessing the Group template does not have access/restricted to a particular Client via their Client Access Rules, then mask the Client Name and disable it so that they do not have access to those Clients.

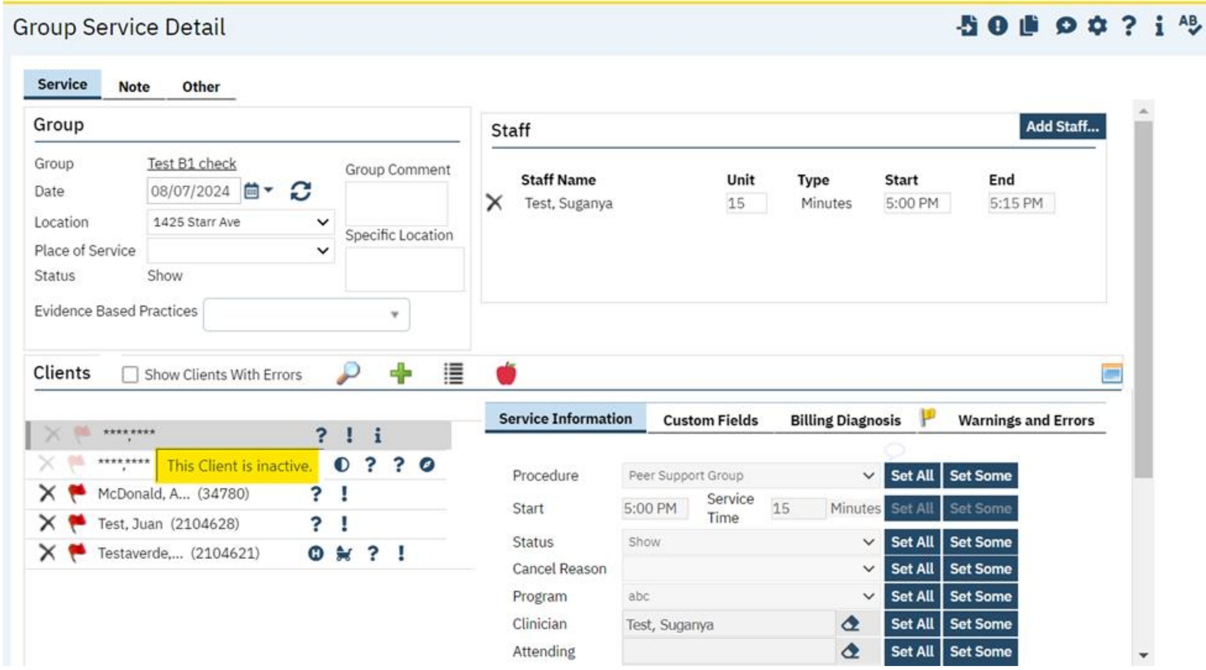
The Client's name will be masked like this (****, ****). And on the mouse hover displays the tooltip message like "You do not have access to this Client.".



All the tabs like – Service Information, Custom fields, Billing Diagnosis, Warnings and Errors, and the Encounter form tab are also disabled for the access denied client.

ii) If a Client in the Group is inactive, then the Client Name is masked and disabled such that the users do not access such Clients.

The Client's name will be masked like this (****, ****). And on the mouse hover displays the tooltip message like "This Client is inactive.".



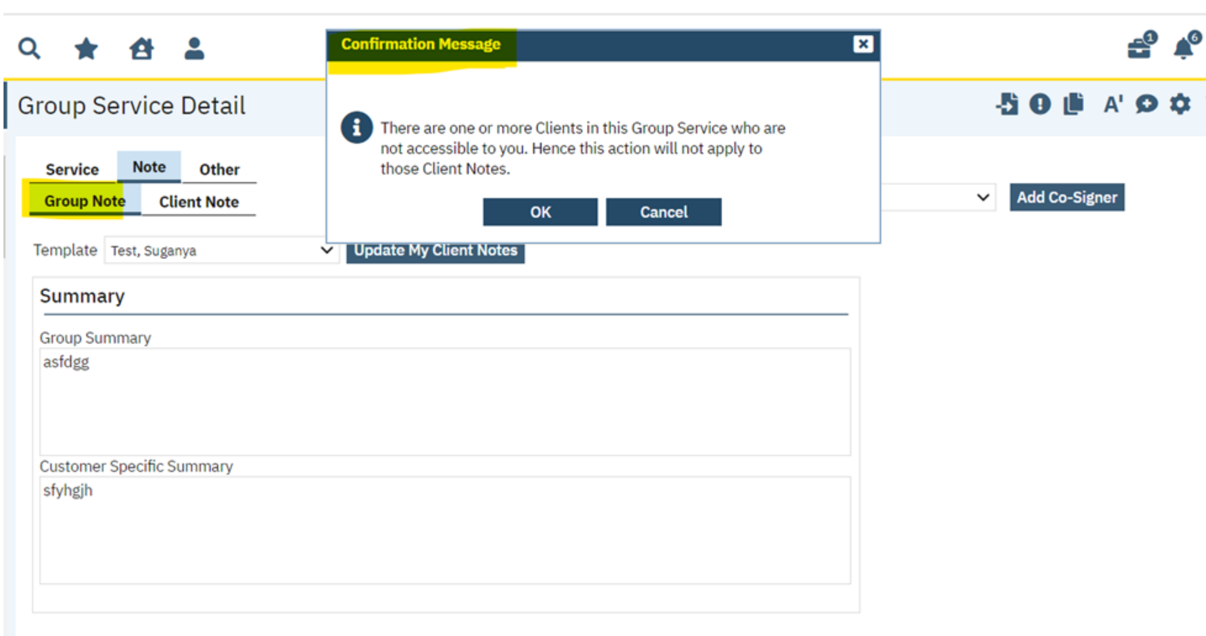
All the tabs like – Service Information, Custom fields, Billing Diagnosis, Warnings and Errors, and the Encounter form tab are also disabled for the access denied client.

1.For Masked Clients required field validations/validation errors are not displayed.

Confirmation Message:

1. In the group service detail screen under the Client Note tab - Click on the "Sign My Notes" and "Add Cosigner" buttons, It will display the below confirmation message.

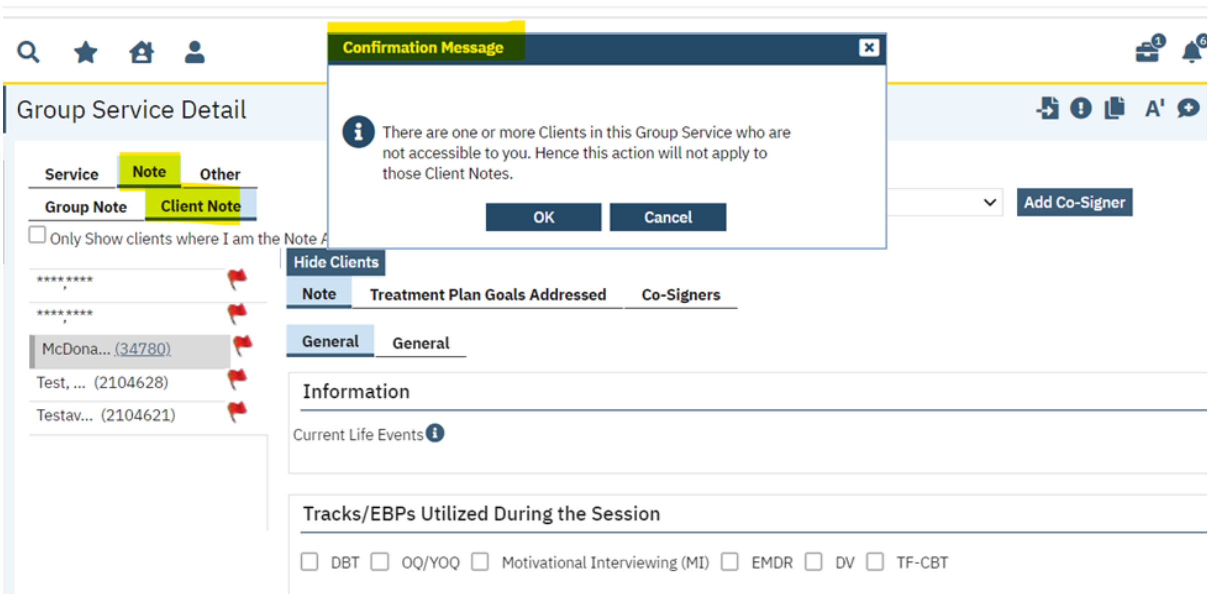
Confirmation Message - "There are one or more Clients in this Group Service who are not accessible to you. Hence this action will not apply to those Client Notes.".



Confirmation Message:

1. In the group service detail screen under the Group Note tab - While updating Group Note, if there are any masked/disabled Clients in the list, the action "Update My Client Notes" will display the following confirmation message:

"There are one or more Clients in this group service who are not accessible to you. Hence this action will not apply to those Client Notes.".



Author: Aishwarya Bommaklar

70. Core Bugs # 128354: Performance issue in the Group service List page.

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

Navigation Path: My Office - Group Services.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There was a performance issue in the Group service List page.

With this release, the above-mentioned issue is resolved. Now, the ssp_ListPageSCGroupService is optimized to improve the performance of the Group service List page.

Health Data Elements

Reference No	Task No	Description
71	EII # 123837	Added SUD checkbox in Health Data Elements -Creating Vitals/Labs

Author: Suganya Sivakumar

71. EII # 123837: Added SUD checkbox in Health Data Elements -Creating Vitals/Labs.

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

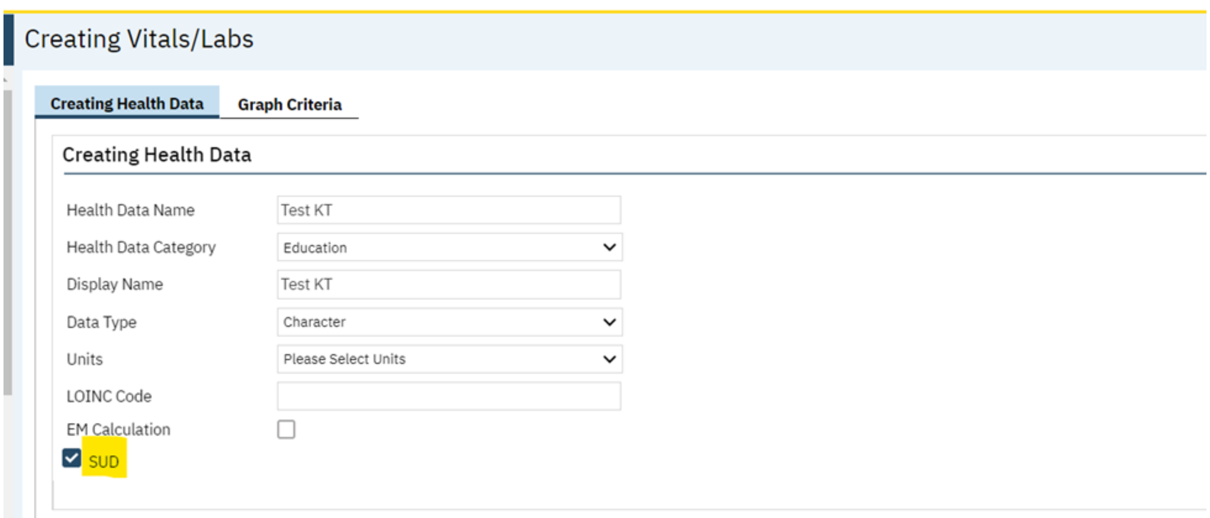
Prerequisite: System Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' Value is set as 'Yes'.

Navigation Path: Health Data Elements (Administration) --- Health Data Elements List page --- select appropriate filters --- Click on Apply Filter.

Functionality 'Before' and 'After' release:

Purpose: This is to add SUD field for determining whether the SUD data should be shared in the sharing of data in electronic interface exchanges.

With this release, SUD checkbox has been implemented in the Health Data Elements Details screen under Creating Health Data Elements section. SUDcheckbox will be displayed when Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' set to 'Yes'.



Data Model Changes: added SUD column in HealthDataAttributes Table.

Inquiries

Reference No	Task No	Description
72	EII # 125832	A new 'Date of Birth' date filter along with 'Date of Birth' column in grid is implemented in 'Inquiries' screen
73	Core Bugs # 128642	'Inquiry details' screen: User was unable to create a new inquiry due to error
74	EII # 127413	Implementation of 'Detail Screen Validation List Page'.
75	EII # 127083	Core Inquiry: ability to configure validations
76	EII # 126613	Changes in the 'Initial' tab of the 'Inquiry Details' screen.
77	EII # 125501	Added a new 'SUD' check box in 'Inquiry Details' screen
78	Core Bugs # 128673	'Inquiry screen name is displayed too small.
79	Core Bugs # 128864	'Inquiry Details' screen: Incorrect State and Zip Warning message was displayed.

Author: Savitha Siddaraju

72. EII # 125832: A new 'Date of Birth' date filter along with 'Date of Birth' column in grid is implemented in 'Inquiries' screen.

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

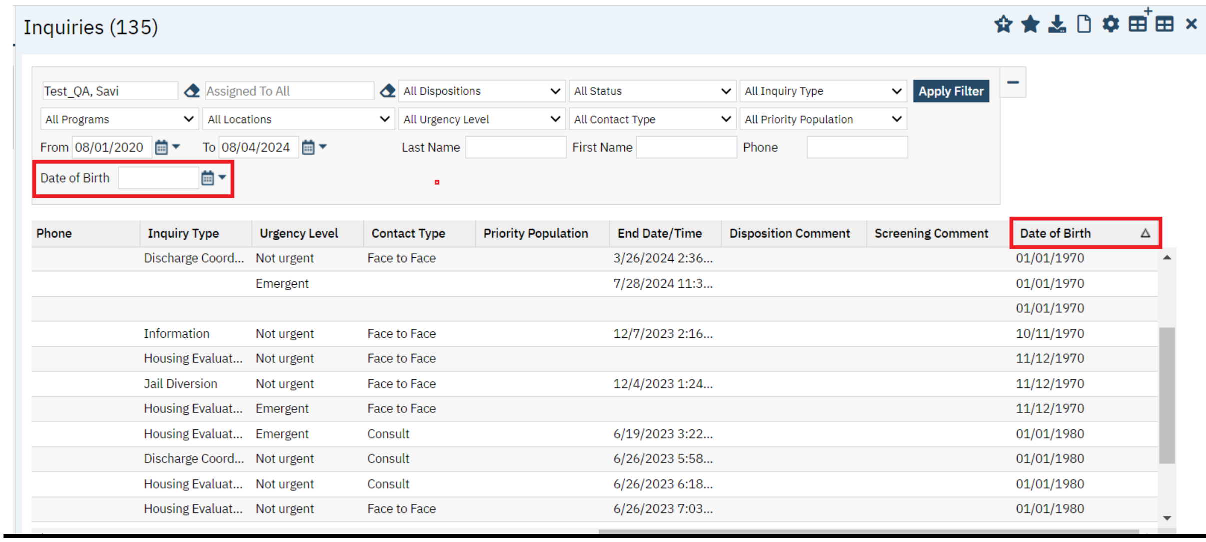
Navigation Path: 'My office' – 'Inquiries' screen – 'Date of Birth' date filter - 'Date of Birth' column grid.

Functionality 'Before' and 'After' release:

Purpose: To include an option to search by DOB on the Inquiry (My Office) list page.

With this release, a new 'Date of Birth' date filter along with 'Date of Birth' column in the grid is implemented in 'Inquiries' screen.

'Inquiries' screen:



- **Header Section:** 'Date of Birth' filter: This is date filter contain textbox with calendar popup in header section.
- **List grid Section:** Contains a new 'Date of Birth' column and details mentioned below.
    - Date will be displayed in format 'MM/DD/YYYY'.
    - The Client 'Date of Birth' is initialized from 'DOB' field in the 'Inquiry Details' screen for the corresponding client.
    - Client 'Date of Birth' will be associated for each inquiry record in the format MM/DD/YYYY.

Author: Savitha Siddaraju

73. Core Bugs # 128642: 'Inquiry details' screen: User was unable to create a new inquiry due to error.

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

Prerequisite: In Client search popup, without performing a three-way search, click on 'Inquiry (New client)' button.

Navigation Path: Client search popup -- click on 'Inquiry (New client)' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was unable to create a new inquiry for a client through client search popup, due to below error message:

Error: "input string was not in the correct format."

With this release, the above-mentioned issue has been resolved. Now, the user can create a new inquiry for a client through Client Search popup, without any error.

Author: Abhishek Naik

74. EII # 127413: Implementation of 'Detail Screen Validation List Page'.

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

Navigation Path: 'Administration' -- 'Detail Screen Validations List Page'.

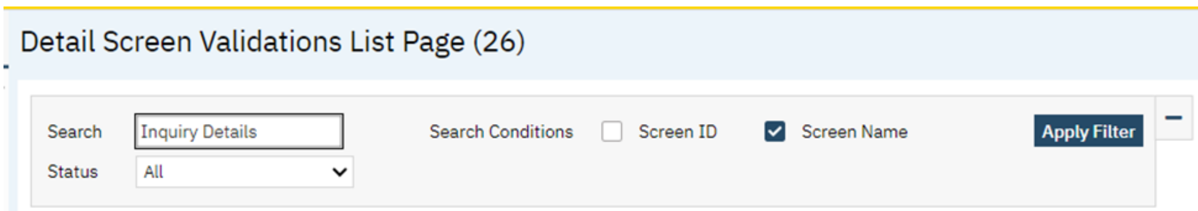
Functionality 'Before' and 'After' Release:

Purpose: Customers currently do not have the flexibility to turn on /off existing validations in the Core Inquiry screen. With this implementation, the customer will be able to activate/deactivate Inquiry detail screen validations.

Note: Currently this screen is implemented only for 'Inquiry Details' screen.

With this release, new screen 'Detail Screen Validation List Page' is implemented with following features:

'Detail Screen Validations List Page': The below mentioned details will be displayed in the 'Detail Screen Validation List Page'.



1. **Filter section**

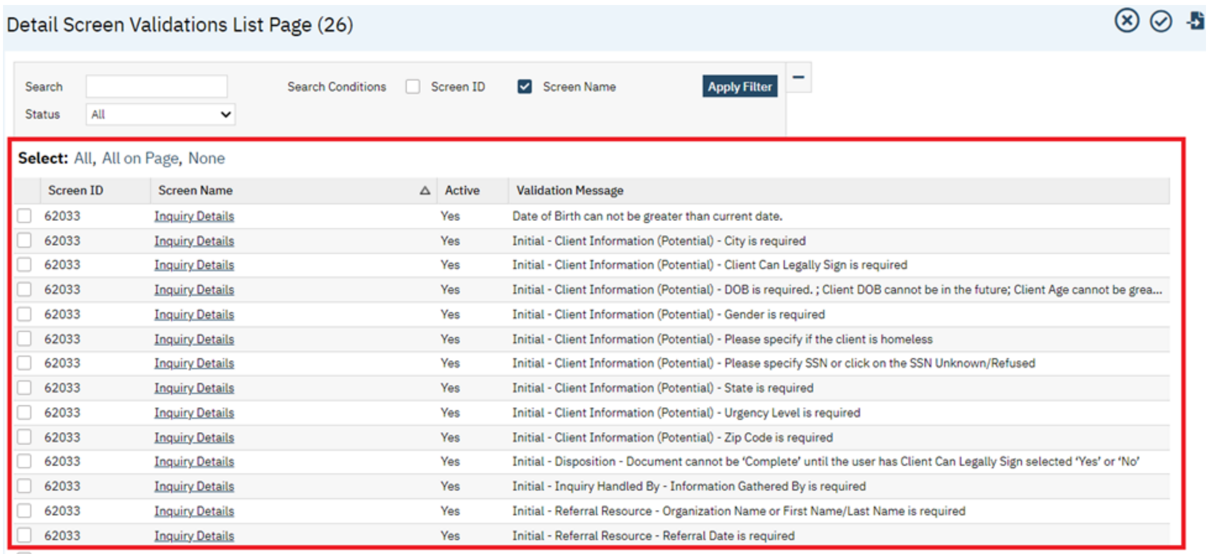
Search: This is a type-able search with the ability to search Screen ID and Screen Name. Default value in this field will be 'Inquiry Details'.

Search conditions: This is a Checkbox selection with Screen ID and Screen Name checkboxes. Screen Name will be selected by default.

Status: This is a single select dropdown with All, Active and Inactive values. Default selection will be All.

Apply Filter: Records in the grid will be displayed based on the search conditions based on click of this button.

2. **Grid section**


Detail Screen Validations List Page (26)

Search | Search Conditions | Screen ID | Screen Name | Apply Filter

Status: All

Select: All, All on Page, None

Screen ID	Screen Name	Active	Validation Message
62033	Inquiry Details	Yes	Date of Birth can not be greater than current date.
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - City is required
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Client Can Legally Sign is required
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - DOB is required. ; Client DOB cannot be in the future; Client Age cannot be grea...
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Gender is required
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Please specify if the client is homeless
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Please specify SSN or click on the SSN Unknown/Refused
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - State is required
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Urgency Level is required
62033	Inquiry Details	Yes	Initial - Client Information (Potential) - Zip Code is required
62033	Inquiry Details	Yes	Initial - Disposition - Document cannot be 'Complete' until the user has Client Can Legally Sign selected 'Yes' or 'No'
62033	Inquiry Details	Yes	Initial - Inquiry Handled By - Information Gathered By is required
62033	Inquiry Details	Yes	Initial - Referral Resource - Organization Name or First Name/Last Name is required
62033	Inquiry Details	Yes	Initial - Referral Resource - Referral Date is required

Select: All, All on Page, None

i) All – All the records in the list will be selected.

ii) All on Page – All the records in the current page will be selected.

iii) None – Records selected will be deselected.

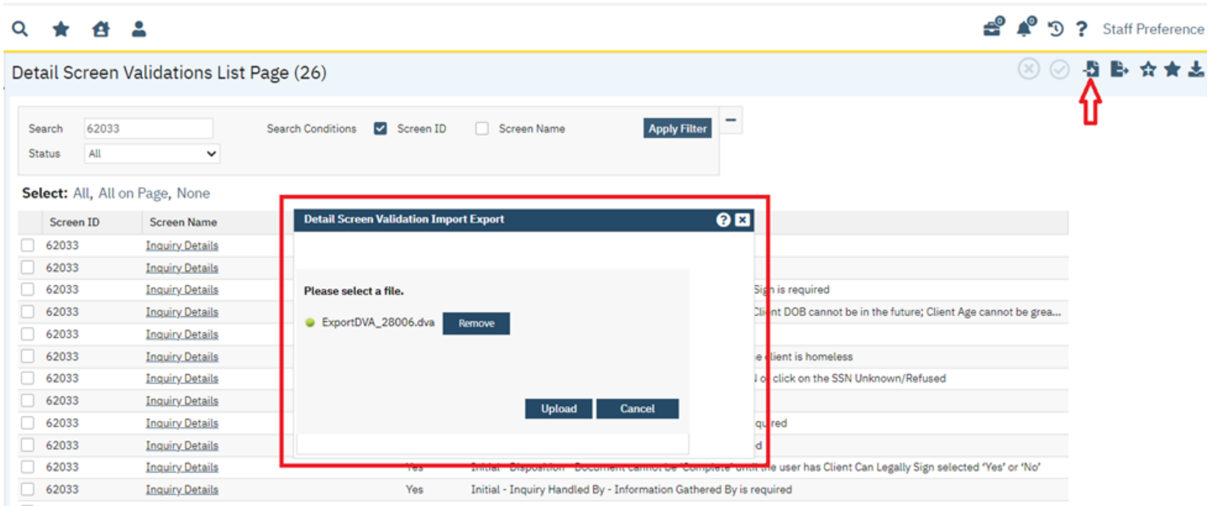
Screen ID: This column will display the Screen ID for the screen. Column values can be sorted.

Screen Name: This column will display the Screen Name. On click of hyperlink, particular details screen will be displayed. Column values can be sorted.

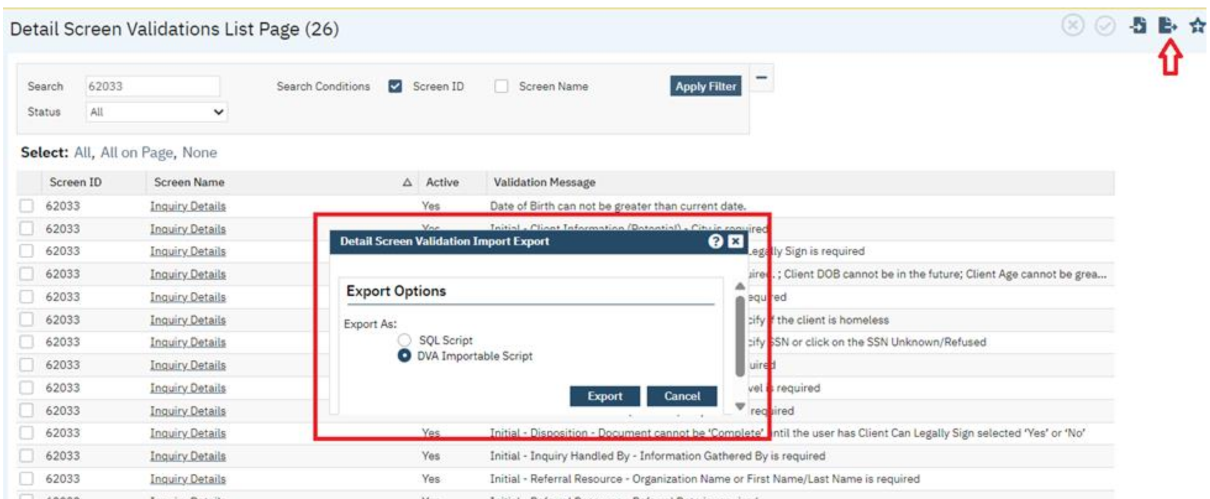
Active: This column shows if the validation is Active or Inactive. 'Yes', will be displayed if the validations are Active and 'No' in case of Inactive. Column values can be sorted.

Validation Message: This column will display the Error message displayed to user when the Validation is generated.

3. Toolbar section:

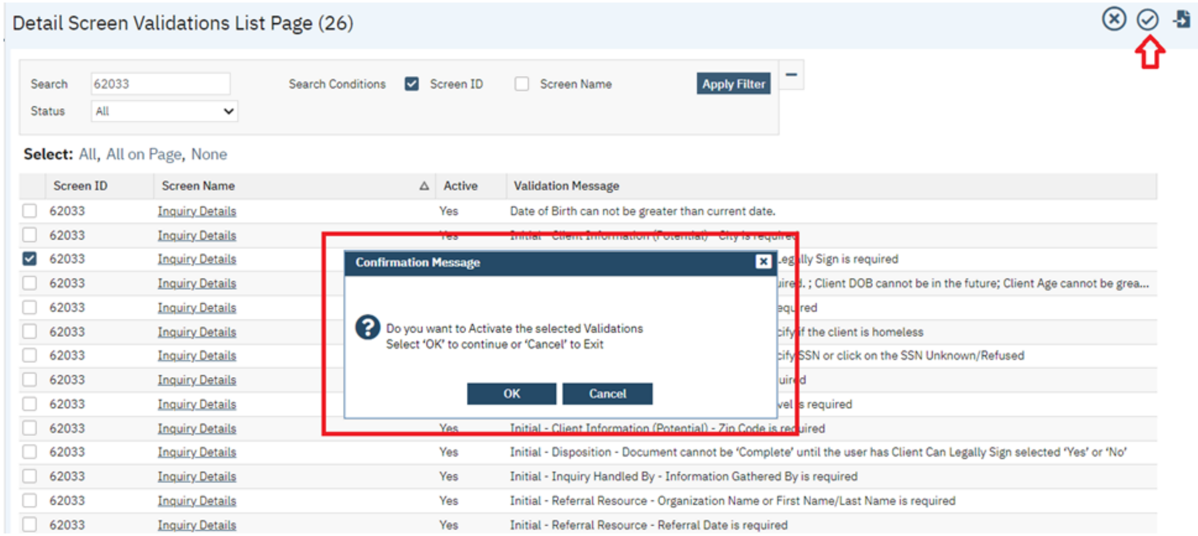


Import: User will be able to import a .dva file. This button will be always enabled.

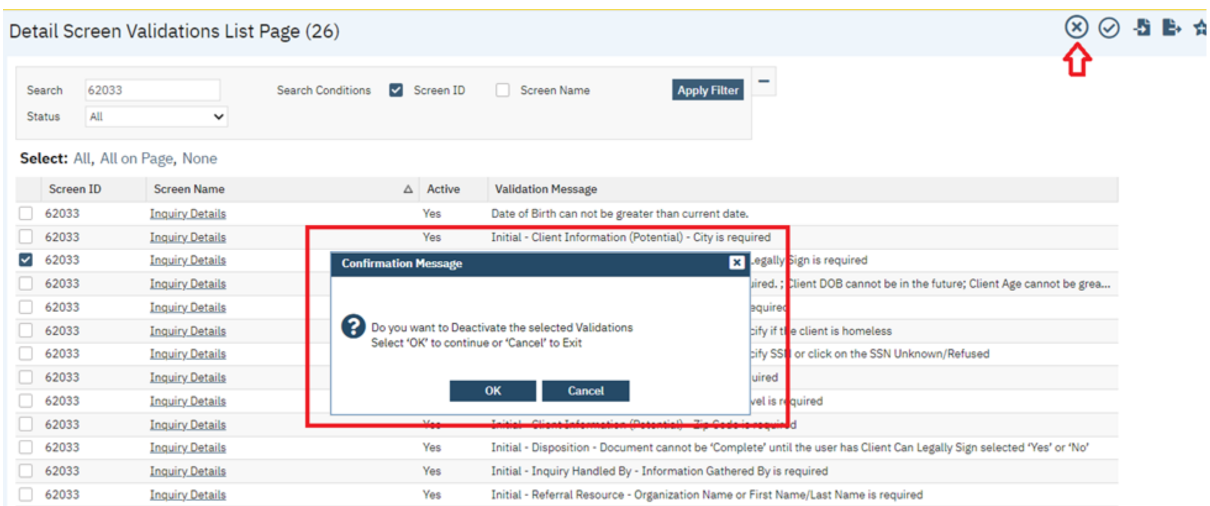


Export: User will be able to export a SQL or .dva file. This button is only active when a single Screen Name is selected in the list page.

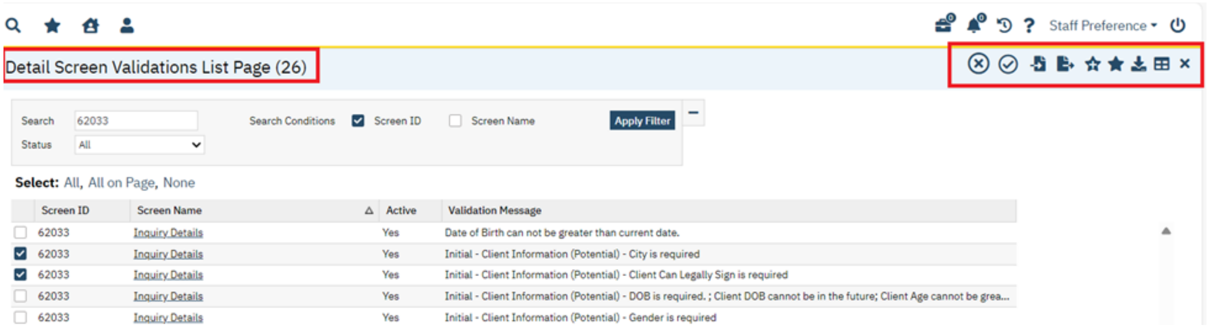
 **:** User will be able to Activate the Validations on click of this icon. When clicked on Activate icon the Pop up will display a message stating 'Do you want to Activate the selected Validations Select ‘OK’ to continue or ‘Cancel’ to Exit' with two buttons 'OK' and 'Cancel'.




: User will be able to deactivate the Validations on click of this icon. When clicked on Deactivate icon this Pop up will display a message stating ' Do you want to Deactivate the selected Validations. Select 'OK' to continue or 'Cancel' to Exit' with two buttons 'Ok' and 'Cancel'.



Favorites, Export and Column Configuration icons will be displayed in the right top corner of the list page.



Data Model Changes: New table 'ScreenValidations' is created.

Author: Santosh Huggi

75. EII # 127083: Core Inquiry: ability to configure validations

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

Navigation Path 1: 'Client' -- 'Client Inquiries' -- 'Client Inquiries' list page – click on 'New' icon – 'Inquiry Details' screen.

Navigation Path 2: 'My Office' -- 'Inquiries' -- 'Inquiries' list page -- Click on 'New' icon -- 'Inquiry Details' screen.

Navigation Path 3: 'Administration' -- 'Detail Screen Validations List Page' screen.

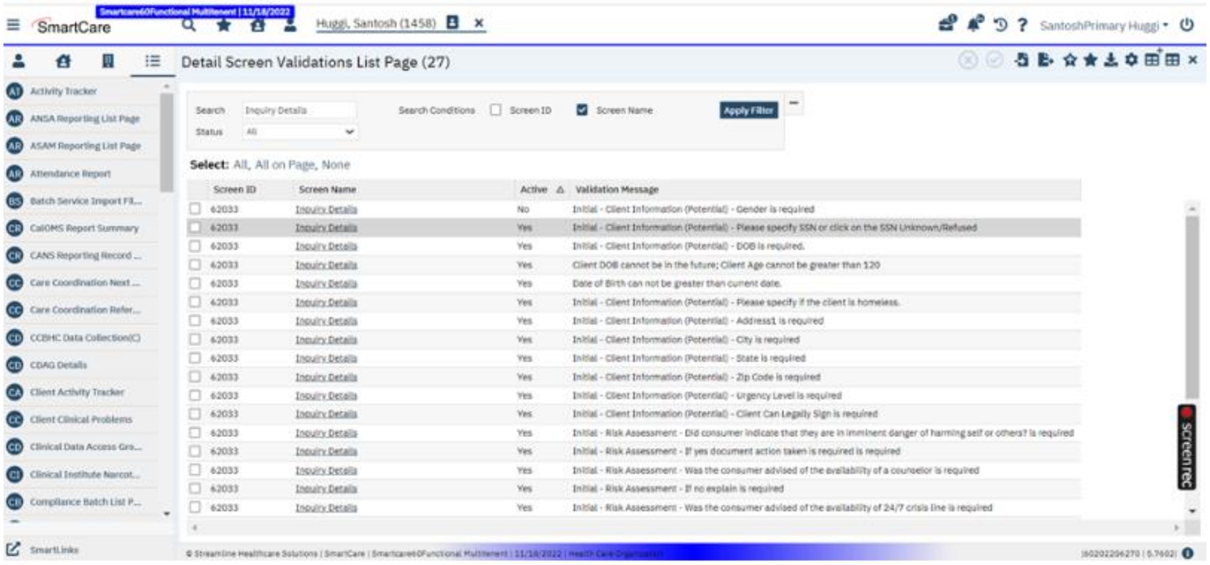
Navigation Path 4: 'Administration -- 'Configuration Keys' list page -- 'Configuration Key Details' screen.

Functionality 'Before' and 'After' release:

Purpose: The customers currently do not have the flexibility to turn on and turn off existing validations in the Core Inquiry screen. With this implementation, the customers will be able to activate/deactivate 'Inquiry Details' screen validations.

With this release, all the core 'Inquiry Details' screen validations mentioned below has been added in the 'Detail Screen Validations List Page' through core SQL insert script.

Screenshot: Detail Screen Validations List Page.



Validation messages:

- *Initial - Client Information (Potential) - Gender is required.*
- *Initial - Client Information (Potential) - Please specify SSN or click on the SSN Unknown/Refused*
- *Initial - Client Information (Potential) - DOB is required.*
- *Client DOB cannot be in the future; Client Age cannot be greater than 120.*
- *Date of Birth can not be greater than current date.*
- *Initial - Client Information (Potential) - Please specify if the client is homeless.*
- *Initial - Client Information (Potential) - Address1 is required.*
- *Initial - Client Information (Potential) - City is required.*
- *Initial - Client Information (Potential) - State is required.*
- *Initial - Client Information (Potential) - Zip Code is required*
- *Initial - Client Information (Potential) - Urgency Level is required.*
- *Initial - Client Information (Potential) - Contact Type is required*
- *Initial - Client Information (Potential) - Client Can Legally Sign is required.*
- *Initial - Risk Assessment - Did consumer indicate that they are in imminent danger of harming self or others? is required.*
- *Initial - Risk Assessment - If yes document action taken is required is required.*
- *Initial - Risk Assessment - Was the consumer advised of the availability of a counselor is required.*
- *Initial - Risk Assessment - If no explain is required.*
- *Initial - Risk Assessment - Was the consumer advised of the availability of 24/7 crisis line is required.*
- *Initial - Risk Assessment - If No, explain is required*
- *Initial - Risk Assessment - Crisis Information Provided? is required.*
- *Initial - Referral Resource - Referral Date is required.*
- *Initial - Referral Resource - Referral Type is required.*
- *Initial - Referral Resource - Organization Name or First Name/Last Name is required.*
- *Initial - Inquiry Handled By - Information Gathered By is required.*
- *Initial - Disposition - Document cannot be 'Complete' until the user has Client Can Legally Sign selected 'Yes' or 'No'*
- *Invalid Member First Name*
- *Please Enter the First Name*
- *Referraldate can not be greater than current date.*

Now, the users will be able to 'Activate' or 'Deactivate' the 'Inquiry Details' screen validations from 'Detail Screen Validations List Page' screen. When the validation is set 'Active' = 'Yes', then the corresponding validation will be displayed on the 'Inquiry Details' screen. If the validation is set 'Active' = 'No', then the corresponding validation will not be displayed.

Note:

1. When the existing configuration key 'ShowOnlyRelevantFieldsForCalMHSAOnCoreInquiry' is set to 'Yes', then Currently, core Inquiry has few sections and fields that are not relevant to specific customers. Hence those will be hidden on core 'Inquiry Details' screen. For the hidden fields validations will not be displayed on 'Inquiry Details' screen.

2. The 'Detail Screen Validations List Page' is implemented in the Azure DevOps '*Feature 345464: Screen Validation*' (Portal task: *Engineering Improvement Initiatives- NBL(I), 127413*)

Author: Savitha Siddaraju

76. EII # 126613: Changes in the 'Initial' tab of the 'Inquiry Details' screen.

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

Navigation Path: 'Client search popup' – 'Inquiry (New Client)' button - 'Inquiry Details' screen – 'Initial' tab.

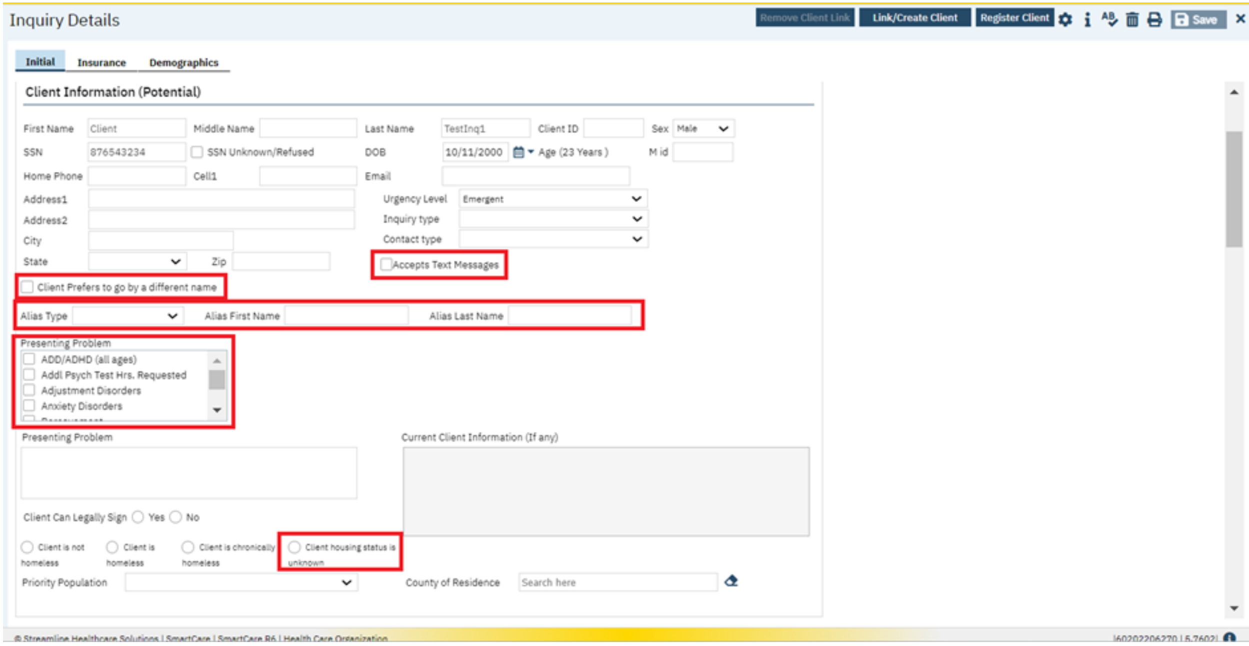
Functionality 'Before' and 'After' release:

Purpose: To implement the new fields in the 'Initial' tab under the 'Inquiry Details' screen.

With this release, the new fields (Checkbox, dropdown, Textbox, radio button) have been added to the 'Initial' tab under the 'Inquiry Details' screen.

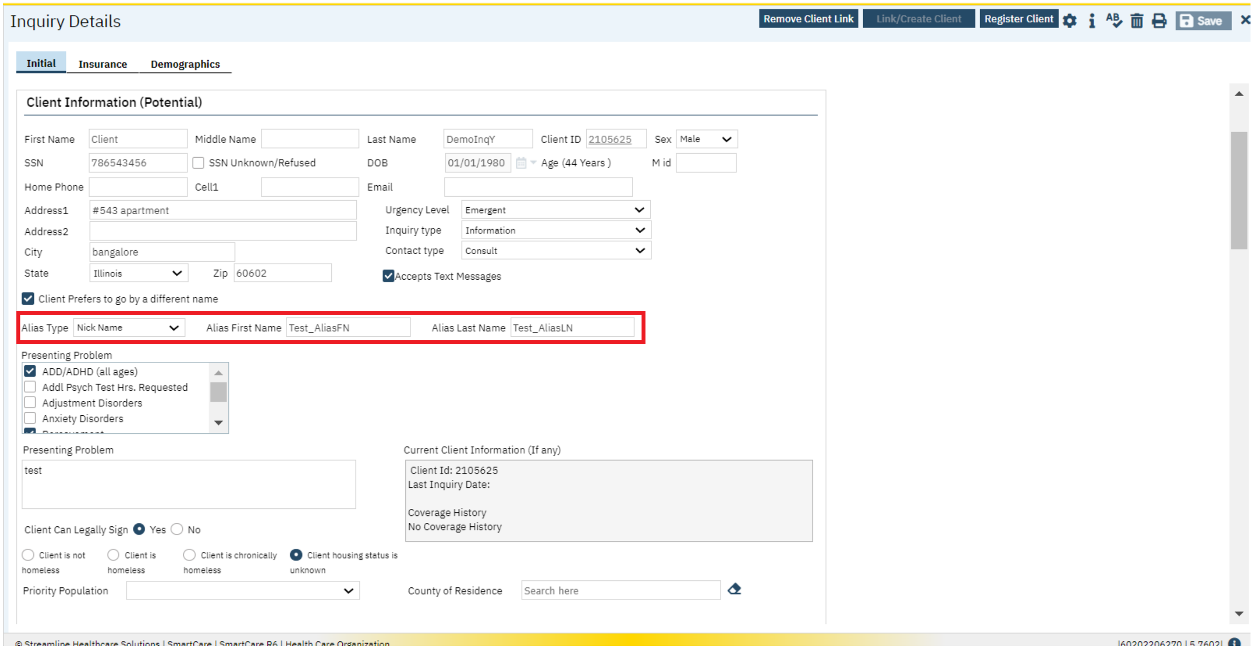
'Inquiry Details' screen:

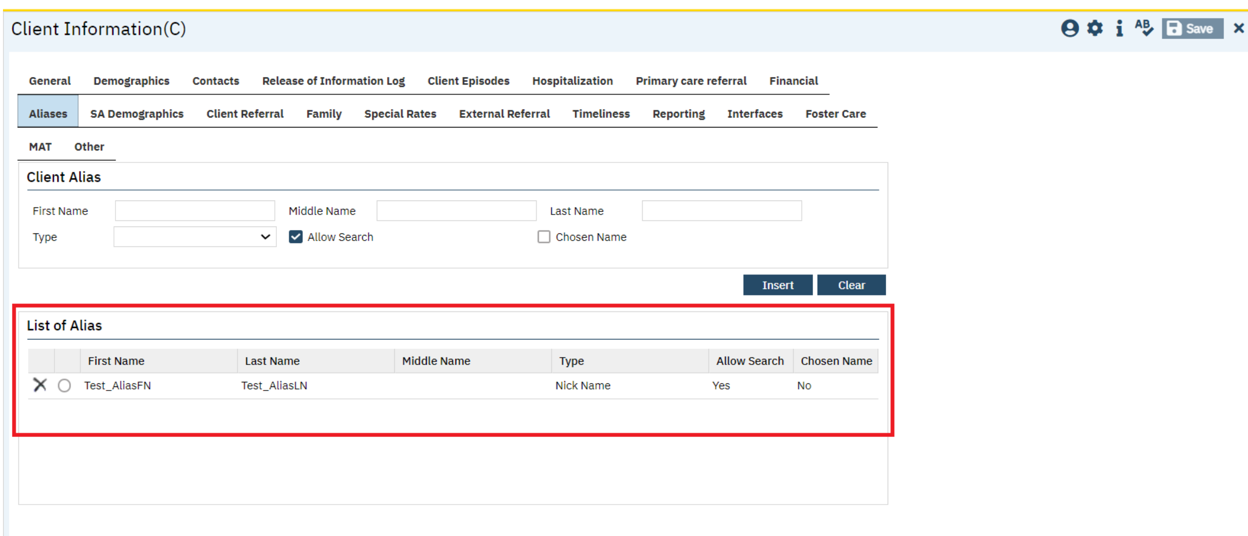
In the **'Client Information (Potential)'** section: The new fields are added which are mentioned below.



- **Client Prefers to go by a different name:** This is a checkbox field.
- **Accepts Text Messages:** This is a checkbox field.
- **Alias Type:** This is a dropdown field and the options are displayed based on 'GlobalCode Category' – 'ALIASTYPE'.
- **Alias First Name:** This is the Textbox field.
- **Alias Last Name:** This is the Textbox field.
- **Presenting Problem:** This is a multi-select dropdown checklist and the options are displayed based on GlobalCode Category – 'PresentingProblem'.
- **Client housing status is unknown:** This is a radio button.

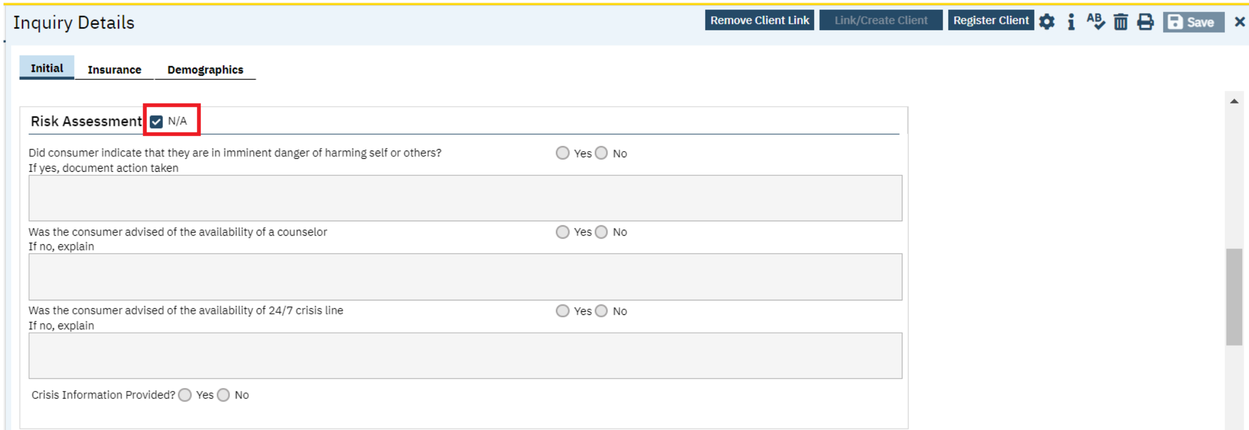
On saving the screen, the 'Alias' details ('Alias First Name', 'Alias Last Name', and 'Alias Type') which are entered in the 'Inquiry details' screen will get inserted into 'Client Information' (Aliases tab=>First Name, Last Name and Type) only if any of these values do not match (refer below screenshots).





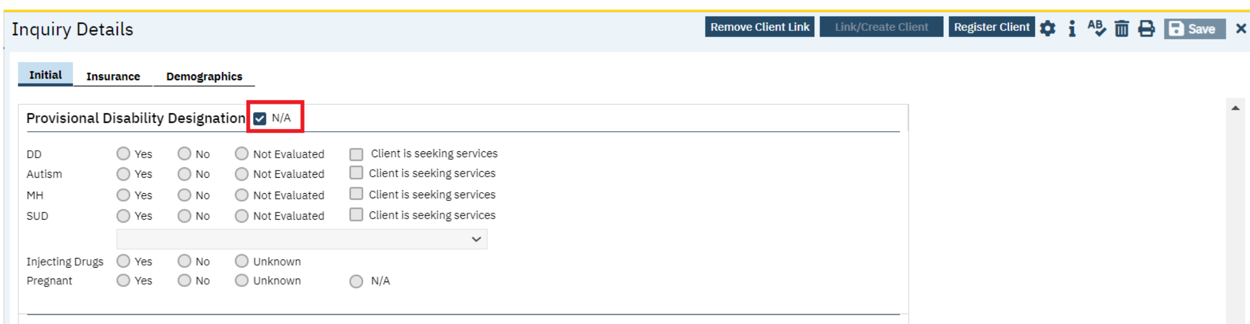
In the 'Risk Assessment' section: A new checkbox option 'N/A' is added beside the section name.

- When the "N/A" checkbox is selected, the 'Risk Assessment' section fields will be greyed out and not editable. Also, the corresponding validations in this section no longer apply.



In the **'Provisional Disability Designation'** section - A new checkbox option 'N/A' is added beside the section name.

- When the "N/A" checkbox is selected, the 'Provisional Disability Designation' section fields will be greyed out and not editable. Also, the corresponding validations in this section no longer apply.



Data Model Changes:

1. Added columns 'ClientDifferentNamePreferred', 'AliasFirstName', 'AliasLastName', 'AliasType', 'AcceptTextMessages','RiskAssessmentNotApplicable','ProvisionalDisabilityDesignationNotApplicable' in the 'Inquiries' table.

1. A new 'InquiryPresentingProblems' table is created.

Author: Savitha Siddaraju

77. EII # 125501: Added a new 'SUD' check box in 'Inquiry Details' screen.

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

Pre-requisite:

The system configuration key 'DisplaySUDCheckboxToTagDataAsSUD' is set to Yes.

Navigation Path 1: Client – Perform 3-way search – Click on Inquiry (New Client) – Inquiry details screen – Initial - Client information (Potential) section - Observe the 'SUD' check box.

Navigation Path 2: Client – Perform 3-way search – Click on Inquiry (Selected Client) – Inquiry details – Initial - Client information (Potential) section - Observe the 'SUD' check box.

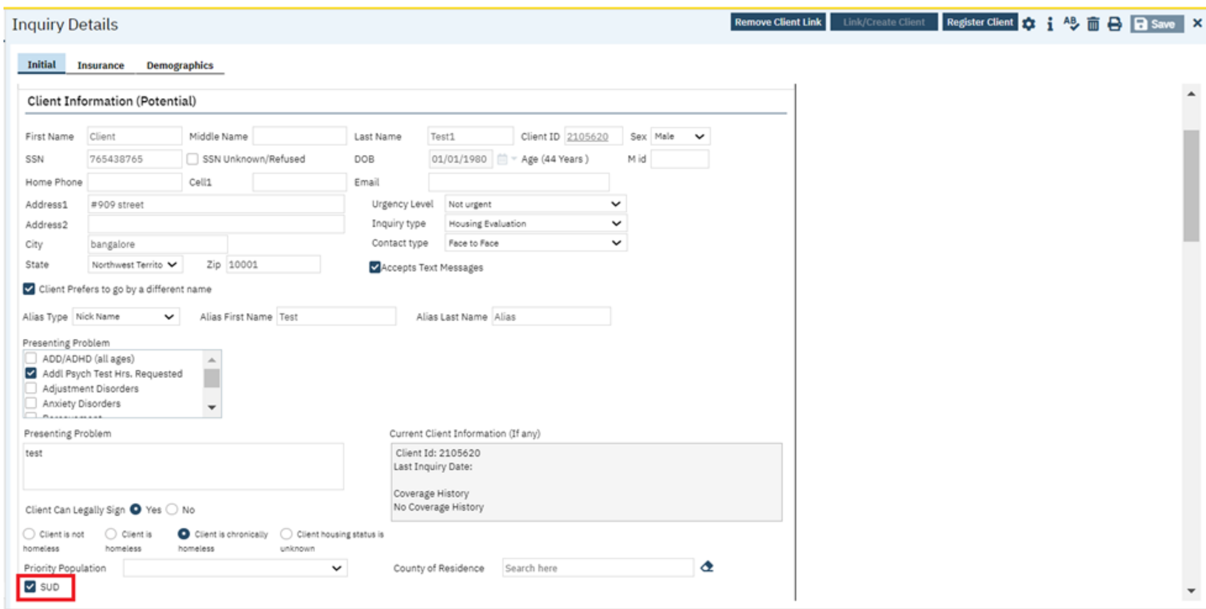
Functionality 'Before' and 'After' release:

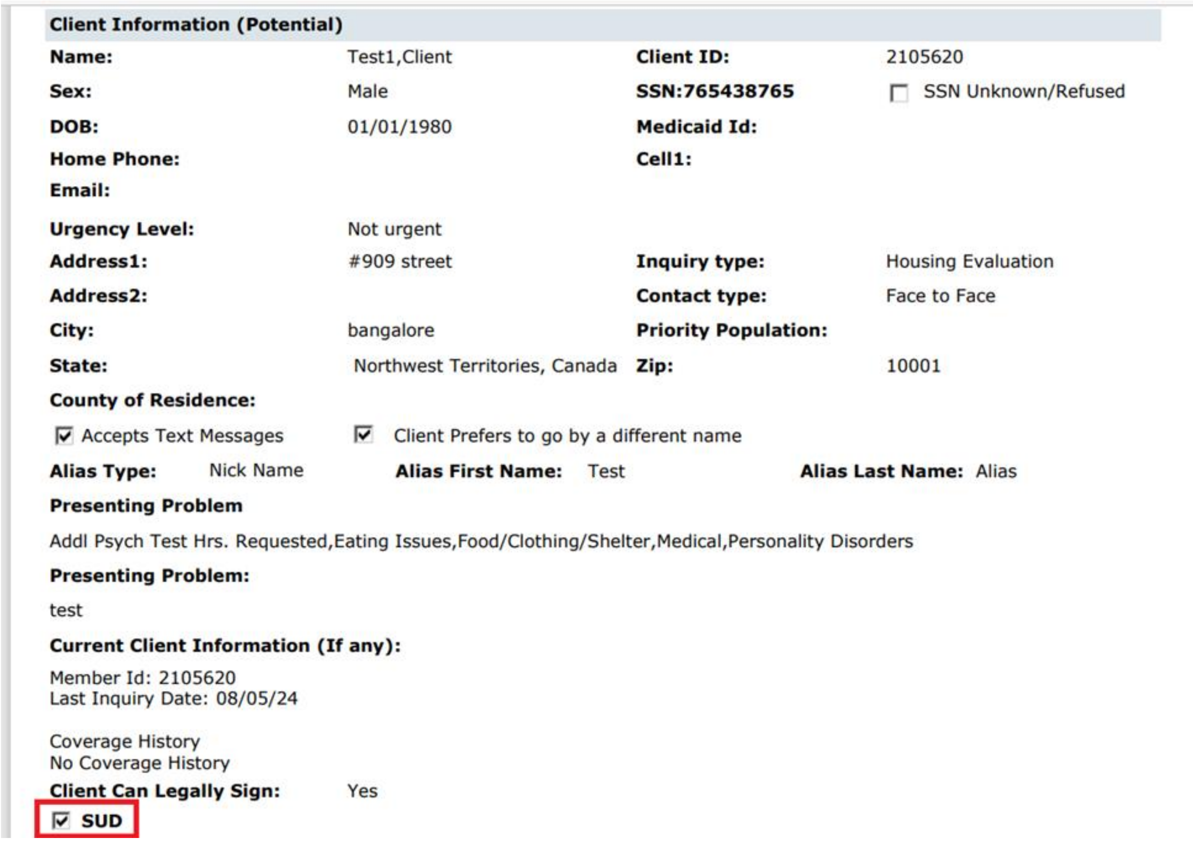
Purpose: This is to add SUD field to determine whether SUD data should be shared in the sharing of data in electronic interface exchanges.

With this release, a new 'SUD' check box is implemented based on configuration key 'DisplaySUDCheckboxToTagDataAsSUD'.

Inquiry Details screen:

When system configuration key value is 'Yes', 'SUD' check will be displayed, and the user will be able to 'Check/Uncheck' the checkbox in the Inquiry details screen.





Client Information (Potential)

Name:	Test1,Client	**Client ID:**	2105620
Sex:	Male	**SSN:765438765**	☐ SSN Unknown/Refused
DOB:	01/01/1980	**Medicaid Id:**	
Home Phone:		**Cell1:**	
Email:			
Urgency Level:	Not urgent		
Address1:	#909 street	**Inquiry type:**	Housing Evaluation
Address2:		**Contact type:**	Face to Face
City:	bangalore	**Priority Population:**	
State:	Northwest Territories, Canada	**Zip:**	10001
County of Residence:			

☑ Accepts Text Messages ☑ Client Prefers to go by a different name

Alias Type: Nick Name **Alias First Name:** Test **Alias Last Name:** Alias

Presenting Problem

Addl Psych Test Hrs. Requested,Eating Issues,Food/Clothing/Shelter,Medical,Personality Disorders

Presenting Problem:

test

Current Client Information (If any):

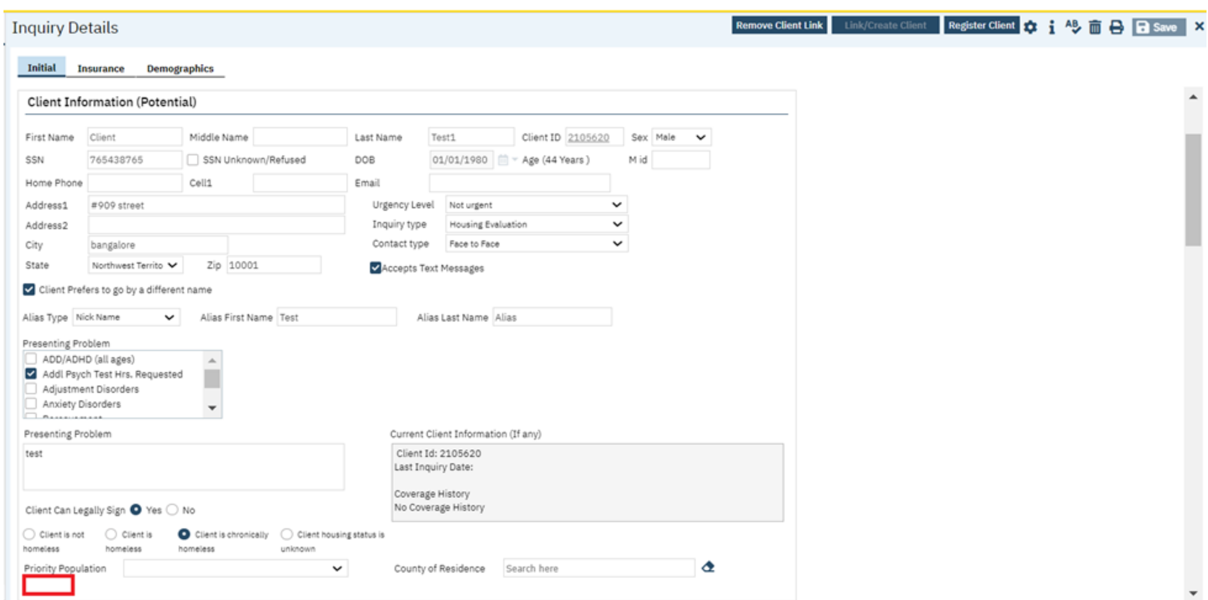
Member Id: 2105620
Last Inquiry Date: 08/05/24

Coverage History
No Coverage History

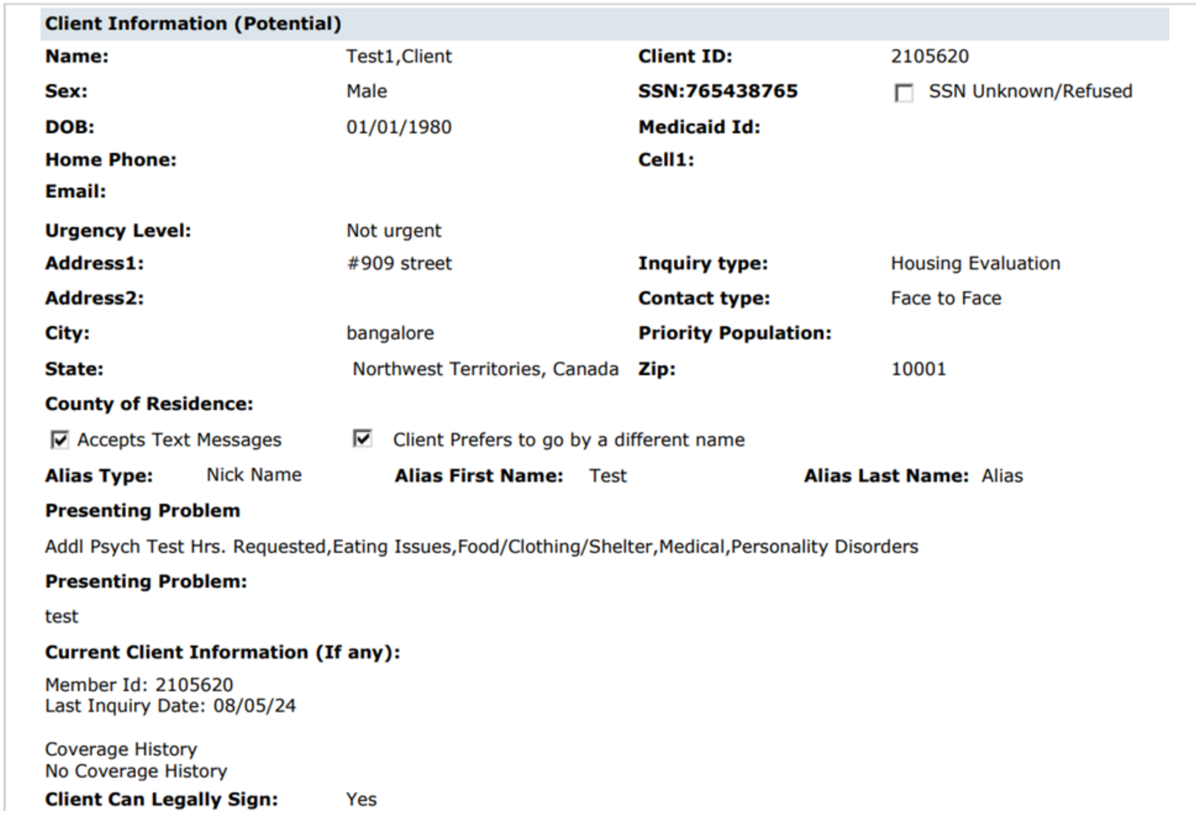
Client Can Legally Sign: Yes

☑ **SUD**

When system configuration key value is 'No', 'SUD' check is 'Hidden' in Inquiry details screen.



PDF –


Client Information (Potential)

Name:	Test1,Client	**Client ID:**	2105620
Sex:	Male	**SSN:765438765**	☐ SSN Unknown/Refused
DOB:	01/01/1980	**Medicaid Id:**	
Home Phone:		**Cell1:**	
Email:			
Urgency Level:	Not urgent		
Address1:	#909 street	**Inquiry type:**	Housing Evaluation
Address2:		**Contact type:**	Face to Face
City:	bangalore	**Priority Population:**	
State:	Northwest Territories, Canada	**Zip:**	10001
County of Residence:			

☑ Accepts Text Messages ☑ Client Prefers to go by a different name

Alias Type: Nick Name **Alias First Name:** Test **Alias Last Name:** Alias

Presenting Problem

Addl Psych Test Hrs. Requested,Eating Issues,Food/Clothing/Shelter,Medical,Personality Disorders

Presenting Problem:

test

Current Client Information (If any):

Member Id: 2105620
Last Inquiry Date: 08/05/24

Coverage History
No Coverage History

Client Can Legally Sign: Yes

Data Model Changes: The 'SUD' column is added to the 'Inquiries' table.

Author: Sachin Ranganathappa

78. Core Bugs # 128673: 'Inquiry screen name is displayed too small.

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

Navigation Path: 'Client' Search - 'Select a client' - 'Inquiry Details' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Inquiry Details' screen had limited character length for the fields 'InquirerFirstName', 'InquirerMiddleName', 'InquirerLastName', 'MemberFirstName', 'MemberMiddleName', and 'MemberLastName'.

With this release, the above-mentioned issue has been resolved. Now, The length of the following columns in the "Inquiries" table has been increased.

Inquiries:

Column Name	Existing Length	Modified Length
InquirerFirstName	20	30

InquirerMiddleName	20	30
InquirerLastName	30	50
MemberFirstName	20	30
MemberMiddleName	20	30
MemberLastName	30	50

Data Model Changes:

In the “Inquiries” table, 'InquirerFirstName', 'InquirerMiddleName', 'InquirerLastName', 'MemberFirstName', 'MemberMiddleName', 'MemberLastName ' columns lengths are increased.

Author: Savitha Siddaraju

79. Core Bugs # 128864: 'Inquiry Details' screen: Incorrect State and Zip Warning message was displayed.

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

Prerequisite: Ensure that configuration key 'ShowZipValidationOrWarningOnClientInfoAndInquiryScreens' value is set as ‘Warning’ by following the below **Path:**

Login - Configuration Keys - ‘ShowZipValidationOrWarningOnClientInfoAndInquiryScreens’ Key – Select ‘Warning’ value – Save.

Navigation Path: Login -- 'Client search popup' -- 'Inquiry (New client) button -- 'Inquiry Details' screen -- 'Initial' tab -- 'Client information (Potential)' section -- State and Zip fields.

Functionality ‘Before’ and ‘After’ release:

Before this release, here was the behavior. In the ‘Inquiry Details' screen, when a user entered both zip code and state, the below warning message was displayed even though the state and the zip code combination was correct.

Warning Message: "Zip and State combination do not exist, but you can proceed with saving"

With this release, the above-mentioned issue has been resolved. Now, the above warning message is not displayed, when a user enters both zip and state and their combination matches.

Interface

Reference No	Task No	Description
80	Core Bugs # 128584	Issues in USCDI xml.
81	Core Bugs # 128304	Immunization Configuration Details: Immunization history details was sending in the form of HL7 message based on the selected individual location for a vendor.
82	Core Bugs # 128530	Clinisync ADT screen "Create Document".

Author: Jagadeesh Raju

80. Core Bugs # 128584: Issues in CCDA xml.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. As part of generating USCDI version of CCDA xml document, the below issues were observed:

1. The default procedure name and code in XML content was commented under procedures section.
2. The Result section had special characters "<,>, &..." which were altering the XML tags and causing below additional error.

   Error tag: <1.18 NOT DETECTED.

3. In the "Record Target" sections, the Address fields had special and junk characters, which were causing errors.

With release, the above mentioned issue has been resolved. Now, the system is generating USCDI xml as per the below changes:

1. The commented portion is removed from the procedure section.
2. The special characters in XML are handled for all the sections.
3. The special characters in the Address section are displayed in the XML readable format.

Author: Jagadeesh Raju

81. Core Bugs # 128304: Immunization Configuration Details: Immunization history details was sending in the form of HL7 message based on the selected individual location for a vendor.

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

Navigation Path 1: Administration - Immunization Registry List - Immunization Configuration Details - Sending Facility section - Location Where immunizations can be administered drop down - 'Select all'.

Navigation Path 2: 'Client' - Immunizations - New- Immunizations Details - Fill all details under General Tab, and select 'Location where immunization administered under Immunization Details tab – Save.

Navigation Path 3: 'Client' - 'Immunization Transmission Log' list page - 'Click to Send Client Immunizations' Icon on Toolbar - Select Vaccine Name on Client Immunizations pop up - Click on 'Send'.

Navigation Path 4: 'Administration' - 'Messages Interface' - 'Messages Interface' list page - 'Message Interface Detail' Detail page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Immunization history details were sent in the form of HL7 message based on the selected individual location for a vendor, in the Immunization Configuration Details screen OR entries of vendor and location mapped details in "HL7CPVendorLocations" table.

With this release, the above mentioned issue has been resolved. Now, a new column "ImmunizationAllLocations" is added to the HL7CPVendorConfigurations table to handle the "Select all" locations from the Immunization Configuration Details page. Now, the user can send the immunization history details in the form of HL7 messages to a single vendor or all vendors based on the 'Select all' locations in the Immunization Configuration Details.

Data Model Changes: 'ImmunizationAllLocations' column is added in 'HL7cpvendorconfigurations' table.

Author: Jagadeesh Raju

82. Core Bugs # 128530: Clinisync ADT screen "Create Document".

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

Navigation Path 1: 'Client' -- 'ADT' List page -- ADT Detail page.

Navigation Path 2: 'Client' -- Documents list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked on the 'Create Document' button on ADT Detail page (Client), the system was not creating 'ADT' document and was not displaying under Documents list page.

With this release, the above-mentioned issue has been resolved. The system creates ADT document when the user clicks on the 'Create Document' button under the ADT detailed page. Also, the ADT document is displaying under Documents list page.

Manage Staff

Reference No	Task No	Description
83	EII # 128183	Implemented a logic on the staff detail screen when changes are made in the Staff's Role Permission /Client Access Overrides tab.

Author: Niroop Hassan

83. EII # 128183: Implemented a logic on the staff detail screen when changes are made in the Staff's Role Permission /Client Access Overrides tab.

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

Prerequisite: The column 'RefreshPermissionsAfterUpdate' is set to 'Y' in Screens table.

Navigation Path 1: 'Administration' – 'Staff/Users (Logged in as Admin staff) 'Staff/Users' list page – Click on required staff name hyperlink(any other staff) – 'Staff Details' page – Click on 'Client Access Overrides' tab – 'Click on 'Add To List' button in 'Denied Clients' section – 'Client Search' popup – Select the required client and click on 'Select' button – Click on 'Save' icon.

Navigation Path 2: 'Administration' – 'Staff/Users(Logged in as Admin staff)) - 'Staff/Users' list page – Click on required staff name hyperlink (any other staff)– 'Staff Details' page – Click on 'Client Access Overrides' tab – 'Click on 'Add To List' button in 'Allowed Clients' section – 'Client Search' popup – Select the required client and click on 'Select' button – Click on 'Save' icon.

Navigation Path 3: Administration' – 'Staff/Users (Logged in as Admin staff) - 'Staff/Users' list page – Click on required staff name hyperlink(any other staff) – 'Staff Details' page – 'Roles/Permissions' tab – Select any required Permission type and grant/deny the permissions and click on 'Save' icon.

Functionality 'Before' and 'After' release:

Before this release**,** call to stored procedure **'**ssp_RefreshStaffClients' was happening after the user re-login only, even when changes were made in the Staff's Role Permission /Client Access Overrides tab of the Staff Detail Page and saved.

With this release, a logic is implemented to call ssp_RefreshStaffClients when changes are made in the Staff's Role Permission /Client Access Overrides tab of the Staff Detail Page and saved. This doesn't require relogging to see the changes.

MCO (Managed Care Organization)

Reference No	Task No	Description
84	EII # 125499	Added SUD check box in Billing Code Details and Authorization Code Details screen.
85	EII # 124322	MCO Adjudication Contract Rate Logic: Contract rate to check the 'Rendering provider's' Staff Degree matches with the contract rate license.
86	EII # 127548	Implementation of MCO Site tab in Program Details screen.
87	EII # 127549	Implementation of Provider Contracts Templates.
88	Core Bugs # 128480	The provider contract name is incorrectly displayed in the 'Contract Name' filter on the 'Contract Rate Details' tab of the 'Contract Rates Details' screen.
89	EII # 127550	Initializing the diagnoses from claims to service in the 'Service from Claims process'.

Author: Archana Govindappa

84. EII # 125499: Added SUD check box in Billing Code Details and Authorization Code Details screen.

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

Prerequisite: Administration – Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' – Select Value 'Yes'.

Navigation Path 1: Administration – Billing Codes – Click on 'New' icon – Billing code details – 'Billing Code Modifiers' tab.

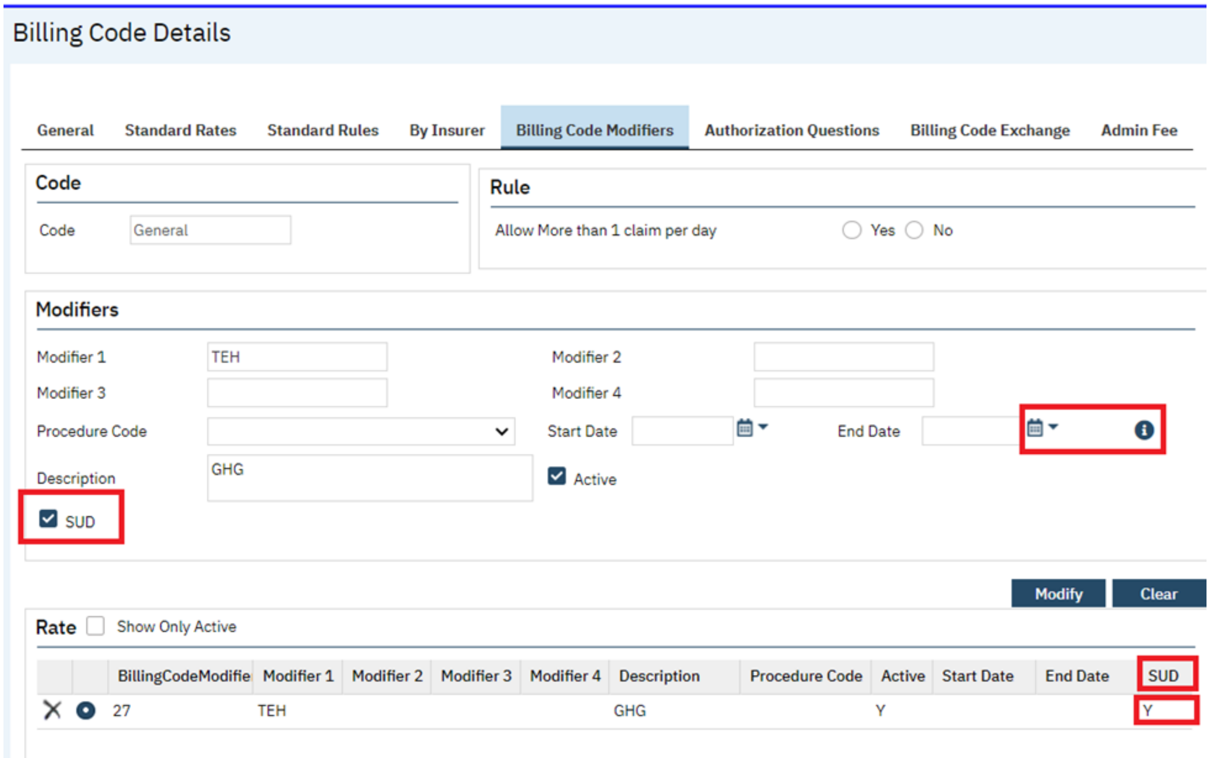
Navigation Path 2: Administration – Authorization Codes – Click on 'New' icon – Authorization code Details – 'General' tab.

Functionality 'Before' and 'After' release:

Purpose: This is to add SUD field to determine whether the SUD data should be shared in the sharing of data in electronic interface exchanges.

With this release, the SUD checkbox is implemented in 'Billing Codes' and 'Authorization Code details' screens when Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' set to 'Yes'. The value of this key is used to show/hide the newly introduced 'SUD' checkbox.

A. In 'Billing Codes Details' Screen:



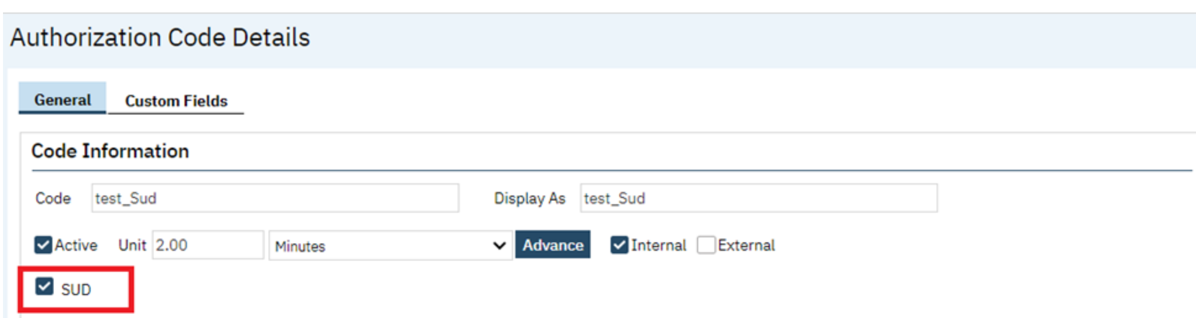
1. 'SUD' check box is implemented in the 'Modifiers' section of the 'Billing Codes Modifiers' tab.

2. 'SUD' column is implemented in the existing 'Rate' grid.

3. If the user selects the 'SUD' check box in the 'Modifiers' section and clicks the insert button, then SUD column will be displayed as 'Y' in the grid. If SUD check box is unchecked in the 'Modifiers' section and clicks on insert button, the SUD column will be displayed as 'N' in the grid.

4. The End Date and Info icon is aligned.

B. In 'Authorization Codes Details' Screen:



The 'SUD' check box is implemented in the 'Code Information' section of the 'General' tab.

Data Model Changes: SUD column has been added in AuthorizationCodes and BillingCodeModifiers tables.

Author: Renuka Gunasekaran

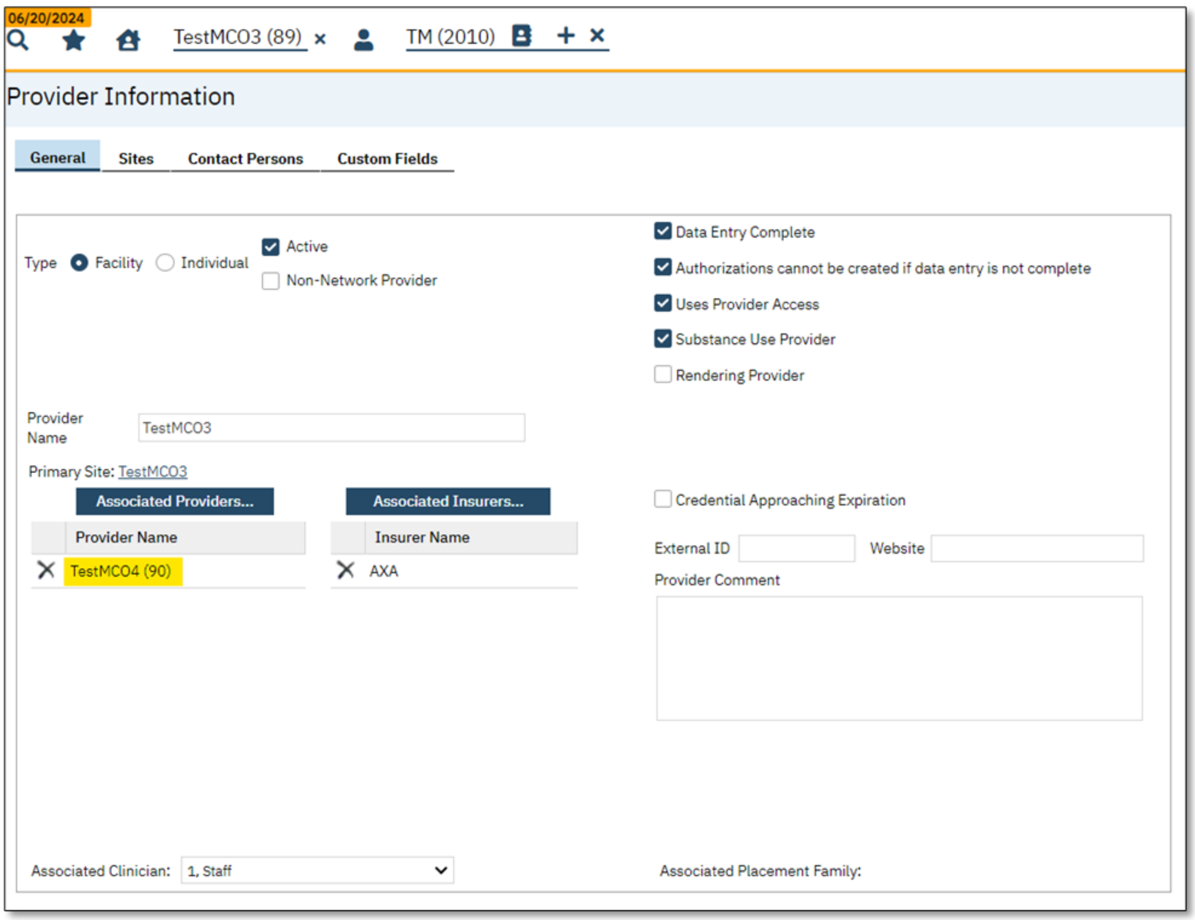
85. EII # 124322: MCO Adjudication Contract Rate Logic: Contract rate to check the 'Rendering provider's' Staff Degree matches with the contract rate license.

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

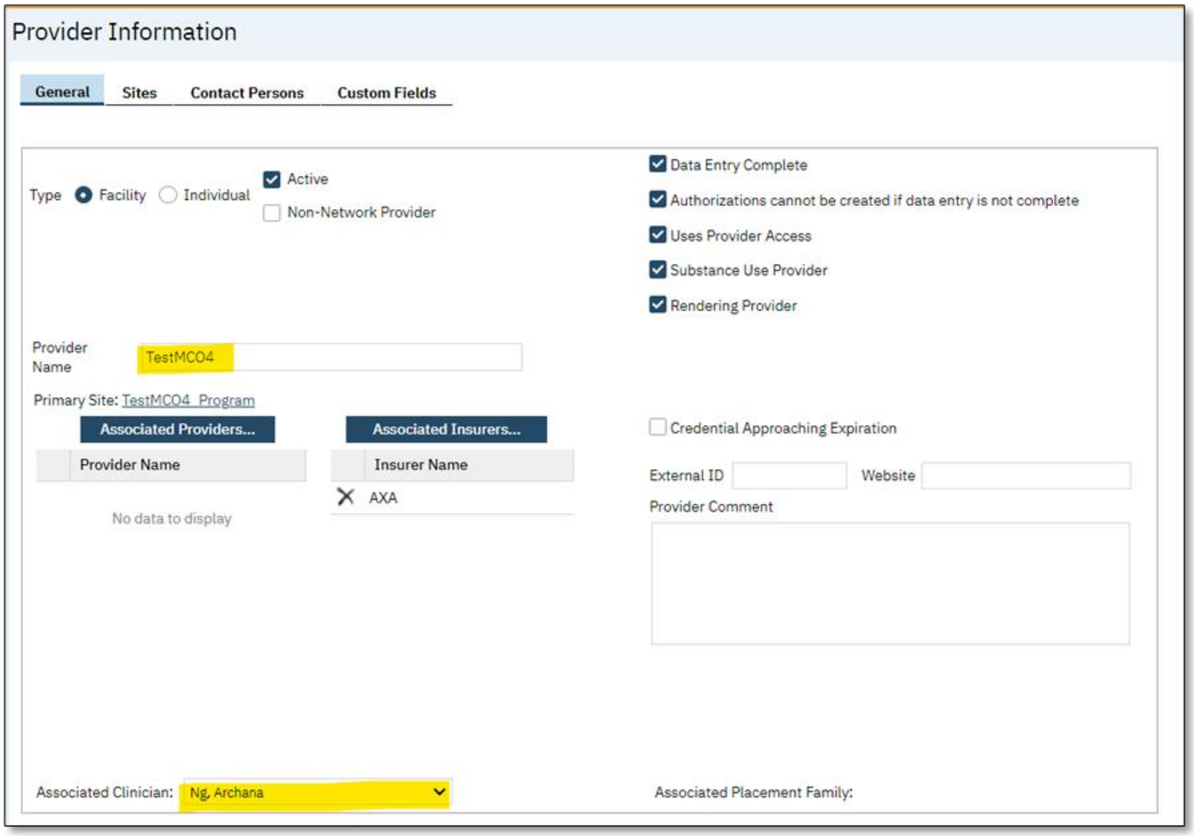
Prerequisites:

1. Setup for mapping Degree with rendering Provider Staff:

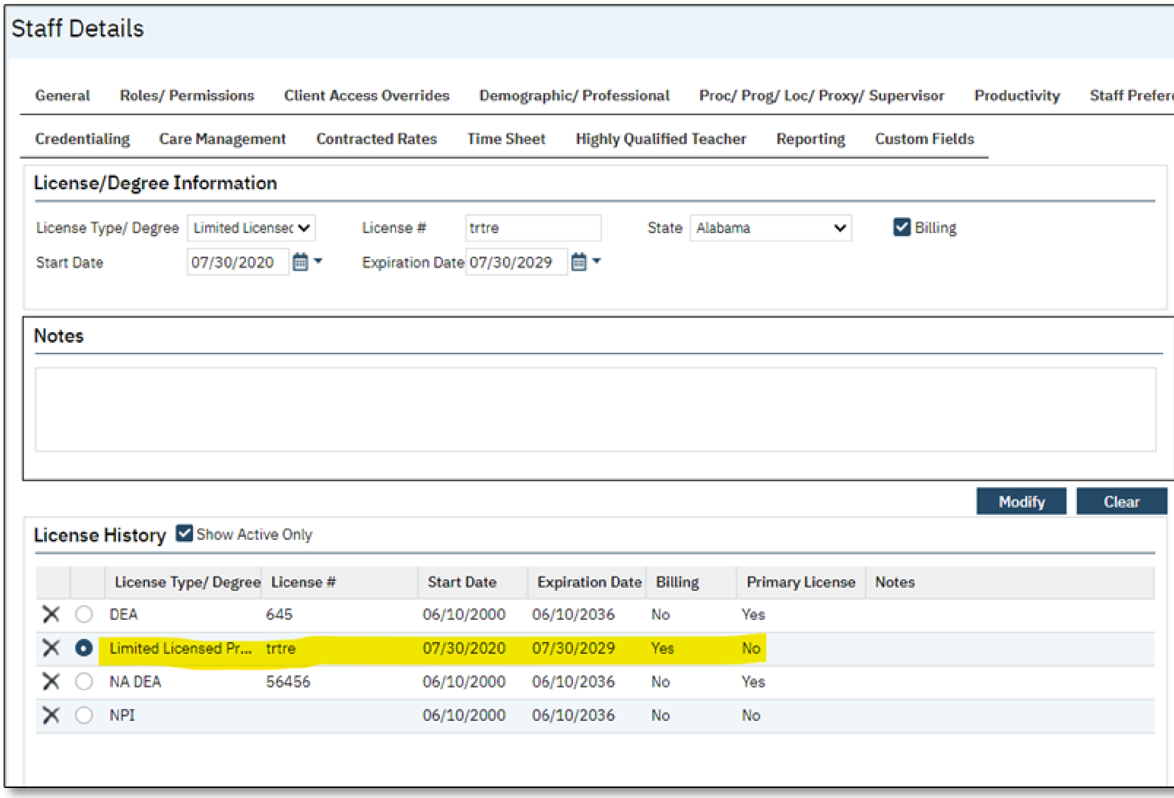
Provider Contract (My Office) - Select Provider (TestMCO3) - Provider information - Associate the provider (TestMCO4)



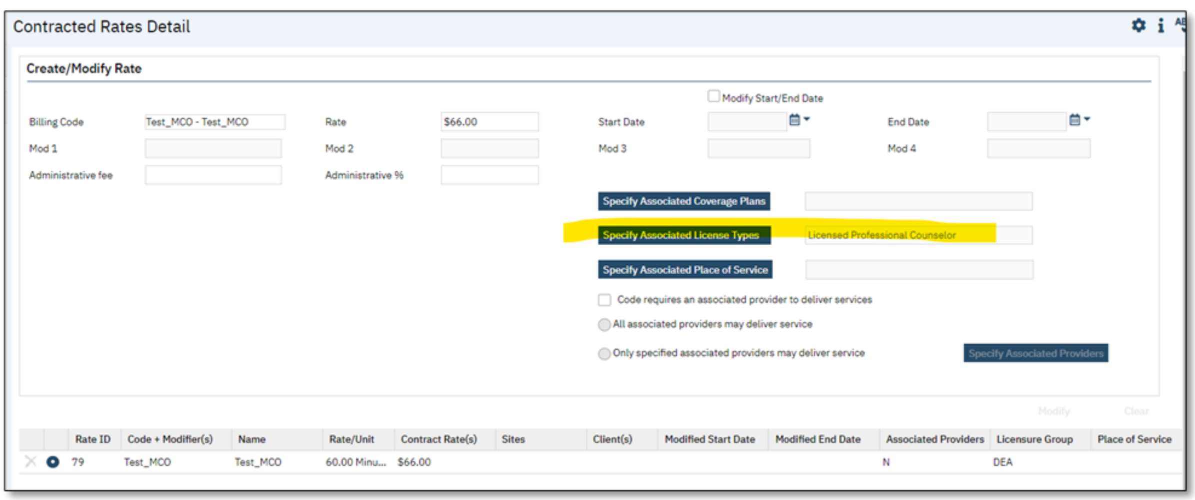
Navigate to Associated rendering provider (TestMCO4) - select Staff (Ng, Archana) from 'Associated Clinician'



Staff/Users - 'Staff Details' - 'License/Degree' - add License (Ex: Limited Licensed Professional Counselor as a Degree) and Also, Staff Degree Billing ='Yes'

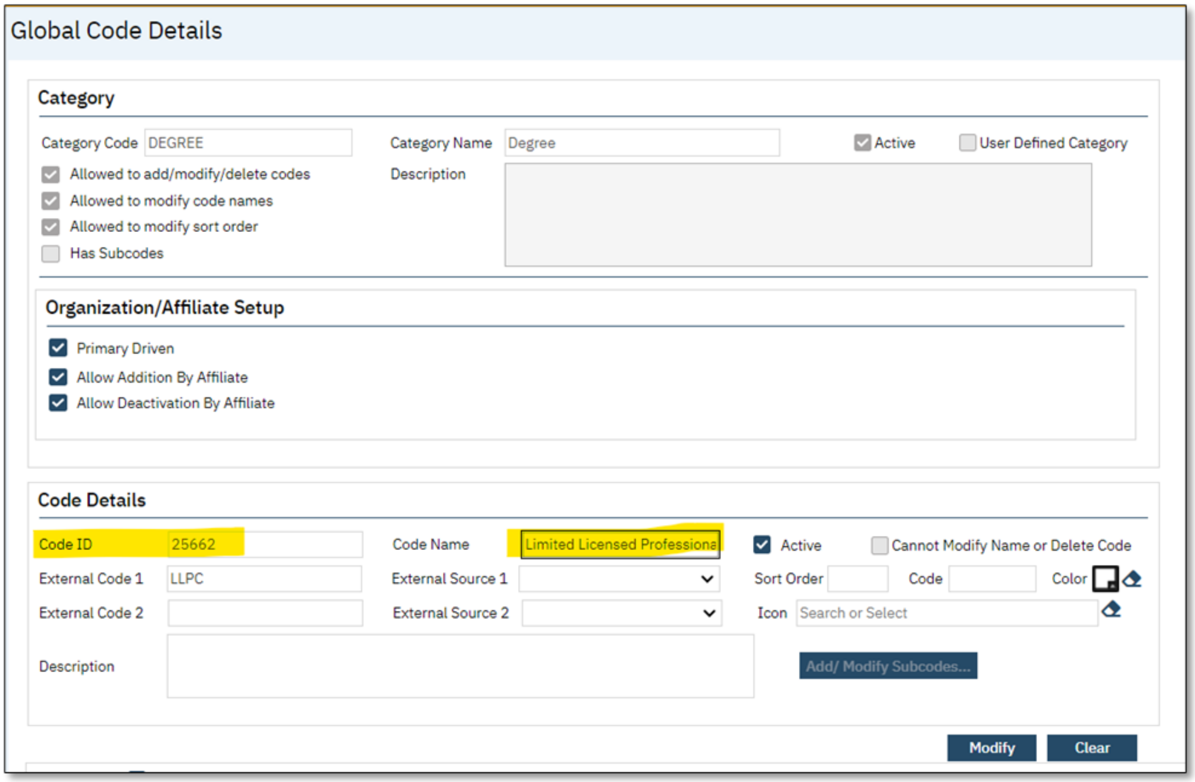


Navigate to Provider Contract (My Office) - Provider Contract (Provider) - Contracted Rates - 'Contracted Rates Detail' - Add the same License (Limited Professional Counselor) which is used in Staff/Users License tab.

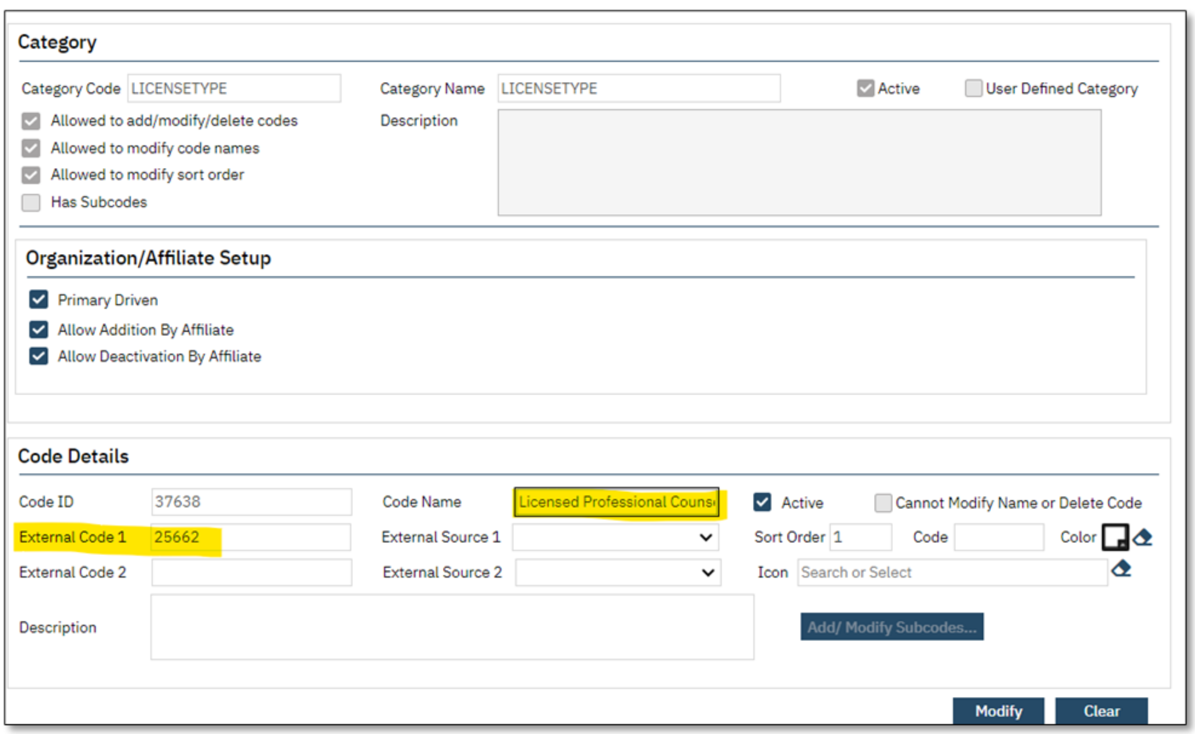


2. **Setup for Mapping LICENSETYPE. ExternalCode1 = The global code id of the category 'DEGREE'.**

Navigate to 'Global Codes (Administration) - 'Degree' Global Code Category - Select the same Degree - Copy the Global Code ID (25662)



Select 'LICENSETYPE' -> Map the ID of 'degree' in 'External Code 1' field.



Navigation Path: 'My Office' - 'Claims' - Select 'client' - 'Claim line Entry screen' – Select 'Rendering provider' from service line - Save - Claim Line Details screen - 'Select Action' – Adjudicate.

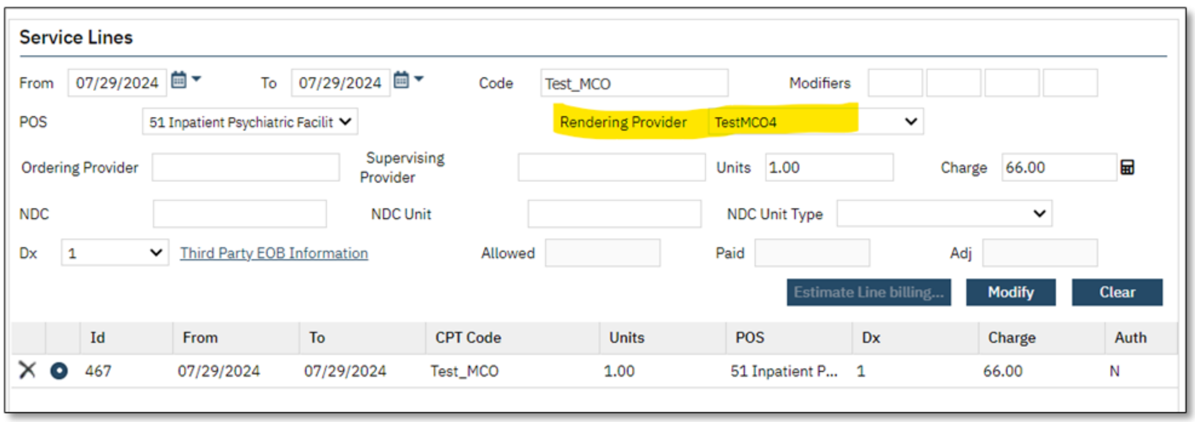
Functionality 'Before' and 'After' release:

Purpose: Implemented adjudication Contract Rate Logic, based on the staff degree and rendering provider License.

With this release, a new Logic has been implemented in the existing adjudication rule 'No rate can be found for this claim line'.

In this implementation, the Contract rate will check the 'Rendering provider's' Staff Degree matches with the contract rate license.

- When adjudicating, the claim line will get approved when the claim line's rendering provider's staff Degree has the same degree of the contract license.
- The claim line will get denied when the claim line's rendering provider's staff Degree does not match with the contract rate license and the claim line will denied with a reason 'No rate can be found for this claim line'.



Author: Renuka Gunasekaran

86. EII # 127548: Implementation of MCO Site tab in Program Details screen.

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

Navigation Path 1: 'Administration' - 'Configuration Key' -' ShowMcoTabInProgramDetails'.

Navigation Path 2: 'Administration' - 'Programs' -Select a program - 'Program Details' - 'MCO Site' tab.

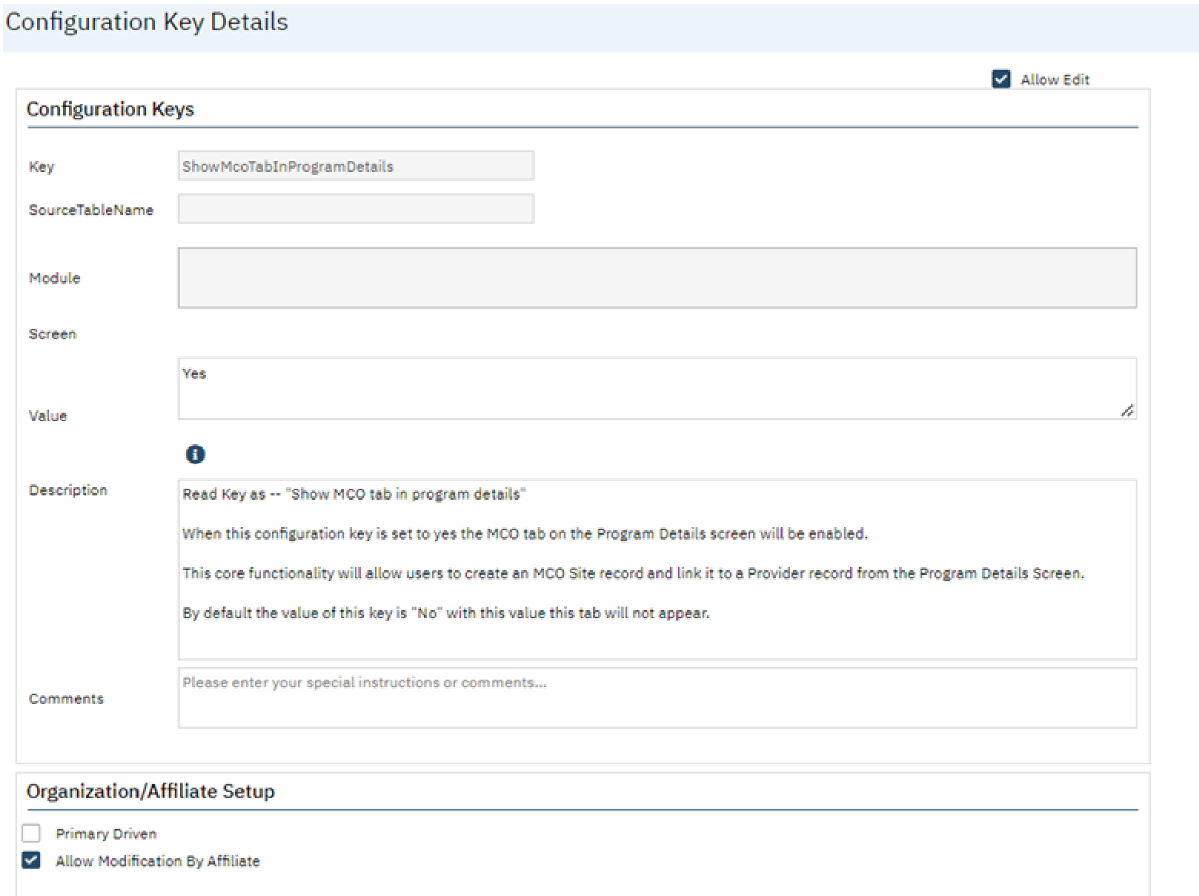
Functionality 'Before' and 'After' release:

Purpose: To implement fields to the program that will create a Site record and Map the provider with site from Program screen.

With this release, a new Configuration key 'ShowMcoTabInProgramDetails 'has been introduced to enable the 'MCO Site' tab in the 'Programs Details' screen. This is required to map the 'Provider' with the 'Site'.

Set up:

'MCO Site' tab is enabled when the '**ShowMcoTabInProgramDetails**' system configuration key is set as 'Yes' and 'MCO Site' tab will not appear when the configuration key as 'No'. Default value is 'No'.



System Configuration Key Details:

Key: ShowMcoTabInProgramDetails

Read Key as: Show MCO tab in program details.

Allowed Values: Yes, No

Default Value: No

Modules: SCMMCO

Description:

When this configuration key is set to Yes, the MCO Site tab on the Program Details screen will be enabled.

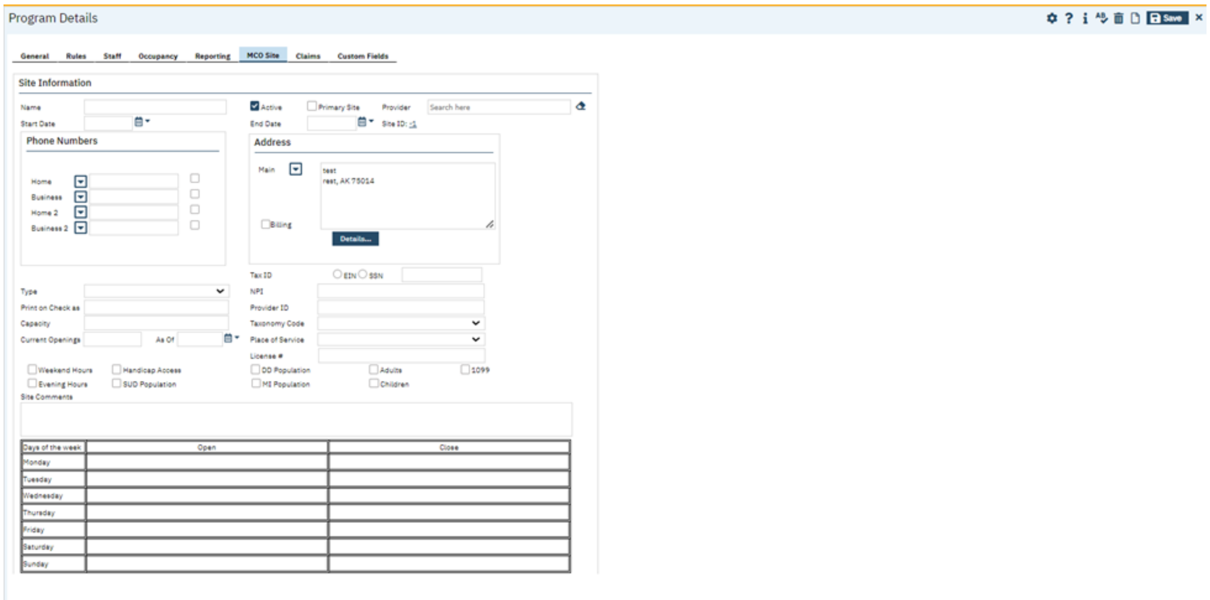
This core functionality will allow users to create an MCO Site record and link it to a Provider record from the Program Details Screen.

By default, the value of this key is "No". With this value, the MCO Site tab will not appear.

In the MCO Site tab, the below sections will be displayed:

- Site Information
- Phone Numbers
- Address

'MCO Site' Tab in 'Program Details' Screen:



Site Information section:

Name: This is a text box field and Site name will be mentioned in this field. After save, site record will get created against the provider

Active: This is the check box. Based on the selection, Site will be active or inactive for the mapped provider and this is a required field.

Primary Site: This is the check box, based on the selection it will update the site as 'Primary site' for the mapped provider

Provider: This is the searchable textbox and this will display the provider based on the staff permission.

(Navigation Path for staff permission: 'Administration' ->'Staff/Users' -> 'Staff Details' -> 'Care Management' tab ->'Permission All Providers/Click on 'Add providers' ->Select the required providers for that staff')

Start Date and End Date: The site's created start and end dates will be mentioned in using the Start and End date fields.

Phone Numbers section:

- **Home** – This is a text box field. This field is initialized to Home and phone number can be mentioned here with proper format.
- **Business** – This is a text box field. This field is initialized to Business and phone number can be mentioned here with proper format.
- **Home 2** – This is a text box field. This field is initialized to Home2 and phone number can be mentioned here with proper format.

- **Business 2** – This is a text box field. This field is initialized to Business2 and phone number can be mentioned here with proper format.

Address Section:

Address field:

- The address is initialized with the value as 'Main'.
- Address Type can be changed by clicking on Dropdown icon and three different address types will be available, 'Main', 'Office', 'Office2'
- Address textbox will be displayed with Details… button.
- On clicking Details button, another popup with Street, City, State, Zip Code fields entry option will be displayed with OK and Cancel buttons.

Billing: This is the check box, if this is selected, then this Address will be considered as Billing Address.

TaxID: This is a radio button field. This field has two options (SSN and EIN) and it is a required field. A text box will be displayed to enter SSN / EIN and this is a required field.

Type: This is a dropdown field and values will be pulled from Global Code Category '**SITETYPE**'

NPI: This is a textbox field and accepts only integer. Validation will be displayed if the same NPI value already exist for the different provider.

Validation message: "NPI already exists for another Provider".

Print on check as: This field is to enter the value of 'Print On Check As' In the Check.

Provider ID: This is a text box field and accepts only the integer value.

Capacity: This is a text box field and accepts only the integer value.

Taxonomy Code: This is a dropdown field and will initialize the values from Global Code Category 'TAXONOMYCODE'

Current Openings: This is a text box field and allows to enter Site record with Current Openings only the integer value are allowed. This field update the site record with the 'As of' date for the current openings

· **As of**: This is a Date Control field

Place of Service: This is a drop down field and will pull the value from Global Code Category 'PCMPLACEOFSERVICE'

License #: This is a text box field and allows to enter the site record with License Number and is alpha numeric field

Below checkbox selection fields will be updating Site record based on the selection of each fields.

- Weekend Hours
- Handicap Access
- DD Population
- Adults
- 1099
- Evening Hours
- SUD Population

- MI Population
- Children

Site Comments: This is a text box field.

Grid section:

Below columns will be displayed in the grid section:

- Days of the Week
- Open
- Close

Author: Renuka Gunasekaran

87. EII# 127549: Implementation of Provider Contracts Templates.

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

Navigation Path 1: My Office - Contracts- New - Contract Details - click on 'New Contracted Rates' icon - 'Contracted Rates Details' screen -'Providers' tab -'Add Providers' button - 'Associated Providers' popup

Navigation Path 2: 'My Office' -'Provider Contracts' -Select Provider hyperlink -> 'Provider' -'Provider Contracts' -'Contract Details'

Functionality 'Before' and 'After' Release:

Purpose:

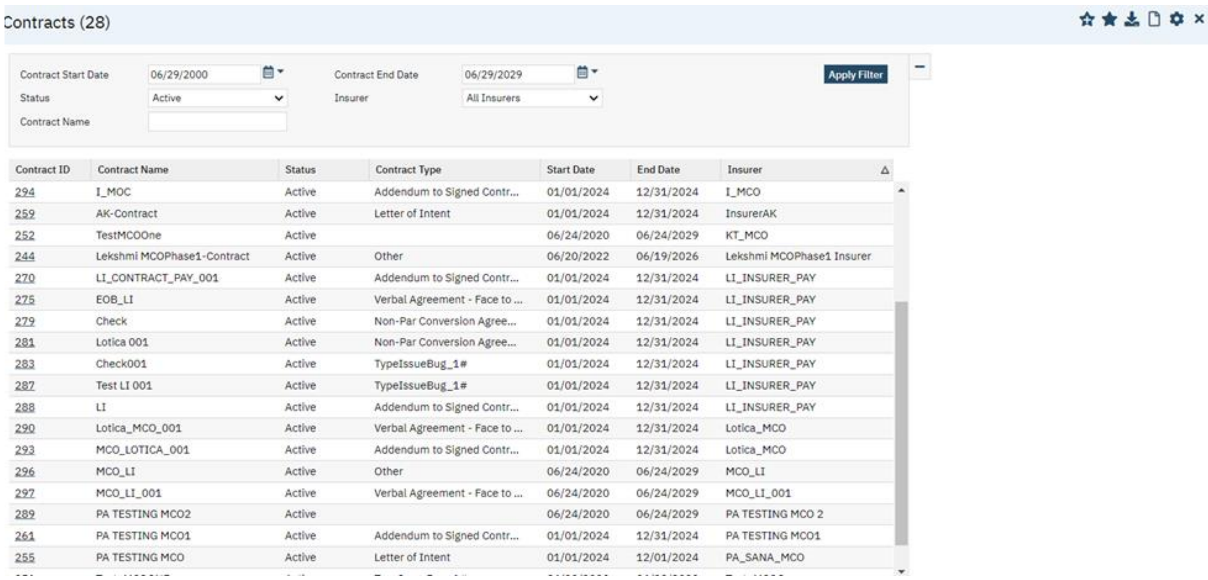
1. Ability to setup a contract once and it is linked to multiple providers in bulk.

2. This screen is used to build contract rates similar to the screen that already exists in Contract Rate Details page. This record is not linked to the provider record hence, we cannot associate it to clients or site records. Otherwise, all functionality will be the same.

3. When reviewing a contract associated in a Provider record, then there will be a checkbox that allows users to know that the contract was created from the master record.

Functionality 'Before' and 'After' release:

With this release, a new 'Contracts Details' screen has been implemented that allows the same contract to be linked to multiple providers. When a contract rate is updated, then the rates can be used by all providers which are linked to the shared/master contract. Based on the Status of the shared contract, it will be used in the claim line adjudication process.


Contracts (28)

Contract Start Date 06/29/2000 Contract End Date 06/29/2029 Apply Filter
Status Active Insurer All Insurers
Contract Name

Contract ID	Contract Name	Status	Contract Type	Start Date	End Date	Insurer
294	I_MOC	Active	Addendum to Signed Contr...	01/01/2024	12/31/2024	I_MCO
259	AK-Contract	Active	Letter of Intent	01/01/2024	12/31/2024	InsurerAK
252	TestMCOOne	Active		06/24/2020	06/24/2029	KT_MCO
244	Lekshmi MCOPhase1-Contract	Active	Other	06/20/2022	06/19/2026	Lekshmi MCOPhase1 Insurer
270	LI_CONTRACT_PAY_001	Active	Addendum to Signed Contr...	01/01/2024	12/31/2024	LI_INSURER_PAY
275	EOB_LI	Active	Verbal Agreement - Face to ...	01/01/2024	12/31/2024	LI_INSURER_PAY
279	Check	Active	Non-Par Conversion Agree...	01/01/2024	12/31/2024	LI_INSURER_PAY
281	Lotica 001	Active	Non-Par Conversion Agree...	01/01/2024	12/31/2024	LI_INSURER_PAY
283	Check001	Active	TypeIssueBug_1#	01/01/2024	12/31/2024	LI_INSURER_PAY
287	Test LI 001	Active	TypeIssueBug_1#	01/01/2024	12/31/2024	LI_INSURER_PAY
288	LI	Active	Addendum to Signed Contr...	01/01/2024	12/31/2024	LI_INSURER_PAY
290	Lotica_MCO_001	Active	Verbal Agreement - Face to ...	01/01/2024	12/31/2024	Lotica_MCO
293	MCO_LOTICA_001	Active	Addendum to Signed Contr...	01/01/2024	12/31/2024	Lotica_MCO
296	MCO_LI	Active	Other	06/24/2020	06/24/2029	MCO_LI
297	MCO_LI_001	Active	Verbal Agreement - Face to ...	06/24/2020	06/24/2029	MCO_LI_001
289	PA TESTING MCO2	Active		06/24/2020	06/24/2029	PA TESTING MCO 2
261	PA TESTING MCO1	Active	Addendum to Signed Contr...	01/01/2024	12/31/2024	PA TESTING MCO1
255	PA TESTING MCO	Active	Letter of Intent	01/01/2024	12/01/2024	PA_SANA_MCO

Below are the screens/Tabs/fields which are implemented for this feature:

Contracts (My Office)

Contracts list page will display the shared contract created from the Contract Details screen. This page will have Filter and Grid sections.

Filter section:

Details displayed in the Filter section:

- **Contract Start Date:** This is a Date Control field to enter Contract Start Date
- **Contract End Date:** This is a Date Control field to enter Contract End Date
- **Status:** This is a dropdown field and will display the 'Active', 'Inactive', 'Pending' values
- **Insurer:** This is a dropdown field and will display the staff permissioned insurers.
- **Contract Name:** This is a text box field to enter the name of the Contract.
- **Apply Filter** Button**:** on click of this, the filtered records are displayed in the below grid section.

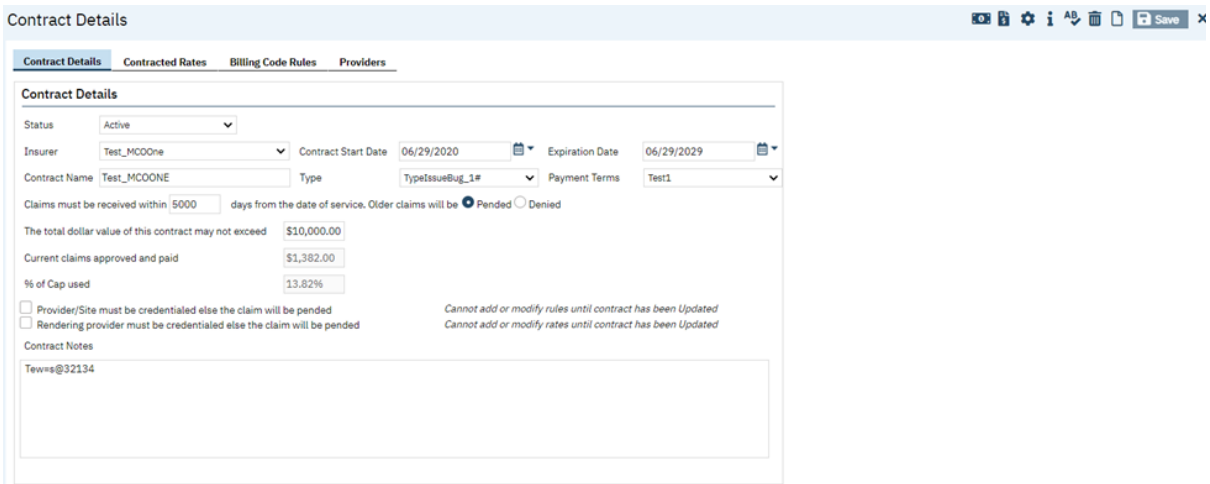
Grid section:

Below mentioned columns will be displayed in the grid section:

- **Contract ID:** This is a hyperlink and will display the created 'Contract ID'. Clicking on the hyperlink will navigate to Contract Details screen
- **Contract Name**: This will display the Contract Name
- **Status:** This will display the status of created contract
- **Contract Type:** This will display the type of the contract
- **Start Date:** This will display the start date of contract
- **End Date:** This will displayed end date of contract
- **Insurer:** This will display the insurer name which is mapped with the contract.

Contract Details screen:

The Contract Details screen has the below options, and the created shared contract will display under the provider contract (provider) screen.



- **Status:** This is a dropdown field and has 'Active', 'Inactive' and 'Pending' options. This is a mandatory field.
- **Insurer:** This is a dropdown field and will display all staff permissioned Insurers. This is a mandatory field.
- **Contract Start Date:** This is a date control field and is used to mention the Start date of the contract.
- **Expiration Date:** This is a date control field and is used to mention the End date of the contract.
- **Contract Name:** This is a text field and is used to mention the contract name. This is a mandatory field.
- **Type:** This is a drop down field and will bind the values from **Global Code Category 'Contract Type'**
- **Payment Terms:** This is a drop down field and will bind the values from **Global Code Category 'ContractPaymentTerms'.**
- **Claims must be received within [X] days from the date of service:** This text box field accepts the numeric value and it is a required field.
- **Older claims will be:** This is a radio button field with 'Pended' and 'Denied' options. By default 'Pended' option will be selected.
- **The total Dollar value of this contract may not exceed:** This is a text field and it accepts the integer value.
  - This field is updated with the dollar value.
  - Note: - This field value will show the same value in all providers mapped to the created Master/Shared contract.

- **Current claims approved and paid:** This is a text field and it will display the value based on the sum of currently paid and approved claims against this contract.

  This value will show the accumulative paid value of all providers mapped to the created Master/Shared contract.

- **% of Cap used:** This is the text field and it will display the percentage value.

  This field is updated with the value based on the mentioned calculation ((Current claims approved and paid / The total dollar value of this contract may not exceed) x 100).

- **Provider / Site must be credentialed else the claim will be pended:** This is a check box and if selected then the Contracted Provider / Provider Group needs to be credentialed or the claim will be pended.

- **Rendering provider must be credentialed else the claim will be pended:** This is a check box field and If this is selected then the Rendering Provider needs to be credentialed or the claim will be pended.
- **Contract Notes:** This is the text field and accepts any Alphanumeric values.

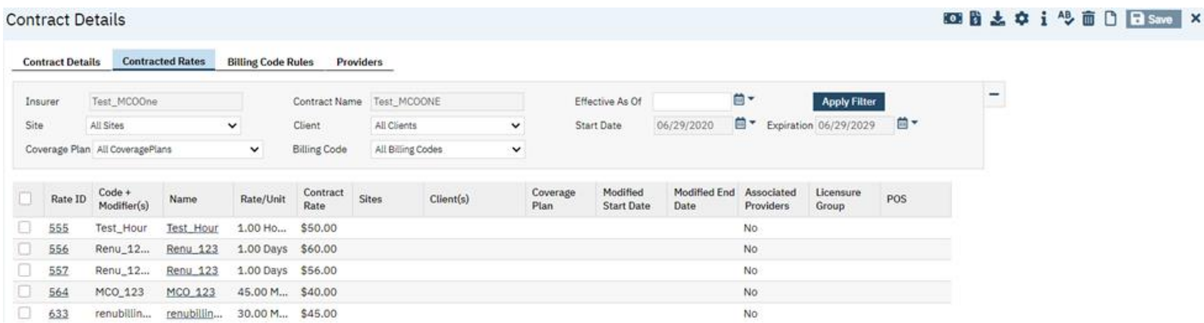
Contract Rates tab:

This tab will display the mapped billing codes to the provider contract. The below is the Path to navigate to Contracted Rates tab:

- **Navigation path:** 'My Office' ->'Provider Contract' ->'Provider' ->Select 'Provider' -> 'Provider Contract' -> 'New' ->Contracts Details' screen ->'Contracted rates' tab.

Contracted Rates List page:

This page will have Filter and Grid sections-



Filter Section

- **Insurer**: Created Contract's Insurer will display in this field.
- **Contract Name:** It will display the contract name.
- **Effective as Of:** This is a date control field and user can enter the Effective Date of a contract.
- **Site:** This is a drop-down field and will display All sites option.
- **Client:** This is a dropdown field and will display All Clients option as master contract does not supports specific to client.
- **Start Date:** This field will display the start date of contract date.
- **Expiration:** This field will display the Expiration date of the contract date.
- **Coverage Plan:** This is a drop down field and will display the list of valid coverage plans.
- **Billing Code:** This is a drop down field and will display the list of Active billing codes.

Grid Section

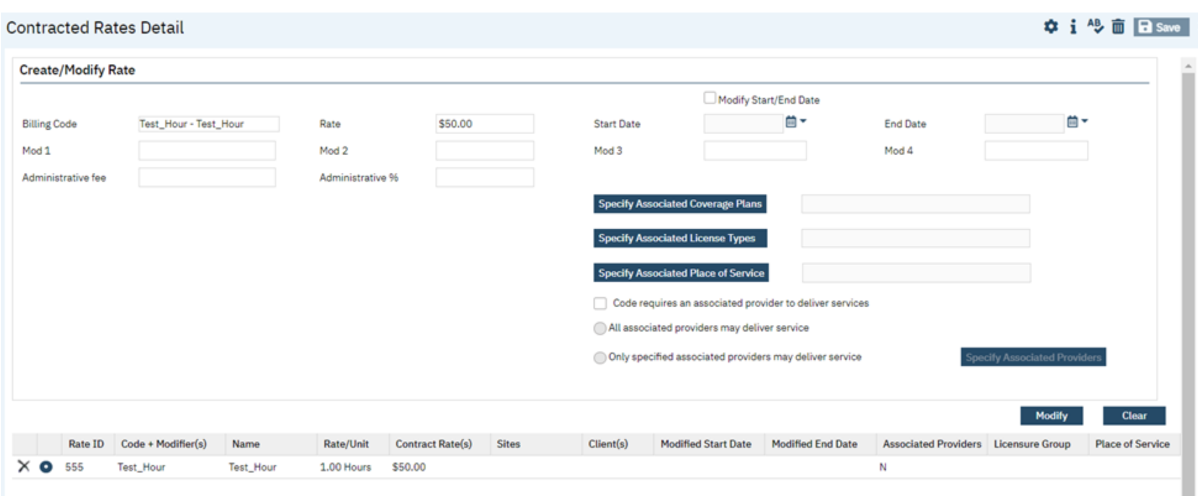
- **Rate ID**: This column will display the id of the mapped contract rate and this is a hyperlinked field. Clicking on the hyperlink will navigate to Contracted Rate Details screen.

- **Code + Modifier(s).** This column will display the mapped billing code modifier if any
- **Name:** This column will display the billing code name with hyperlink, by clicking on it will redirect to the billing codes details screen of the respective contract rate.
- **Rate/Unit:** This column will display the Unit of the mapped Contract rate.
- **Contract Rate:** This column will display the Rate of the mapped Contract rate.
- **Sites:** This column will display the Name of the sites if it is mapped with any Contract rate.
- **Client(s):** This column will display the Name of the client if it is mapped with any Contract rate.
- **Coverage Plan**: This column will display the Name of the coverage plan if it is mapped with any Contract rate.
- **Modified Start Date**: This column will display the Start date of the contract rate.
- **Modified End Date:** This column will display the End date of the contract rate.
- **Associated Providers:** This column will display Yes or No based on the check box selection displayed in contracted rates details screen.
- **Licensure Group:** This column will display the License name if it is mapped with any Contract rate.
- **POS:** This column will display the Place of service name if it is mapped with any Contract rate.

Contracted Rates Detail screen:

By clicking on 'New Contracted rates' screen, it will navigate to the 'Contracted rates detail' screen.

Navigation Path: 'My Office' ->'Provider Contract' ->'Provider' ->Select 'Provider' -> 'Provider Contract' -> 'New' ->Contracts Details' screen ->'Contracted rates' tab -> 'New Contracted rates' icon ->'Contracted Rates Detail' Screen.



Below mentioned the changes of contracted rates details screen for the Master/Shared Contract.

- 'Site' and 'Add Client' buttons are removed from contracted rate details screen of the shared contract.

- Also 'Only specified associated providers may deliver service' option is disabled in Contracted Rates Detail screen.

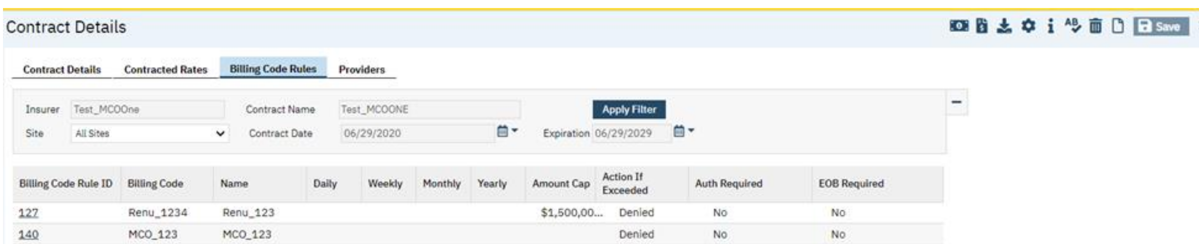
Billing code Rules:

This tab is used to set the rules for the mapped billing code. This has 'Billing Code Rules' Tab and 'Billing code Rules Detail' screen

Billing code Rules Tab:

This is the list page of Billing Code Rules and it has Filter and Grid section:

- **Navigation path:** 'My Office' ->'Provider Contract' ->'Provider' ->Select 'Provider' -> 'Provider Contract' -> 'New' ->Contracts Details' screen ->'Billing Code Rules' tab.



Filter section:

Below mentioned details will be displayed in the filter section:

- **Insurer:** This field will display the insurer which is mapped with the contract.
- **Contract Name:** This field will display Contract name
- **Site:** This is a dropdown field and only 'All Sites' option will be displayed
- **Contract date:** This field will display the start date of the contract
- **Expiration Date:** This filed will display the Expiration date of the contract

Grid Section:

The below mentioned columns will be displayed in the grid section:

- **Billing Code Rule ID:** This column will display the ID of the 'Billing Code Rule' and it will be hyperlinked.

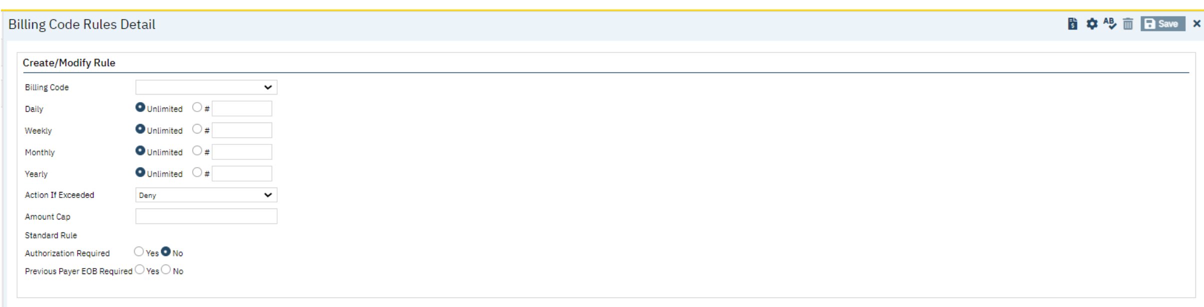
  Clicking on this hyperlink will navigate to Billing Code Rules Detail screen.
- **Billing Code:** This column will display the Billing code
- **Name:** This column will display the billing code name
- **Daily**: This column will display the daily unit limit to use the Billing Code/Contract Rate

- **Weekly**: This column will display the Weekly unit limit to use the Billing Code/Contract Rate
- **Monthly**: This column will display the Monthly unit limit to use the Billing Code/Contract Rate
- **Yearly:** This column will display the Yearly unit limit to use the Billing Code/Contract Rate
- **Amount Cap:** This column will display the Maximum amount to use the Billing Code/Contract Rate
- **Action If Exceeded**: This column will display two options, Pend or Denied.
- **Auth Required:** This column will display Yes or No options. If it is yes, then Authorization is required for the claim creation using the billing code.
- **EOB Required:** This column will display Yes or No options. If it is yes, EOB is required for claim creation using the billing code.

Billing Code Rules Detail:

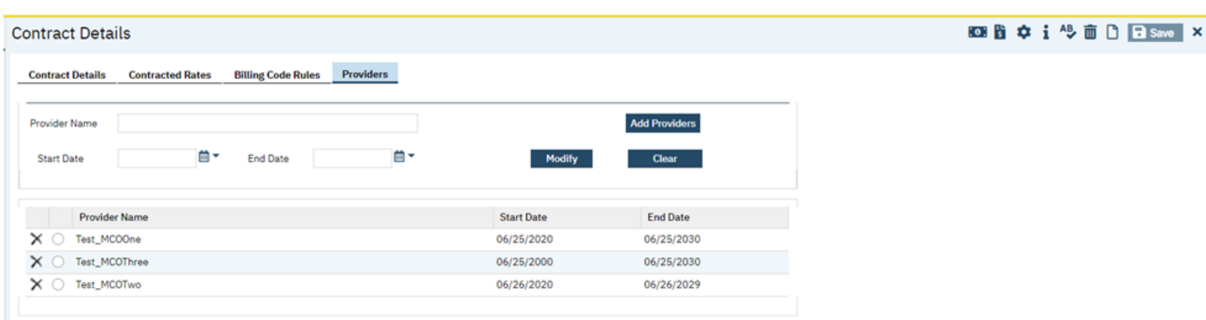
This is the detail screen of Billing code rules and there is no change in the existing screen.

- **Navigation path:** 'My Office' ->'Provider Contract' ->'Provider' ->Select 'Provider' -> 'Provider Contract' -> 'New' ->Contracts Details' screen ->'Billing Code Rules' tab ->'New Billing Code Rule' -> 'Billing Code Rules Detail' screen.



Providers tab:

- This is a newly implemented tab, and providers are mapped in this tab. Providers are mapped by selecting providers from the 'Associated Providers' pop up. Selected providers will get displayed in providers tab once after click on save from Contract Details screen



Below are the fields displayed in 'Providers' tab

- **Provider Name:** This is a typeable search box used to filter on specific Providers to see if they are associated with the master contract.

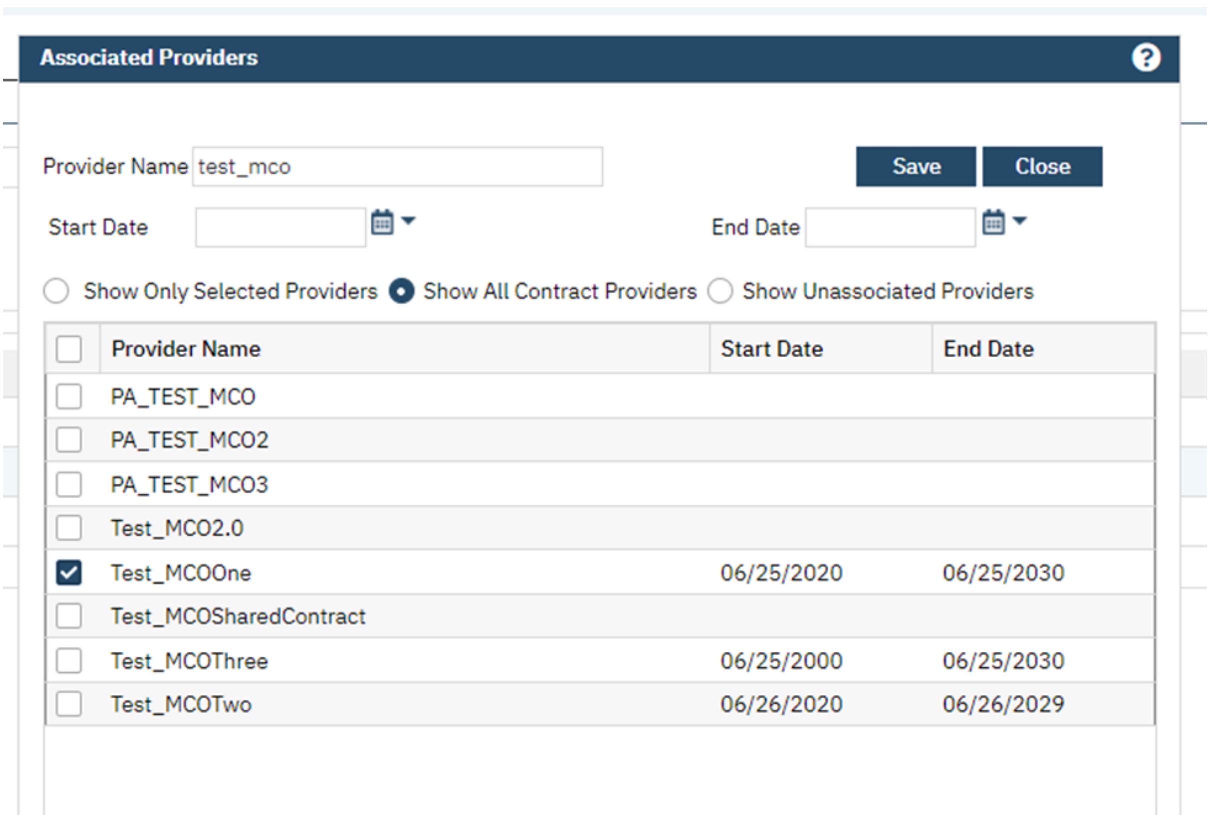
- **Add Providers:** By clicking on this button, 'Associated providers' pop up will open.
- **Start and End date:** These are date control fields and are used to modify the start/end date of the contract that is associated to the selected provider.
- **Modify:** This button is used to commit the modified start and end dates
- **Clear:** This button is used to clear information entered in start date, end date, and provider name fields in case the data was entered incorrectly.

Grid details:

- **Provider Name**: This column will display the name of the provider
- **Start Date:** This column will display the provider contract start date.
- **End Date:** This column will display the provider contract end date.

Associated Providers – Pop Up

By clicking on 'Add providers' option, 'Associated Providers' pop up will get displayed.



- **Provider Name:** This is a type able search text box field used to filter the specific provider.
- **Start date and End date**: These are date control fields and are used to set and view the contract start and

end date of the selected provider.

- **Save:** Clicking on Save button will Save the selected provider with start and end date
- **Close:** Clicking on the Close button will close the Associated Providers popup.

In Associated popup, all permissioned providers will get displayed in grid view.

- Provider Name: This column will display staff permissioned providers except rendering providers.
- Start and End date: These columns will display the Updated Start and End date of the contract.

There are three radio buttons used to filter the providers

- Show Only Selected Providers: By selecting this radio button, it will display only the selected providers.
- Show All Contract Providers: By selecting this radio button, it will display all the staff permissioned providers.
- Show Unassociated Providers : By Selecting this radio button, it will display the unselected/unmapped providers of the current contract**.**

Provider Contract (Provider)

Created shared Contracts will display under the provider contract (Provider) screen with the existing contracts. Below are the changes of Shared/Master and individual contracts:

Changes in Individual Contract

Contract details:

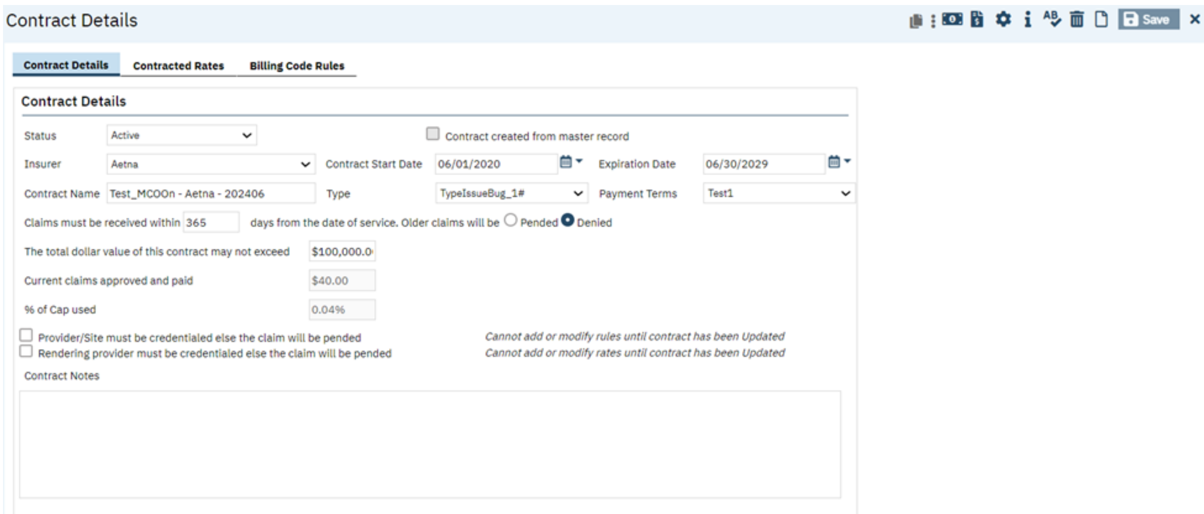
- This is the existing screen but in this tab one new checkbox field has been implemented as 'Contract created from master record' and it will be disabled state.
- For individual contracts, this checkbox will be unchecked.
- All other options in the Contract Details tab remain the same.

Contract Rate Details:

- This is the existing screen and all other options remain the same on 'Contracted Rates' tab and 'Contracted Rates Details' screen.

Billing Code Rules:

- This is the existing screen and All options remain same on 'Billing Code Rules' tab and Billing Code Rules Detail' screen.



<u>Changes in Shared Contract</u>

In the Contract (My Office) screen, Contracts are created and mapped with multiple providers. Those shared/Master contracts will be visible in the respective provider contract(provider) screen.

Contract Details

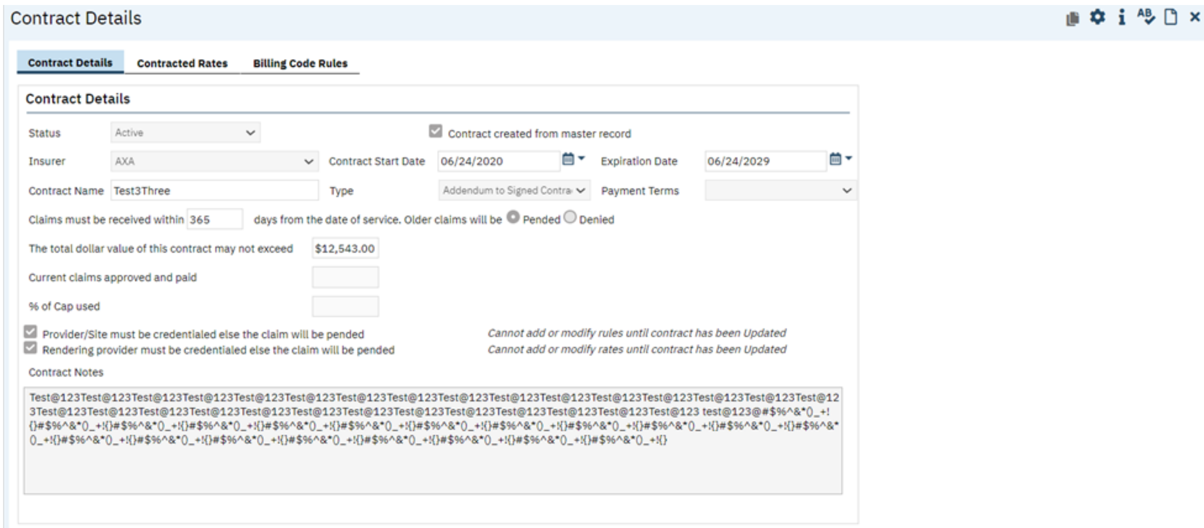
- ‘Contract created from master record’ check box is implemented in contract details tab.
- For Shared/Master contracts, this checkbox is checked and if the checkbox is checked all options in the Contract Details tab will be initialized from Contracts(My Office) ->’Contract Details’ screen.
- All options in this screen are disabled, the users will not be allowed to modify/update data.
- ‘New Contracted Rates’ icon, ‘New Billing Code rules’ icon, ‘Delete’ option and ‘Save’ button are not visible for the shared contract. Only ‘Copy Contract’ is visible and we can be able to copy the shared contract using this option.

Contract Rates:

- Contract rates are pulled from the Shared/Master contract where the providers are mapped.
- ‘Site(s)’ and ‘Add Client’ sections will not be visible in the ‘Contracted rate Detail’ screen as those options are not supported for the shared/master contract.

Billing Code Rules:

- Billing code rules pull from the Shared/Master contract where the provider are mapped.



Data Model Change:

Table: a new table 'ContractProviders' is added.

Altered existing table 'Contracts' table to keep ProviderId field nullable.

Added column 'SharedContract' in Contracts table.

Author: Renuka Gunasekaran

88. Core Bugs # 128480: The provider contract name is incorrectly displayed in the 'Contract Name' filter on the 'Contract Rate Details' tab of the 'Contract Rates Details' screen.

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

Navigation Path: 'My Office' – 'Provider Contract' – 'Provider' – 'Provider Contract' – 'Contract Details' – 'Contract Rates' tab – 'Contract Rates Details' screen – 'Billing Code Rules' tab – 'Contract Rates' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Contract Name' was changed in the 'Contract Name' filter on the 'Contract Rate Details' tab, when any 'Contract Rate' was selected, and then navigated to 'Billing Code Rules' tab and navigated back to the 'Contract Rates' tab.

With this release, the above-mentioned issue has been resolved. Now, the 'Contract Name' remains unchanged in the 'Contract Name' filter of the 'Contract Rate Details' tab of the 'Contract Details' screen, on navigating to any other tabs and navigating back to the 'Contract Rates' tab.

Author: Renuka Gunasekaran

89. EII # 127550: Initializing the diagnoses from claims to service in the 'Service from Claims process'.

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

Pre-requisites: Map procedure code with billing code through the below **path:**

'Administration' – 'Billing codes' – 'Billing code details' – select 'procedure code' from drop-down.

Navigation Path 1: 'Administration' - 'Configuration Key' -' IncludeDiagnosisInServiceFromClaims'

Navigation Path 2: 'Client' search – Select a 'Client' – Navigate to 'Claims (My Office)' screen – Select a Claim type 'P/I/PP/PI' – 'Claim Entry' Screen – Select 'Provider', 'Insurer' -> Add 'Diagnosis' – Add Service line – 'Insert' – 'Save'.

Navigation Path 3: 'My Office' – 'Claim Lines' – Select a 'Claim' – 'Claim Details' screen – 'Select Action' – 'Adjudicate' and 'Pay'.

Navigation Path 4: 'My Office' – 'Service from Claims' – Select the recently paid claim line checkbox – 'Create Service' option – click on 'Service ID' – 'Service Detail' screen — 'Billing Diagnosis' tab.

Functionality 'Before' and 'After' release:

Purpose: Initialization of diagnosis from 'Claim to Service' in the 'Services from Claim' process.

With this release, the diagnosis are initialized from claims to service when the 'IncludeDiagnosisInServiceFromClaims' configuration key is enabled in the 'Service from Claim' process.

Set up:

- 'Diagnosis' is initialized from 'claims to service' in the 'Service from Claims process', when the 'IncludeDiagnosisInServiceFromClaims' system configuration key is set as 'Yes'.
- 'Diagnosis' is not initialized from claims to service in the 'Service from Claims process', when the 'IncludeDiagnosisInServiceFromClaims' system configuration key is set as 'No'.
- The default value of the configuration key is 'No'.

System Configuration Key Details:

Key Name: IncludeDiagnosisInServiceFromClaims

Read Key as: Include Diagnosis In Service From Claims.

Allowed Values: Yes, No

Default Value: No

Modules: SCM MCO

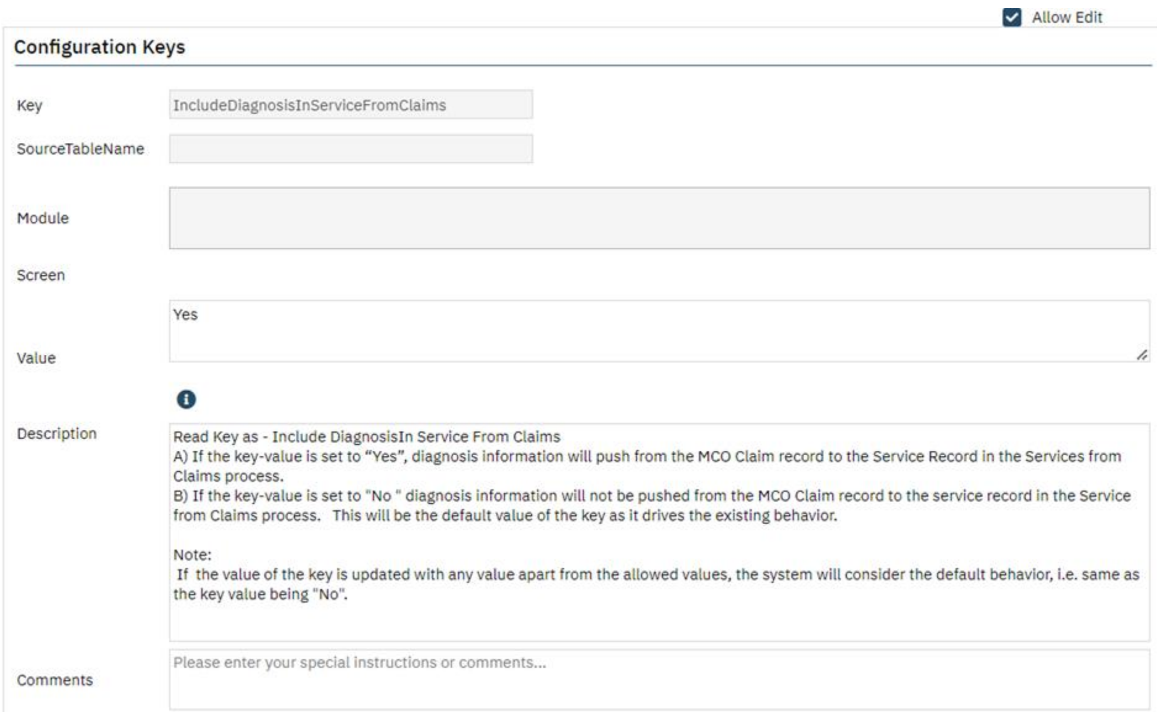
Description:

A) If the key-value is set to "Yes", diagnosis information will push from the MCO Claim record to the Service Record in the Services from Claims process.

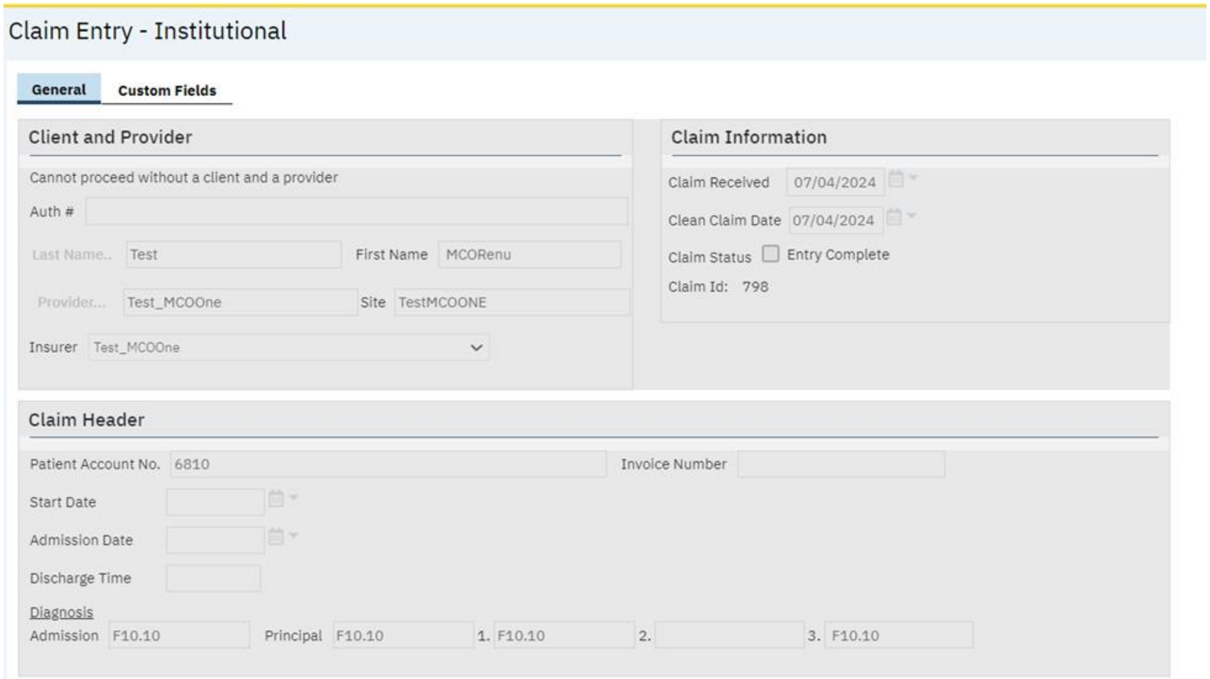
B) If the key-value is set to "No" diagnosis information will not be pushed from the MCO Claim record to the service record in the Service from Claims process. **This will be the default value of the key as it drives the existing behavior.**

Note:

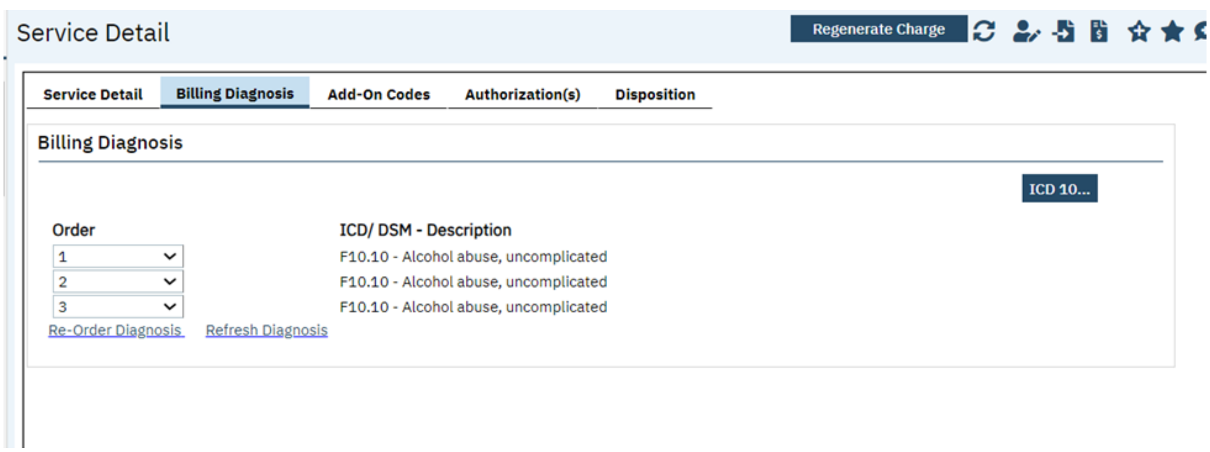
If the value of the key is updated with any value apart from the allowed values, the system will consider the default behavior, i.e. same as the key value being "No".



'Claim Entry' Institutional' screen



'Billing Diagnosis' tab in the 'Service Details' screen



Messages

Reference No	Task No	Description
90	Core Bugs # 128676	'Message Detail': The "Display As" name is not displaying for the 'To' dropdown search.

Author: Ramya Nagaraj

90. Core Bugs # 128676: 'Message Detail': The "Display As" name is not displaying for the 'To' dropdown search.

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

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

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Message Detail' screen, the "Display As" name was not displayed for the 'To' dropdown search.

With this release, the above-mentioned issue has been resolved. Now, the "Display As" name is displayed along with 'LastName' and 'FirstName' for the 'To' dropdown search, in the 'Message Detail' screen.

Methadone

Reference No	Task No	Description
91	EII # 124896	Implemented a MAT Holds List and MAT Holds detail page for adding manual hold and releasing both auto and manual hold.

Author: Madhu Basavaraju

91. EII # 124896: Implemented a MAT Holds List and MAT Holds detail page for adding manual hold and releasing both auto and manual hold.

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

Prerequisites: Staff is permissioned with 'MAT Hold List' and 'MAT Holds Details' screens by following the below **Navigation Paths:**

1. Admin – 'Staff/Users' – Staff details – 'Roles/Permissions' tab – 'Permissions' section - Screens 'Permission Type'– Parent 'My Office'– Grant 'MAT Holds List' Permission Item.

2.Admin' – 'Staff/Users' – Staff details – 'Roles/Permissions' tab – 'Permissions' section - Screens 'Permission Type'– Parent 'Client'– Grant 'MAT Holds Details' Permission Item.

Navigation Path 1: Administration – 'MAT Configuration' – 'General' tab – 'Hold' section – 'Set Consecutive Missed Days For Auto Hold' – Save.

Navigation Path 2: My Office – MAT Holds List – New – Client Search and Select - MAT Holds Details – Enter required fields – Insert – Save.

Navigation Path 3: 'Administration' - 'Orders' - 'Orders' list page - New - 'Order Details' screen - Select 'Medication' Order Type - Enter the required fields - Select radio button for the (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes under 'Medication Assisted Treatment' section - Save.

Navigation Path 4: My Office – 'Medication/Lot/Bottle' list page – New - 'Medication/Lot/Bottle Details' screen - Enter the required fields – Save.

Navigation Path 5: My Office – 'MAT Dispenser' list page – New - 'MAT Dispenser Detail' screen – 'General' tab - Enter the required fields – Save.

Navigation Path 6: 'Client' - 'Client Orders' list page - New - 'Client Order details' screen - Select the Order created in Navigation Path 3 - Enter the required fields – Insert – Click on 'MAT Client Level Setup icon– Select days for Face to Face **–** Sign - Save and sign.

Navigation Path 7: 'My Office' – 'MAT Management' list page –click on Connect User icon – Enter required fields - Click on 'Dispense' icon for the respective 'Client' Medication to be dispensed – 'MAT Management Details' screen.

Navigation Path 8: 'Client' – 'Client Flags' list page – Click on 'Hold' hyperlink under 'Note' column for 'MAT Hold' Flag Type – 'Client Flag Details' screen.

Functionality 'Before' and 'After' release:

Purpose:

1. Ability to place a manual hold or a configurable auto hold when a patient misses 'n' number of consecutive days as 'No Show'.

2. A new hold icon for the MAT management list page for adding or releasing a hold.

3. A flag indicating that a client is on hold.

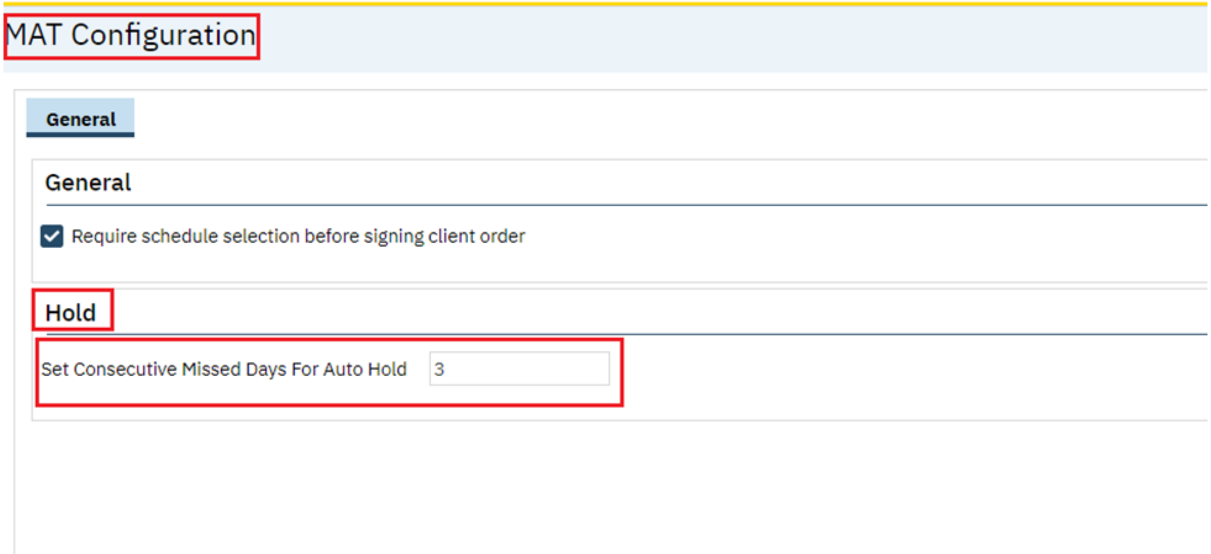
4. Separating the hold feature from Schedule/Take Home.

With this release, a MAT Holds List and MAT Holds detail page are implemented with the following functionalities.

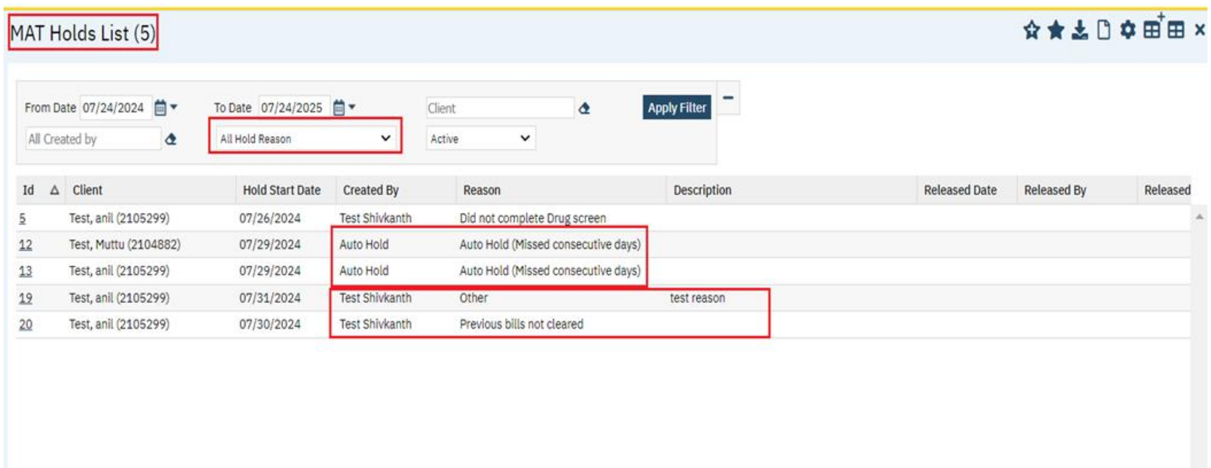
1. MAT Configuration: A new 'Hold' section has been added.

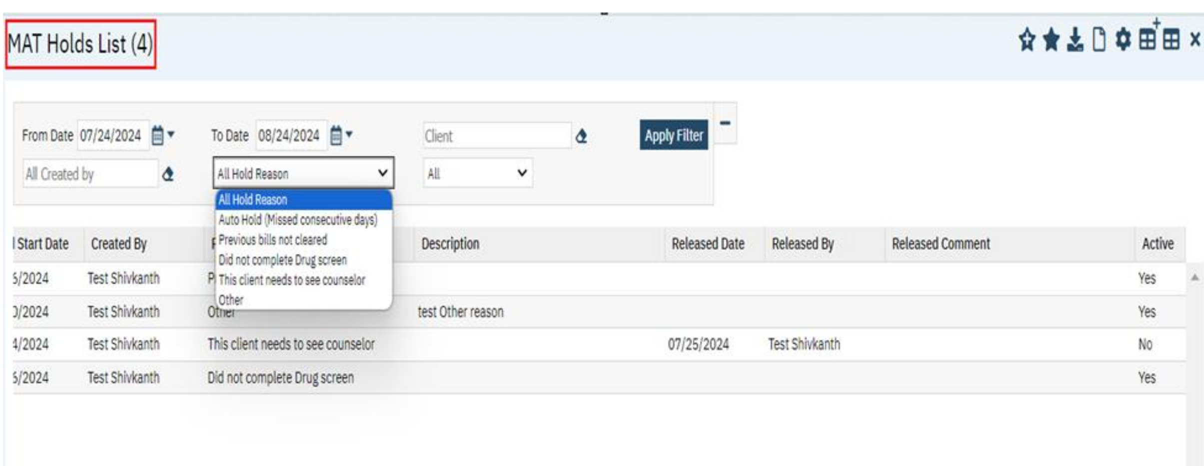
a. **'Hold' section:** 'Set Consecutive Missed Days for Auto Hold' numeric textbox has been added and it is a required field with '3' as Default value.

Note: If this field remains blank or 0, then the system should not generate the auto hold at all for missed days.



2. MAT Holds List (My Office)





The Filter section consists of below mentioned fields.

i. **'From Date and To Date':** This is a calendar control, and the date should be displayed in the format MM/DD/YYYY and default to one month.

- If the From Date and To Date are selected on the same date, then it should pull the record for that day only.

ii. 'All'**:** This is a drop down field. 'All', 'Active' and 'Inactive' values to be displayed.

- By default, Active will be selected.
- When Active is selected, it should display only Active records.
- When All is selected, it should display both Active and Inactive records.
- When Inactive is selected, it should display only Inactive records.

iii. '**Client':** This is a Typeable search Textbox, allows to search All active Clients.

- By default, All will be selected.
- The Client Name should be in this format <L name, F name>(<ID>).
- It populates all the active clients.
- The user can search the Client Name in the format of <L name>, <F name> or <ID>

iv.' CreatedBy':This is a Typeable search Textbox and Allows to search All active Staffs.

- By default, All will be selected.
- It will populate all the active Staffs.
- User can search the Client Name in the format of <L name> or <F name>

v. **'All Hold Reason':** This is a drop down, the values are displayed from the existing Global code (MATCLIENTHOLDREASON). By default, 'All Hold Reason' will be selected.

Grid Columns:

i. Id' : This is a hyperlink when click on the hyperlink it is navigated to the Hold Setup Detail screen. It displays the Hold ID.

ii. 'Client': Display the Client Name in the format <Lname, Fname>(<ID>)

iii. 'Hold Start Date': Display the Start Date of the Hold.

- **Auto Hold:** The date when the system will put the client on hold after 'n' consecutive 'No show'.
- **Manual Hold:** The date when staff put the client on hold for some reason.

  Ex: TB test, needs to see counselor, billing not clear, etc.

iv. 'Created By': Display the staff Name in the format <Lname, Fname> who has created the hold.

- **Auto Hold:** This should be captured as '<Job Name>'.
- **Manual Hold:** Display the staff name that is entered in the Hold Setup Details screen while creating a hold.

v. 'Reason': Display the Hold Reason.

- Auto Hold: The hold reason should be 'Auto Hold (Missed consecutive days)'.
- Manual Hold: The reason captured in Hold Setup Details screen.

- By default, All will be selected.

vi. Description: Display if any remark is captured in the Detail screen.

vii. Released Date: Display the Released Date of the Hold.

- Auto Hold & Manual Hold: The day on which staff take the client off hold.

viii. Released By: Display the staff Name in the format <Lname, Fname> who has released the hold.

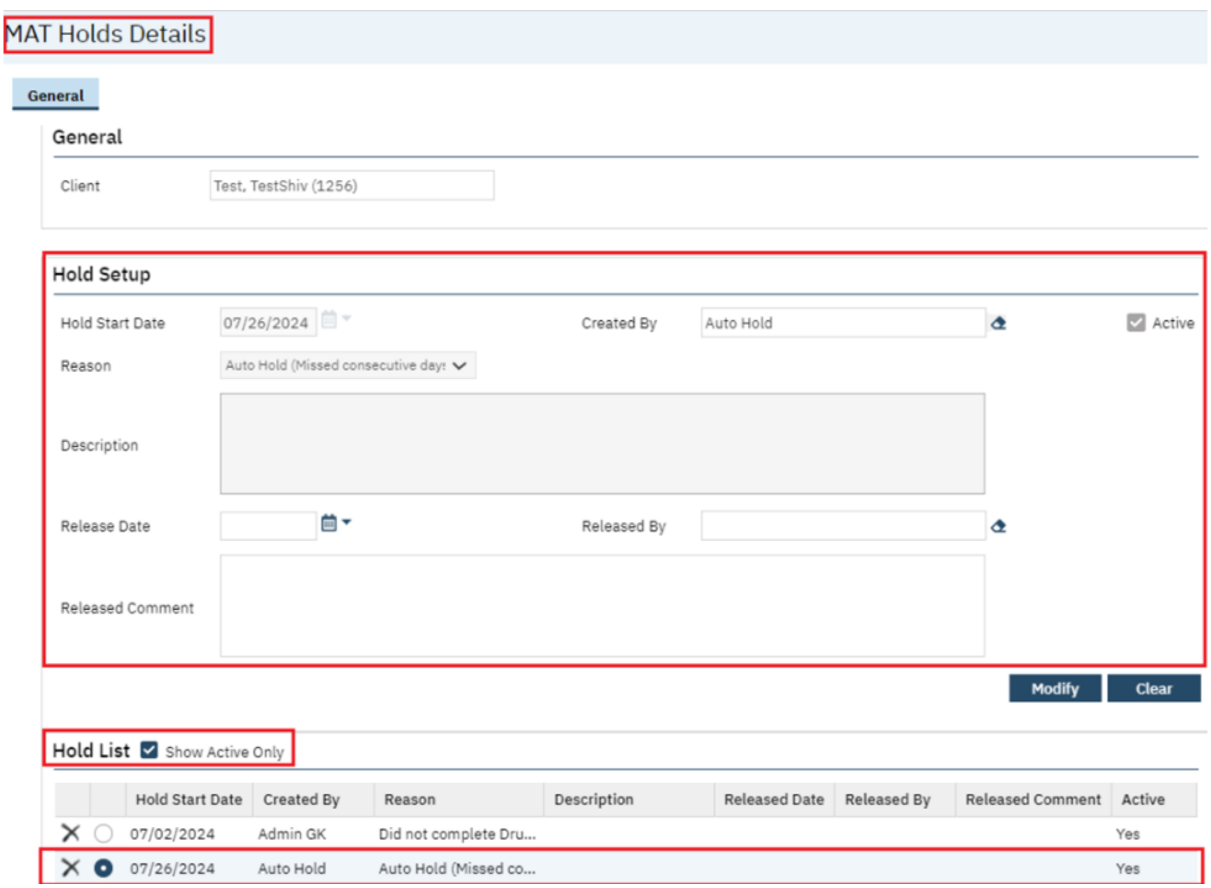
- Auto Hold & Manual Hold: Display the staff name that was captured in Hold Setup Details screen while releasing a hold.

ix. Release Comment: Display if any comment is captured in the Detail screen.

x. Active: Display the Active/Inactive status of the Hold. If 'Active' then display 'Yes' else display 'No'.

3. MAT Hold Details:

Under the 'General' tab, the below mentioned Sections and Fields are displayed.



a. In 'General' section,

i. 'Client': This Textbox is a Non-editable required field, and values are Auto Populated from client search.

- The Client Name should be in this format <Lname, Fname> (<ID>).
- If this screen is opened from the 'MAT Management List' page icon, then auto populate the Client name from that list page.
- If this screen is opened from 'MAT Management Details' page icon, then auto populate the Client name from that list page.

b. In 'Hold Setup' section,

i. 'Hold Start Date': This is a Calendar control, and it is a required field to be selected which will be the Start date of the Hold and to be displayed in the format MM/DD/YYYY.

Auto Hold: The date when the system will put the client on hold after 'n' consecutive 'No show' and disabled.

Manual Hold: The date when staff put the client on hold for some reason.

ii. 'Created By' : This is a typeable search Textbox and required field for Manual Hold, which allow to search All active Staffs.

- Manual Hold: The 'logged in Staff' should be selected by default.
- This field is editable, User should be able to change the default value.
- It should populate all the active Staffs.
- Users can search the Staff Name in the format of <Lname> or <Fname>.
- Auto Hold: This should be auto populated as <Job Name> by default and disabled.

iii. 'Active': This is a Checkbox, the 'Active' checkbox should be selected by default.

- Staff can also save records without selecting this and modify them from inactive to active in future.
- If the 'Active' checkbox is not ticked, then this hold record should be considered inactive.
- The hold status should automatically change to inactive whenever the hold is released.
- This checkbox should be checked and disabled for Auto Holds.

iv. 'Reason': This is a drop down and required field and the values are displayed from the **Existing** Global code (MATCLIENTHOLDREASON).

- Auto Hold: The hold reason should be captured as Auto Hold (Missed consecutive days) by default and disabled.
- Manual Hold: The global code dropdown should be used to select the reason.

v. Description: This is a text area and required field, when Hold Reason is selected as 'Other'.

- Auto Hold: These fields should be disabled.

vi. 'Released Date': This is a Calendar Control: Released date to be selected of the Hold.

- This is to be in the format MM/DD/YYYY.
- The Released Date should not come earlier than the Hold Created Date.

vii. 'Released By': This is a Typeable search Textbox, The 'logged in staff' should be selected by default only when a release date is entered.

- This field is editable, and User should be able to change the default value.
- It should populate all the active Staffs.
- User can search the Staff Name in the format of <Lname> or <Fname>.

viii. 'Release Comment': This is a Text Area field.

ix. 'Insert' Button: Inserts a row in the grid.

x. 'Clear' Button: Clear the entered data.

c. In the 'Hold List' section, for the grid,

i. **'Show Active Only':** This is a Checkbox, and it is selected by default.

If the 'Show Active Only' checkbox is selected, then all the active hold records for that client should be displayed in the grid. Else, both active and inactive hold records for that client should be displayed in the grid.

When a hold is released, the hold status is automatically change to inactive. The hold record is either display or hide in the grid based on the 'Show Active Only' checkbox selection.

ii. **'Delete' button:** Delete the record in the grid.

If records have already been saved, a confirmation message is displayed before deleting them.

iii. **'Hold Start Date':** This column displays the Start Date of the Hold entered in the Hold Setup section.

iv. **'Created By':** This column displays the Staff name of the Hold entered in the Hold Setup section.

v. **'Reason':** This Column Displays the 'Reason' selected, for the Hold entered in the Hold Setup section.

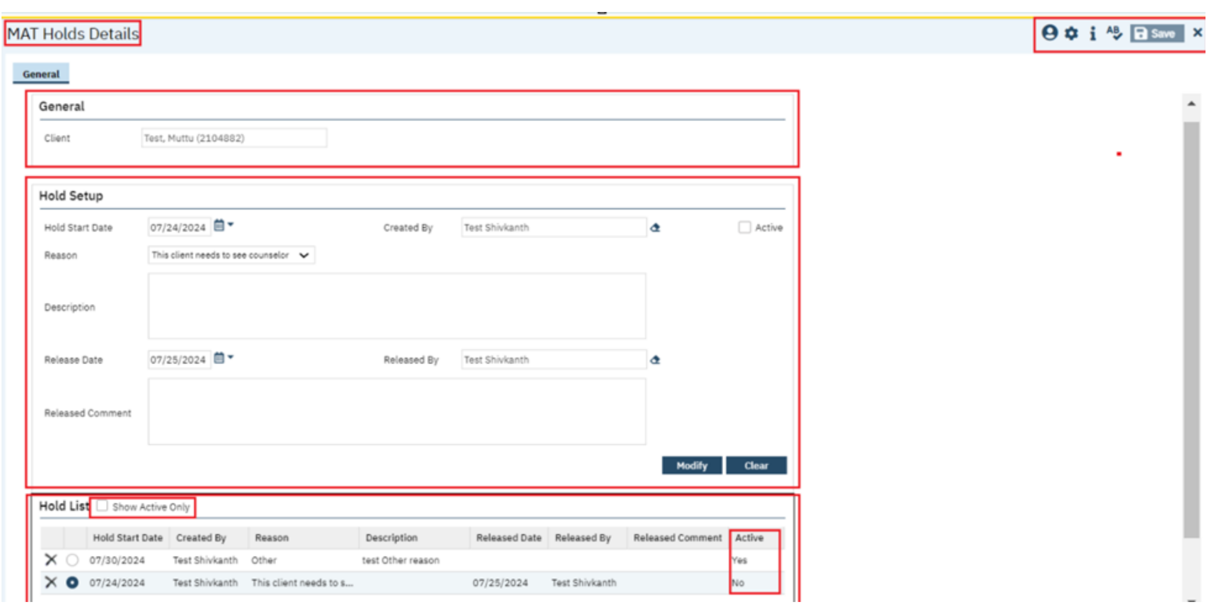
vi. **'Description':** This column displays the 'comment' for the Hold entered in the Hold Setup section.

Vii. **'Released Date':** This column displays the Release Date of the Hold entered in the Hold Setup section.

viii. **'Released By':** This Column Displays the Staff name for the Hold Release entered in the Hold Setup section.

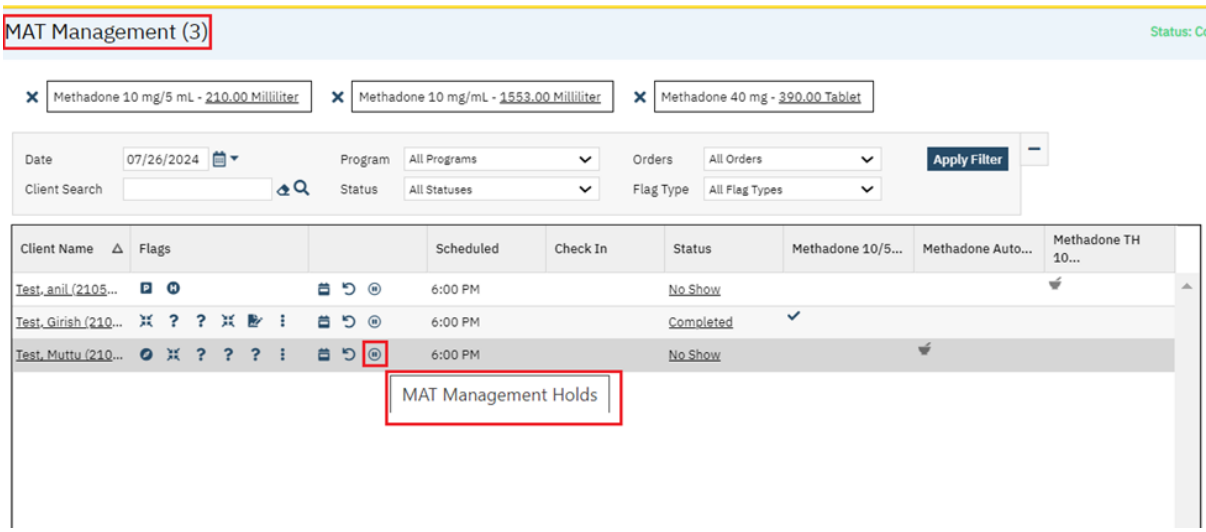
ix. **'Release Comment':** This column displays the 'comment' for the Hold Release entered in the Hold Setup section.

x. **'Active': This column** Displays 'Yes/No' based on the Hold Status.

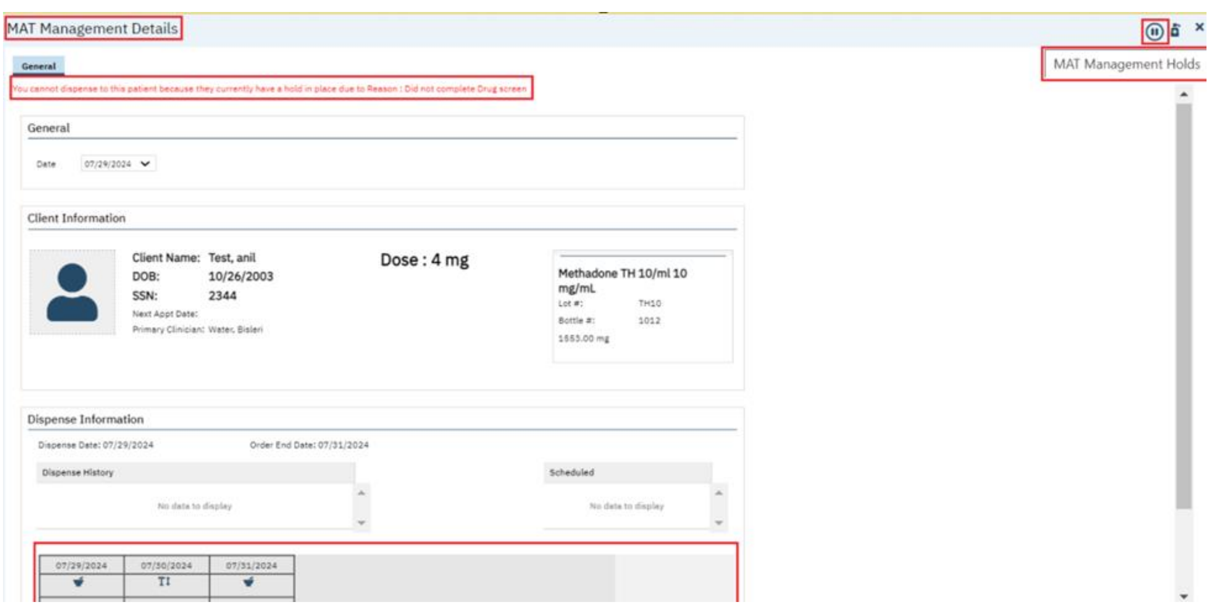


4. 'MAT Management Holds' Icon:

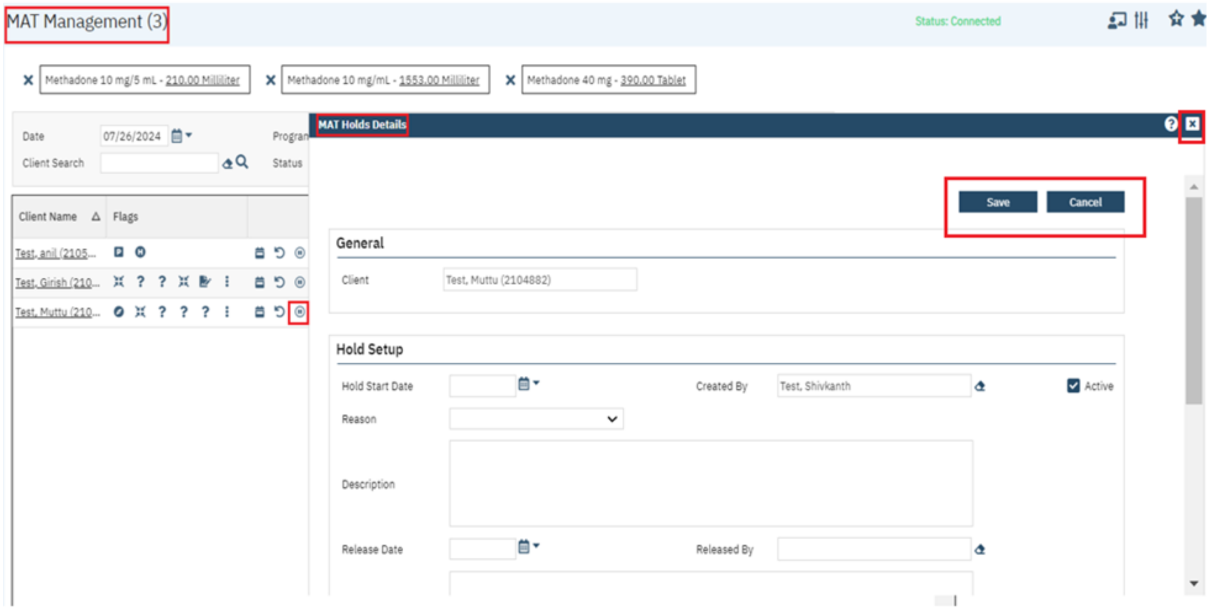
a. In MAT Management List Page, the MAT Management Holds icon will be displayed to every Client under the Icon column in the grid.



b. In 'MAT Management Details' Screen, the MAT Management Holds icon will be displayed in the toolbar.



i. By clicking this icon, 'MAT Holds Details' page pop-up will be displayed.



i. Users are allowed to add Manual hold or Release both an Auto hold and a Manual hold for that particular client using this popup.

ii. This screen consists of all the fields same as ‘MAT Holds Details’ which also includes below mentioned Buttons.

- ‘Save’ Button: By clicking,’ Save’ the entered data.
- ‘Cancel’ Button: By clicking, cancel the entered data without saving it. ‘Close’ Button: By clicking, close the MAT Holds Details pop-up.

iv. After adding or releasing a hold by using this pop-up, the data is updated in the ‘MAT Holds Details’.

v. For Auto Hold, disable the Hold Start Date, Created By, Active, Reason, and Description fields. Therefore, the user should not alter the data that the system generates.

vi. Link for the icon: https://fontawesome.com/v5/icons/pause-circle?f=classic&s=regular.

5. In MAT Management Details screen:

a. When the Client has active Holds, ‘Dispensing grid’ is disabled, Sign/Verbally Agreed and Print Label is hidden and Validation message to be displayed as: You cannot dispense to this patient because they currently have a hold in place due to Reason: <reason1, reason2>

- If there are multiple holds, then all the reasons will be displayed with comma separator in the validation message.

Example: You cannot dispense to this patient because they currently have a hold in place due to Reason: <Previous bills not cleared, Auto Hold (Missed consecutive days)>

- If the hold reasons are longer, then ellipsis (...) has been added and on hover it will list all the hold reasons.

b. ‘Bypass Hold for Dispense' icon: It will be displayed in the toolbar of 'MAT Management Details' Screen.

i. On clicking this icon, the 'Bypass Hold For Dispense' pop-up will be opened and the user can add the reason and comment and acknowledge for dispensing.

ii. This popup will bypass all the active holds for the respective client and allow the user to dispense the medication. Still the validation message will be displayed in the 'MAT Management Details' screen.

iii. The validation message appears and just the dispense section will be activated while doing the bypass.

c. 'Bypass Hold For Dispense' popup:

In 'Bypass Hold For Dispense' popup, the below mentioned fields will be displayed:

i. <Message>Label: When the respective Client has active Holds, A warning message will be shown: "The client is on hold. Do you want to bypass the hold and allow the medication to be dispensed?"

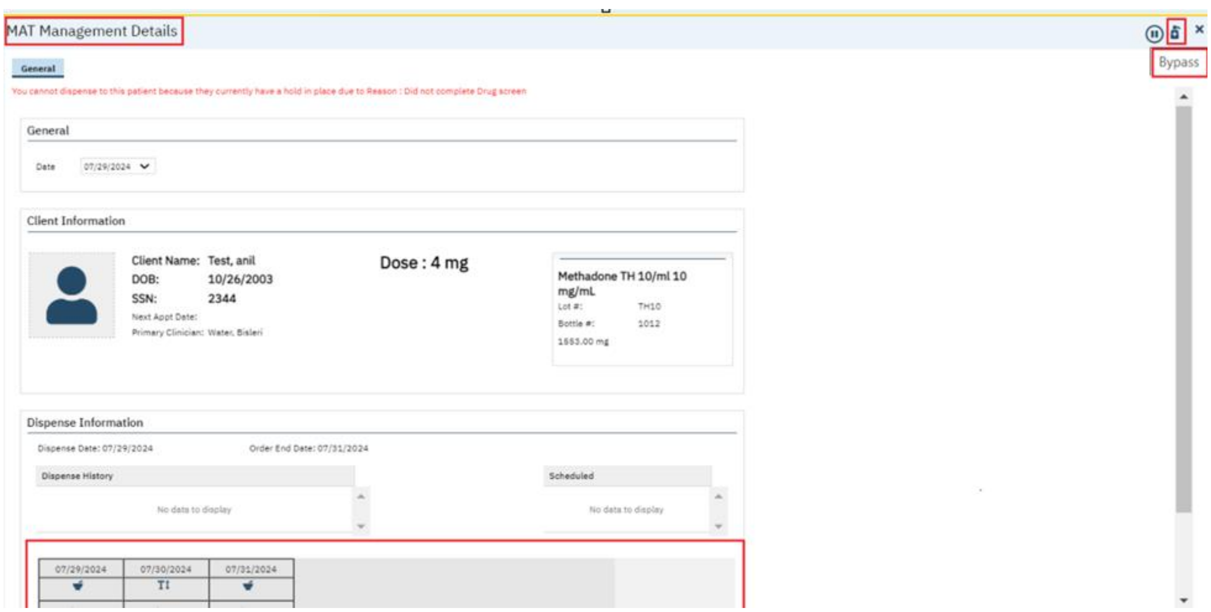
ii. 'Comment' Text area: It is a required field, to dispense medication and bypass all active holds else, 'Please enter comment' validation to be displayed.

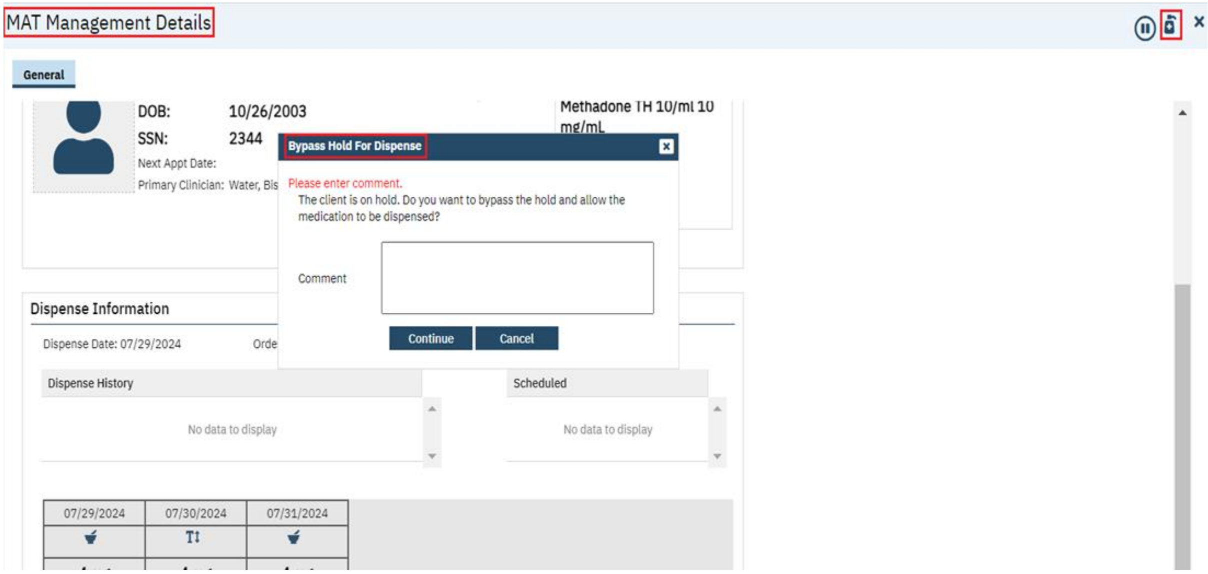
iii. 'Continue' Button: By clicking on 'Continue', the user will acknowledge and dispense the medication for the client on hold.

iv. 'Cancel' Button: By clicking on 'Cancel', it will take you back to the 'MAT Management Details'.

- If they cancel and don't perform any action, when users click on this same icon, this popup will appear once more.

v. 'Close' Button: By clicking on 'Close', it will close the 'Bypass Hold For Dispense pop-up'.





6. 'MAT Hold'– Flag Icon Link: https://fontawesome.com/icons/h?f=classic&s=solid.

a. When the Client has active Holds, this flag will be displayed in the following screens:

- Client Flags List Page (Client)
- Client Flags List Page (My Office)
- Client Tab Flags
- MAT Management List Page
- Reception

i. MAT Hold flag is created along with auto hold creation.

ii. For a manual hold, while saving the data a flag is created.

- If any active hold flag for that client is already available, then only the hold reason will append in flag.

iii. On hovering on the Flag,

Flag Type :< Manual Hold (reason 1, reason 2), Auto Hold (Missed consecutive days)> to be displayed.

iv. If there are multiple active holds present for a client, it will be displayed with a comma separator.

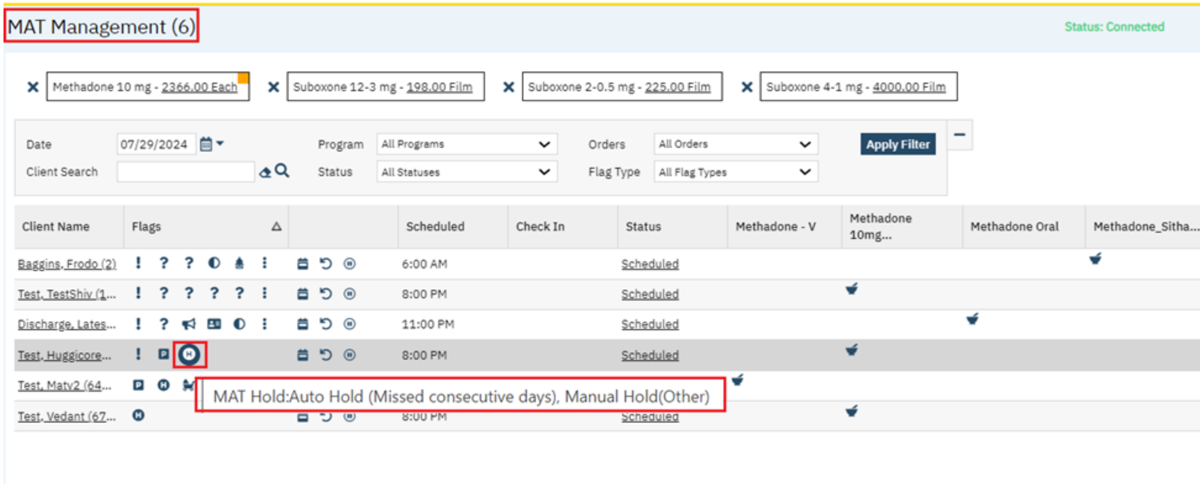
Ex: If a client is on hold after 3 consecutive 'No shows', then the system will put the client on auto-hold.

Also, if billing is not clear for the same client, staff will put the client on manual hold.

In this scenario, it will show both<Manual Hold (Previous bills not cleared), Auto Hold (Missed consecutive days)> while hovering over the flag.

v. The job will automatically create the flag again if the flag is manually ended for a single hold when it is being released, but the client still has other holds that are in active.

vi. The flag's start and end dates should be captured, and the hold reasons must be displayed based on these dates.



b. ‘MAT Hold’ Flag details:

i. Type: MAT Hold

ii. Level:Information

iii. Open Date: Auto Hold: The date when the system will put the client on hold after <'n'> of consecutive 'No show'.

- Manual Hold: The date when staff put the client on hold for some reason.

iv. Display Date: Same as Open Date.

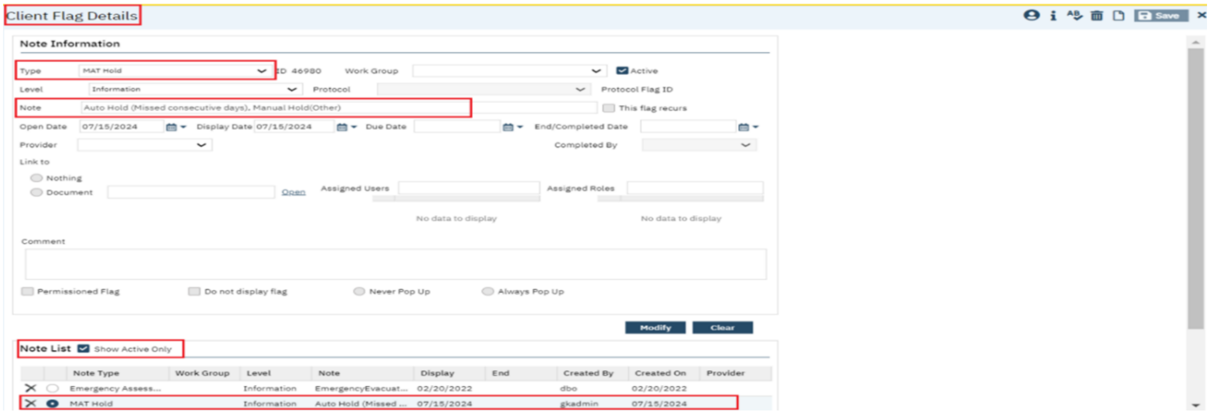
v. End Date: Auto Hold & Manual Hold: The day the client has been released from all active holds by the staff.

- Once all the active holds have been completely addressed and released then the flag should be removed.
- Flag can be manually ended as well.

vi. Due Date: No due date, as the flag should always be displayed until the client is on hold.

vii. Assigned To: Manual Hold: This will be taken from the Hold Details 'Created By' field.

- Auto Hold: Assigned To should be blank.

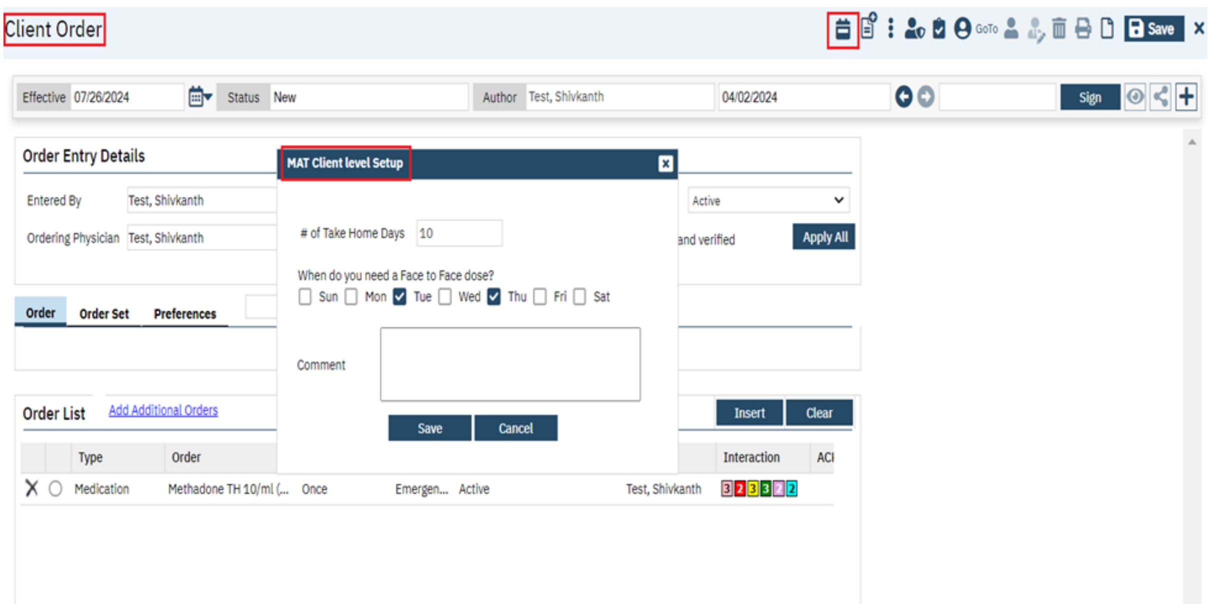


7. 'MAT Client Level Setup popup' field changes in Client Order details and MAT Management list screen:

a. The listed fields have been removed.

- Put the Client on hold? (Yes, No, N/A)
- Hold Reason

b. Validation 'Please Enter Comments' when 'Other' is selected as the hold reason has been removed.



Data Model Changes:

1. For Bypass – (HoldForDispenseBypassedBy, HoldForDispenseBypassDate and HoldForDispenseBypassComment) columns are newly added to the 'MAT Management Details' table.

2. For Auto Hold - a table MatmanagementClientHolds is created.

My Calendar

Reference No	Task No	Description
92	EII # 127881	Ability to display Service entries in different colors on My Calendar screen.

Author: Niroop Hassan

92. EII # 127881: Ability to display Service entries in different colors on My Calendar screen.

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

Navigation Path 1: 'Administration' – 'Procedure/Rates' - 'Procedure/Rates' list page – Click on required Procedure name hyperlink – 'Procedure Code Details' page – Select the required color in the 'Assigned Color' section and click on 'Save' icon.

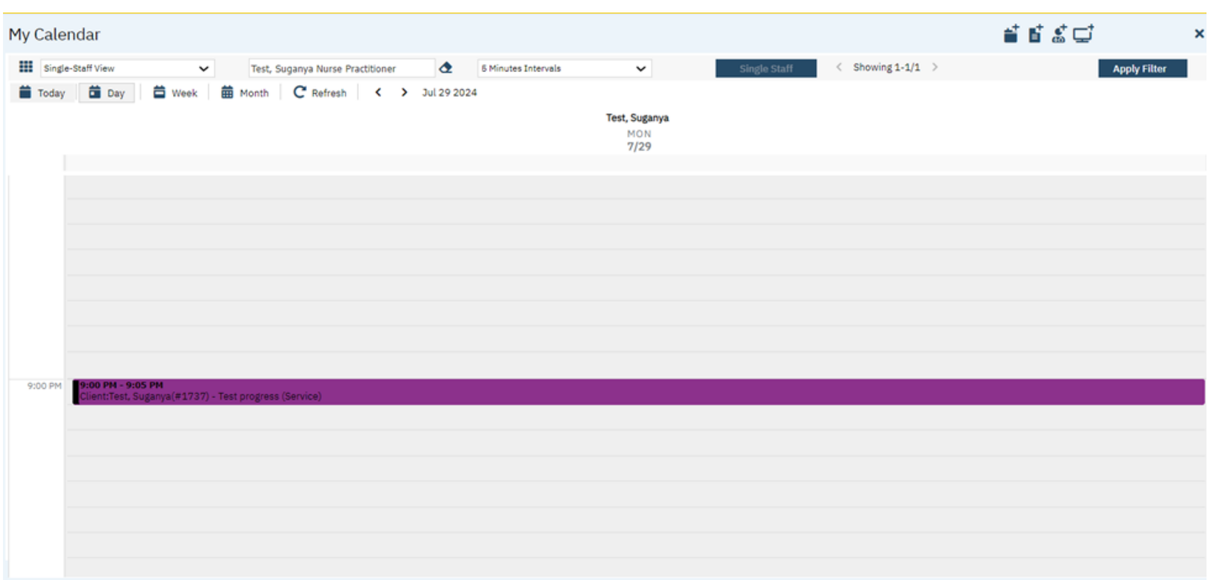
Navigation Path 2: 'Client' – 'Services' – 'Services' list page – Click on the 'New' icon – 'Service Details' page - Select the required data and above Procedure and click on the 'Save' icon.

Navigation Path 3: 'Client' – 'Services/Notes' – 'Services/Notes' list page – Click on the 'New' icon – 'Service Note' page – Select the required data and above Procedure and click on the 'Save' icon.

Functionality 'Before' and 'After' Release:

Purpose: Currently, there is only one assigned color for Services entries on My Calendar which is set from the global code category "Appointment Type" for Services. With this implementation, the Reception Staff can identify appointments for Services at a quick glance.

With this Release, the Service entries with a Procedure Code that has a color setup, will be displayed in that specified color on the 'My Calendar' screen.



Note:

A global code category is used to setup the Color for services (this is one color for all Services). But when the Procedure code setup is available, then this setup will take precedence and the Service entry color will be displayed accordingly in My Calendar. If there is no setup at the Procedure Code level, then previously existing functionality will be retained i.e., displaying the color from the global code category "AppointmentType" for Services.

My Reports

Reference No	Task No	Description
93	Core Bugs # 128657	Signature on Incident Report glitch.
94	Core Bugs # 127614	Issue in Client Statement Address Format.
95	EII # 127140	Updating 'CURRENT MEDICATIONS' section with two new columns in the 'FaceSheet' Report.

Author: Rakesh Gangadhar

93. Core Bugs # 128657: Signature on Incident Report glitch.

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

Navigation Path: Client – Go Search –'Core Incident Report' – Enter the details – Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The signature pop-up on the Incident Report (when signing in the Details section) was displayed as "[Author] is signing the" instead of "[Author] is signing the Diagnosis Document".

With this release, the above-mentioned issue has been resolved. Now, the signature pop-up on the Incident Report (when signing in the Details section) is displaying as "[Author] is signing the Diagnosis Document".

Author: Saravana Kumar

94. Core Bugs # 127614: Issue in Client Statement Address Format.

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

Navigation Path: Client -- Client Account-- Click the 'Generate Statements' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The format of the address in the Client statement was incorrect. Also, line breaks were displayed in the statement.

With this release, the above mentioned issue has been fixed. Now the address format is corrected in the Client Statement. The Address format is center justified and is displaying without the line break in the Client statement.

Author: Savitha Siddaraju

95. EII # 127140: Updating 'CURRENT MEDICATIONS' section with two new columns in the 'FaceSheet' Report.

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

Navigation Path 1: 'Client' – 'FaceSheet' – FaceSheet Report.

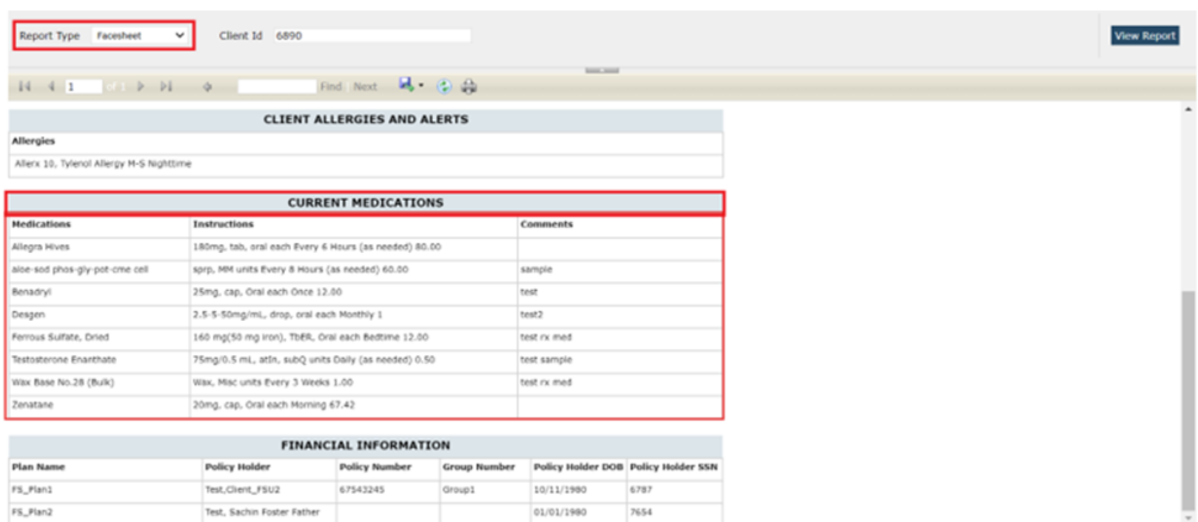
Navigation Path 2: 'My Office' - 'FaceSheet' -- FaceSheet Report.

Functionality 'Before' and 'After' release:

Purpose: To pull data from the system into one place for easy access.

With this release, two new columns are implemented in 'CURRENT MEDICATION' section grid of the 'Facesheet' report.

- The 'Current Medications' section is applicable for both the dropdown values 'Facesheet' and 'Facesheet Full' report.
- The below two columns are newly added into the 'Current Medications' section grid
    - ➢ Instructions
    - ➢ Comments
- For the 'Medications', 'Instructions', and 'Comments' columns, the data will be initialized from the 'RX' which contains all active orders.



CLIENT ALLERGIES AND ALERTS

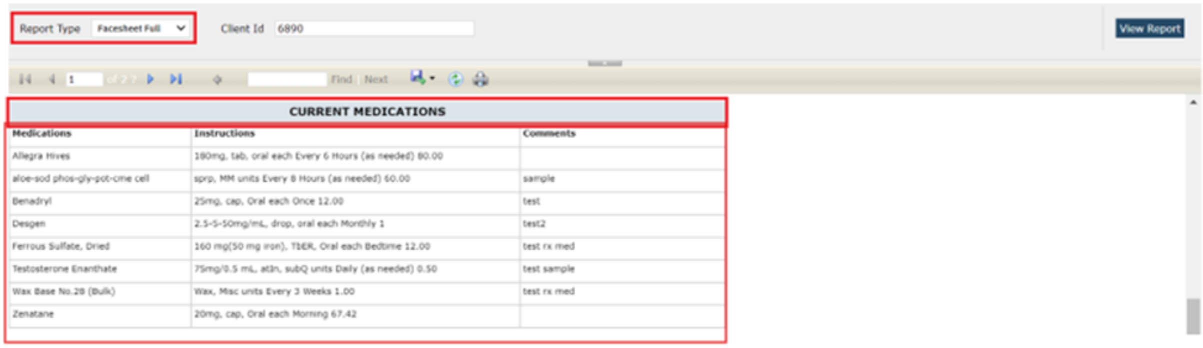
Allergies
Allerx 10, Tylenol Allergy M-S Nighttime

CURRENT MEDICATIONS

Medications	Instructions	Comments
Allegra Hives	180mg, tab, oral each Every 6 Hours (as needed) 80.00	
aloe-sod phos-gly-pot-cme cell	sprp, MM units Every 8 Hours (as needed) 60.00	sample
Benadryl	25mg, cap, Oral each Once 12.00	test
Desgen	2.5-5-50mg/mL, drop, oral each Monthly 1	test2
Ferrous Sulfate, Dried	160 mg(50 mg iron), TbER, Oral each Bedtime 12.00	test rx med
Testosterone Enanthate	75mg/0.5 mL, atIn, subQ units Daily (as needed) 0.50	test sample
Wax Base No.28 (Bulk)	Wax, Misc units Every 3 Weeks 1.00	test rx med
Zenatane	20mg, cap, Oral each Morning 67.42	

FINANCIAL INFORMATION

Plan Name	Policy Holder	Policy Number	Group Number	Policy Holder DOB	Policy Holder SSN
FS_Plan1	Test,Client_FSU2	67543245	Group1	10/11/1980	6787
FS_Plan2	Test, Sachin Foster Father			01/01/1980	7654



Note: The remaining sections in the FaceSheet report will remain the same as existing.

Notifications

Reference No	Task No	Description
96	Core Bugs # 128710	Notifications: Counts not reset to zero unless the Page Refreshed/Reset.

Author: Kiran Tigarimath

96. Core Bugs # 128710: Notifications: Counts not reset to zero unless the Page Refreshed/Reset.

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

Navigation Path: 'Login' -- 'Click on Notifications Icon'**.**

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The notifications icon count was not resetting to zero even though the user has reviewed and read all messages. The icon would only reset to zero when the user logs out and then back or refresh the screen.

With this release, the above-mentioned issue is resolved. Now, the notifications icon count automatically set to zero once user reads all the messages.

Orders

Reference No	Task No	Description
97	Core Bugs # 128224	The 'Order Acknowledgement' is updating with 'Pending Release' as 'Y' by default when download compendium SQL Job processing weekly.
98	EII # 125498	Add SUD checkbox in Order Details.
99	EII # 126897	Order Details: Global Code Category dropdown is changed to searchable textbox.
100	Core Bugs # 128106	QUEST is not able to process the Client Orders.

Author: Munish Sood

97. Core Bugs # 128224: The 'Order Acknowledgement' is updating with 'Pending Release' as 'Y' by default when download compendium SQL Job processing weekly.

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

Navigation Path: 'Administration' – 'Orders' list page – 'Order Details' screen – 'Acknowledgement' — 'Pending Release'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the weekly download compendium SQL Job runs for any Lab Interface, the 'Order Acknowledgement' was updated with 'Pending Release' as 'Y'.

With this release, the above-mentioned issue has been resolved. The 'Order Acknowledgement' will now be updated with 'Pending Release' as 'N' instead of 'Y', when the weekly download compendium SQL Job runs for any Lab Interface'.

Author: Madhu Basavaraju

98. EII # 125498: Add SUD checkbox in Order Details.

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

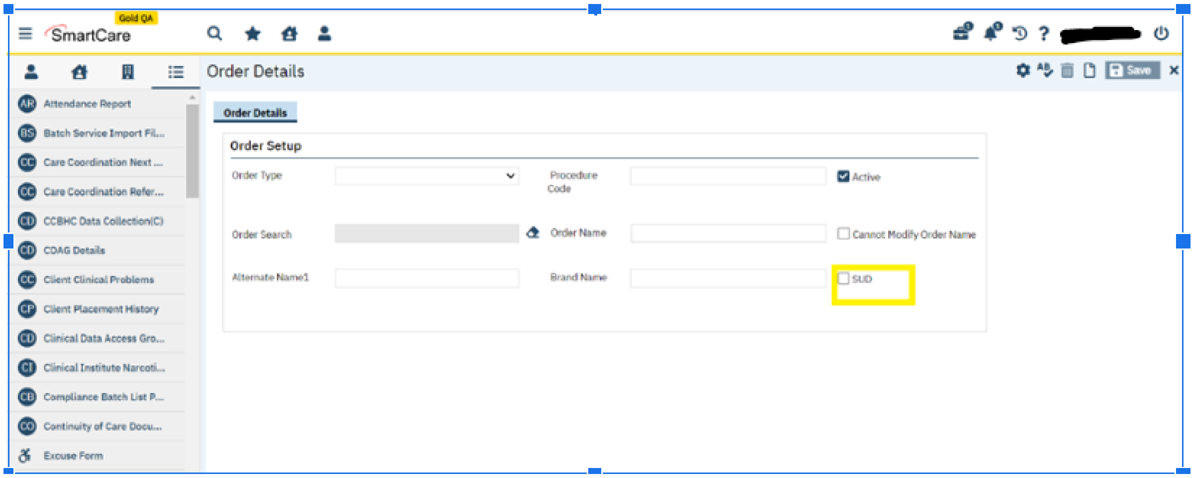
Navigation Path: 'Administration '– Go search – 'Orders' – Click on Create New.

Functionality 'Before' and 'After' release:

Purpose: This is to add SUD field to determinre whether SUD data should be shared in the sharing of data in electronic interface exchanges.

With this release, a new SUD checkbox in the Order details screen is implemented.

- This SUD check box will be displayed when Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' Value is set as 'Yes'.
- When Configuration Key 'DisplaySUDCheckboxToTagDataAsSUD' Value is set as 'No', the SUD checkbox will not be displayed.



Data Model Changes: Added 'SUD' column in 'Orders' table.

Author: Abhishek Naik

99. EII # 126897: Order Details: Global Code Category dropdown is changed to searchable textbox.

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

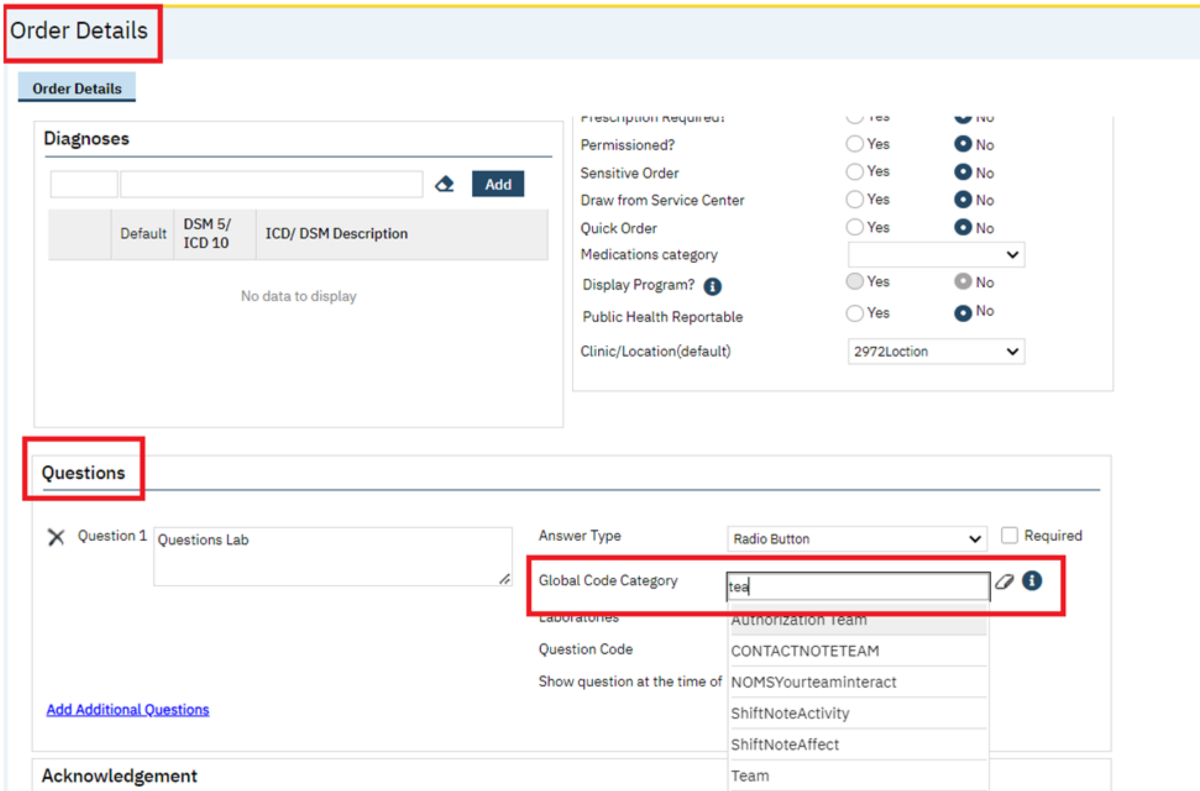
Navigation Path: 'Administration' -- 'Orders' -- Select the Order Type with Question section.

Functionality 'Before' and 'After' release:

Purpose: When the Clients have a large number of flowsheets mentioned under the "Global Code Category" field when the "Answer Type" is selected as "Add Flowsheet" in their environment, they are facing an issue with the loading of the data and the data being displayed in the UI when setting up an Order.

Before this release, here was the behavior. In the Questions section of Order Details screen, the Global Code Category was a dropdown field.

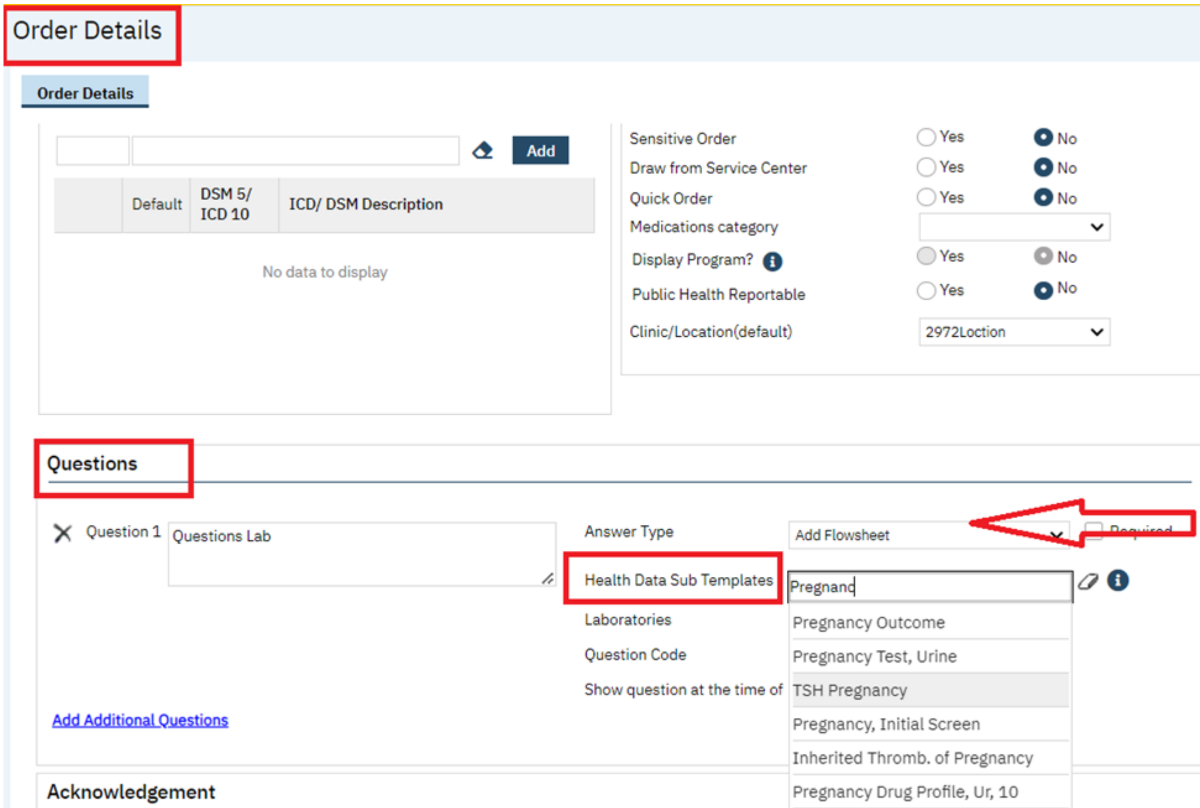
With this release, the Global Code Category dropdown in the Questions section is changed to a searchable textbox from dropdown, where "Answer Type" field is selected with any option, which has the "Global Code Category" field as editable.



Note:

1. This change is applicable for all types of orders with Questions section.

2. When Answer Type is selected as 'Add Flowsheet', the label name Global Code Category will be changed to 'Health Data Sub Templates'.



Author: Jagadeesh Raju

100. Core Bugs # 128106: QUEST is not able to process the Client Orders.

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

Navigation Path 1: 'Client' -- 'Client Orders' -- 'New Order' – Enter all the required details – Click on 'Save and Sign'.

Navigation Path 2: 'Administration' -- 'Messages Interface' -- 'Messages Interface' list page -- 'Message Interface Detail' page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. QUEST was not able to process the Client Orders which were sent from the SmartCare application. The system was displaying the below mentioned error for the HL7 ORM Outbound message in the Message Interface list page.

Error message: *'Invalid length parameter passed to the LEFT or SUBSTRING function'*

With this release, the above-mentioned issue has been resolved. Now, QUEST can process the Client Orders which are sent from the SmartCare application without any error message.

Outlook Sync

Reference No	Task No	Description
101	Core Bugs # 128488	The Deleted 'Scheduled Recurrent Services' in SmartCare are not removed from the 'Outlook Calendar'.

Author: Aishwarya Bommaklar

101. Core Bugs # 128488: The Deleted 'Scheduled Recurrent Services' in SmartCare are not removed from the 'Outlook Calendar'.

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

Navigation Path 1: 'Client' – 'Services' - Click on the 'New' icon - Enter all the fields – 'Save' - Click on the 'Make Recurring' icon - 'Recurring Service' popup – enter the 'Start Date' and 'End Date' range - Select the 'Recurrence' pattern then click on 'Ok' – Click on 'Delete' icon – Select 'Delete this service and all future services in this series for this clients' – Click on 'OK'.

Navigation Path 2: 'My Office' – 'Groups' – Click on 'Group Name' hyperlink – Click on 'Schedule' tab – Click on 'Create New Group Service' – Select the 'Clients' and Enter the 'Date of Service' and Click on 'OK' – Enter all the required details click on 'Save' icon - Click on 'Make Recurring' icon - 'Recurring Service' popup – Enter the 'Start Date' and 'End Date' range - Select the 'Recurrence pattern' then click on 'Ok' – Click on 'Delete' icon – Select 'Delete this service and all future services in this series for this clients' – Click on 'OK'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the 'Recurring Services' and 'Group Services' were deleted along with the 'Future Services', those future entries were not removed from the 'Outlook Calendar'.

With this release, the above-mentioned issue is resolved. Now, when the user deletes the 'Recurring Services' and ' Groups Services', all entries are removed from the 'Outlook Calendar'.

Patient Portal

Reference No	Task No	Description
102	Core Bugs # 128592	Patient Portal - My Account icons for View Past Statements/Make Payment are reversed.

Author: Abhishek Naik

102. Core Bugs # 128592: Patient Portal - My Account icons for View Past Statements/Make Payment are reversed.

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

Navigation Path: Login to SmartCare with Patient Portal Account – Search 'My Account' – Check the View Past Statements and Make Payment icons.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Icons were reversed for View Past Statements and Make Payment icons in the Client Account screen.

With this release, the above mentioned issue has been fixed. Now, the icons are correctly displaying for View Past Statements and Make Payment icons in the Client Account screen.

Payment/Adjustments

Reference No	Task No	Description
103	Core Bugs # 126659	The payment was not distributed correctly for the charges and the leftover amount added to all the charges.
104	Core Bugs # 128373	Typeable Search Staff Dropdown - Payment/Adjustments.

Author: Sahana Gururaj

103. Core Bugs # 126659: The payment was not distributed correctly for the charges and the leftover amount added to all the charges.

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

Prerequisites: Process an 835 file that has multiple charges and doesn't have an SVC segment.

Navigation Path: Go to 'My Office' – 'Payments/Adjustments' – Click on the 'Electronic Remittance' Icon – click on the required 'Import file Id' hyperlink – 'Electronic Remittance File Details' pop-up – click on the 'Process file' button -- click on 'Save' button and click on 'Close' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the 835 file had multiple charges without a SVC segment, in that case, the payment was not distributed correctly for the charges. The leftover amount added to all the charges.

With this release, the above-mentioned issue has been resolved. Now, the system will divide the amounts proportionately based on the charge amount in the Services table and the leftover amount will be applied to only one of the charges, when an 835 file doesn't have a SVC segment.

Author: Namratha Nagraj

104. Core Bugs # 128373: Typeable Search Staff Dropdown - Payment/Adjustments.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' or 'No' by following the **path:**

Administration - Configuration Keys – DisplayStaffAsTypeableSearchTextBox.

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the Staff dropdown fields as type-able search textbox.

- When the key-value is set to "Yes", then staff drop-downs will display type-able search text boxes instead of a drop-down.
- When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path 1: 'My Office' -- 'Payments/Adjustments' -- 'Payments/Adjustments' list page -- 'All Financial Staff' text box in 'Payments/Adjustments' list page

Navigation Path 2: 'Administration' -- 'Configuration Keys' -- Search 'DisplayStaffAsTypeableSearchTextBox' -- Enter the required value -- Click on 'Save'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The staff filter in the 'Payments/Adjustments' list page was displayed as a dropdown. This was causing performance issue when there were large number of staff records.

With this release, the Staff dropdown will be displayed as a Type-able Search box in 'Payments/Adjustments' list page, if the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set to "Yes". Thus improving the system performance when there are large number of staff records.

Peer Record Review

Reference No	Task No	Description
105	Core Bugs # 128554	The user (name with length more than 15) not able to click on 'Assigned Date' link, even though the 'Reviewed By' is logged in staff.

Author: Sachin Ranganathappa

105. Core Bugs # 128554: The user (name with length more than 15) not able to click on 'Assigned Date' link, even though the 'Reviewed By' is logged in staff.

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

Navigation Path: Login to Smart Care – 'Peer Record Reviews (My Office)' – Click on the 'Assigned Date' Hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the Username/Staff length was more than 15 characters, then the user was not able to click on 'Assigned Date' link in the 'Peer Record Reviews' screen to complete Peer Record, even though the 'Reviewed By' is logged in staff.

With this release the above-mentioned issue has been resolved. Now, the users are able to click on 'Assigned Date' hyperlink in the 'Peer Record Reviews' screen to complete Peer Record.

Performance and Scalability Improvements

Reference No	Task No	Description
106	EII # 128123	Prescriber dropdown field is modified to Typable Search in the view Medication History Screen in Rx Application.
107	EII # 126617	Staff dropdown typeable search textbox - Batch Service Entry (Multi-Service Entry), Grievances List Screen & Supervision Level Detail.
108	Core Bugs # 128614	Performance issue in 'Patient Lists/Reminders' list page.
109	EII # 128121	To Convert Rx – 'Prescriber' Dropdown to Type-able Search Textbox".
110	Core Bugs # 128437	Performance issue while loading Inquiries List page.
111	EII # 128424	Team Scheduling Details: Staff dropdown is modified to typeable search textbox
112	EII # 128331	Registration Document (C): Modify the 'Primary Care Coordinator' and 'Medical Provider' dropdown fields to Typeable search textbox fields.
113	EII # 128332	Client Information (Admin): Modify the 'Primary Clinician', 'Primary Physician' and 'Intake Staff' dropdown fields to Type-able search textbox fields.

114	Core Bugs # 128730	'Client Summary' screen is taking more time to load the 'Timeline Summary' graph data.
115	EII # 128227	Authorizations: A typeable search text box is added to display staff on the Authorization list and Authorization Detail page.
116	EII # 128311	Implemented 'ApplyStaffAccessRule' to Staff list in Grievances Details.
117	EII # 128347	Changes for the 'Clinician' and 'Prescriber' dropdown fields to 'Typeable search textbox fields' in the 'Client Lists/Reminders' screen.
118	EII # 128333	Client Information (C): Modify the 'Intake Staff' dropdown fields to Typeable search textbox fields.

Author: Manjunath Malipatil

106. EII # 128123: Prescriber dropdown field is modified to Typable Search in the view Medication History Screen in Rx Application.

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

Prerequisite: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' through the **path**:

Administration – Configuration Keys – DisplayStaffAsTypeableSearchTextBox -- Set as Yes.

Note: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the staff drop-downs will display type-able search text boxes instead of a drop-down.
- When the key value is set to "No, " the staff drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".

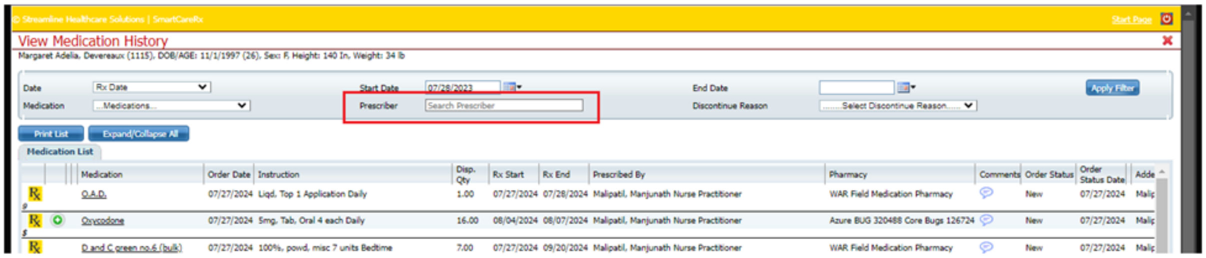
Navigation Path: Login to Rx Application – In Start page Click on Patient Search Button – Perform Patient Search and select a client – In Patient Summary Screen Click on Medication History button – In View Medication history screen check the prescriber field in the Filter section.

Functionality 'Before' and 'After' release:

Purpose: To change the 'Staff' dropdown to a 'Typeable search box' for the View Medication History screen in Rx Application to improve system performance when there are large number of staff records.

Before This release, here was the behaviour. The prescriber field in the View Medication History screen of the filter section was a drop-down field. When there were a large number of staff records, this was causing performance issue.

With this Release, the prescriber field in the Filter section of View Medication History screen is modified as Typeable search text box on updating the 'DisplayStaffAsTypeableSearchTextBox' configuration key to 'Yes'



Author: Kiran Yogendra

107. EII # 126617: Staff dropdown typeable search textbox - Batch Service Entry (Multi-Service Entry), Grievances List Screen & Supervision Level Detail.

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

Prerequisites: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

A) When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

B) When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".

Navigation Path 1: My Office -- 'Batch Service Entry' -- Filter section (Staff) textbox -- Default Values section (Staff) textbox -- Grid (All Clinician) textboxes.

Navigation Path 2: My Office -- 'Grievances' -- Filter section 'About' (Staff) textbox -- Select other required values -- Click on 'Apply Filter'.

Navigation Path 3: Administration -- Search 'Supervision Hierarchy' -- Click on 'New' -- Supervision Level Detail -- Details section 'Manager' textbox -- Other Staff with Permissions (Staff) textbox --Select other required values -- Click on the 'Save' button.

Navigation Path 4: 'Administration– 'Configuration Keys' list page – 'Configuration Key Details' screen.

Navigation Path 5: 'Administration– 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click the 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Purpose: The Staff drop-downs are not responsive because of the huge number of active Staff in the environment, which is inefficient for users with large staff lists.

With this release, the Staff dropdown field is changed to typable search textbox in the following screens. When the 'DisplayStaffAsTypeableSearchTextBox' configuration key value is set to 'Yes', the above-mentioned Staff dropdown will be displayed as Typeable search textboxes.

1. Batch Service Entry (Multi-Service Entry)

- Filter Section
- Default Values
- Client Grid

2. Grievances

- Filter Section - About

3. Supervision Level Detail

- Details section – Manager
- Other Staff with Permissions

The below-mentioned permission type is applied to display the values in the typeable search text staff fields for the Co-Signer dropdown of the 'Document' 'Events' screen and the 'Service Note' screen.

Permission Type: StaffAccessRules

Permission Item:

1. AllStaff
2. LimitedStaff

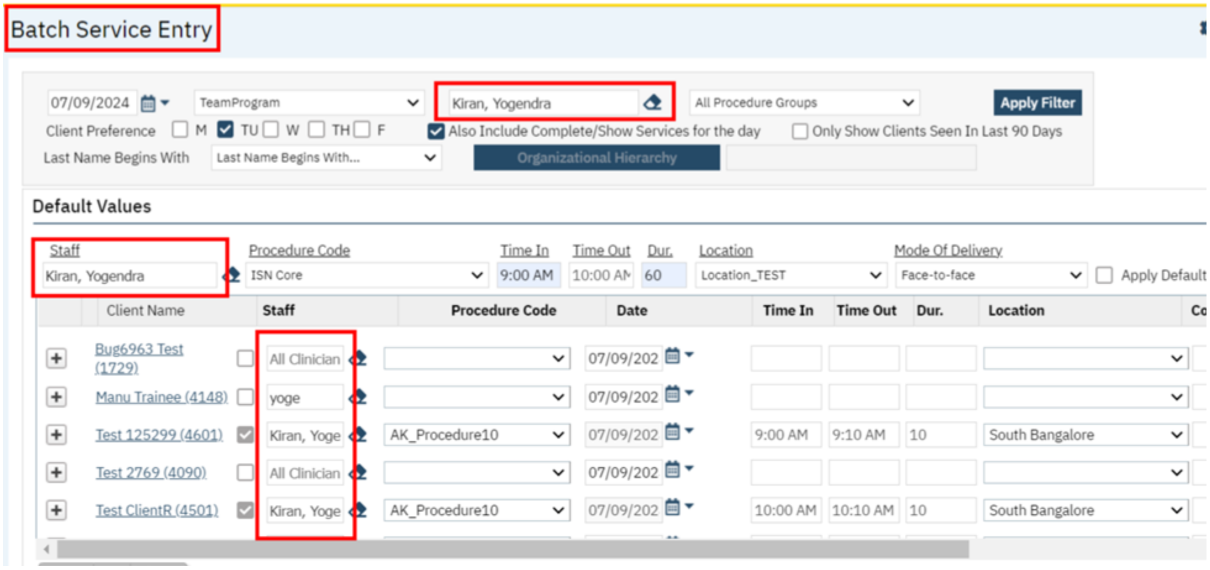
a) If the logged in staff has "LimitedStaff" Access Rule, then the typeable search text box displays the staff who is associated with any of the Program that the logged in staff is also associated with.

b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.

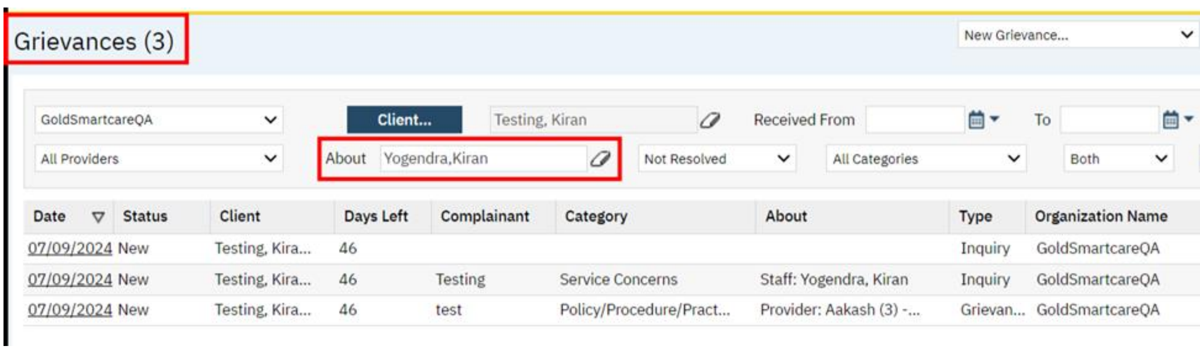
c) If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.

Screenshots for reference:

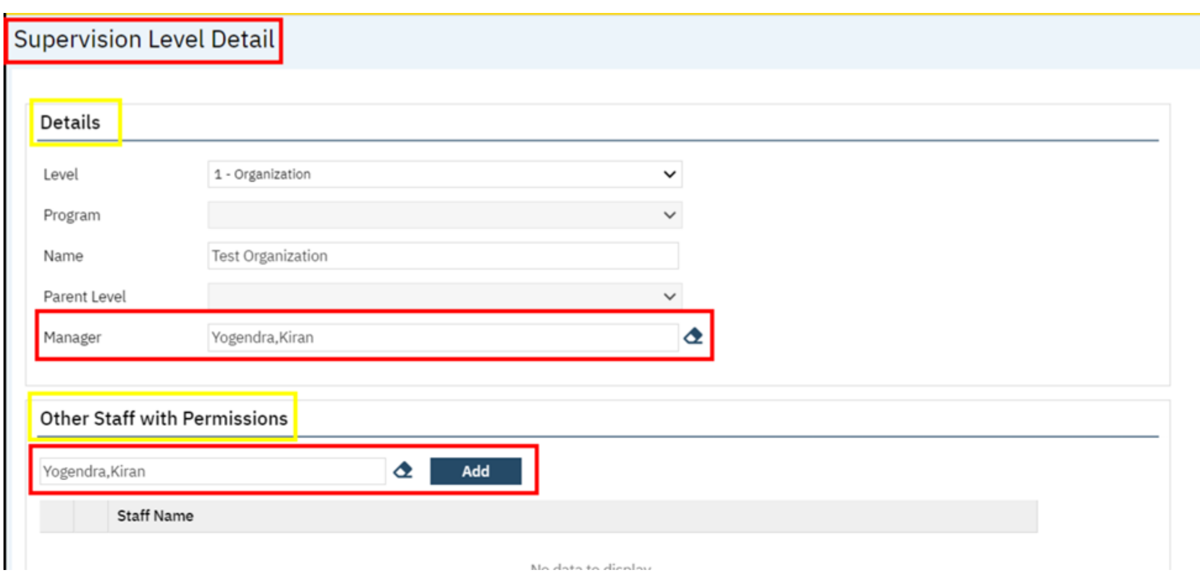
1. Batch Service Entry (Multi-Service Entry)



2. **Grievances**



3. **Supervision Level Detail**



Author: Praveen Gangadhara

108. Core Bugs 128614: Performance issue in 'Patient Lists/Reminders' list page.

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

Navigation Path: 'My Office' - 'Patient Lists/Reminders' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Patient Lists/Reminders' page took longer to load when users attempted to perform a search.

With this release, the above-mentioned issue has been resolved. Now, in the 'Patient Lists/Reminders' list page, the 'From Date and Time' field and 'To Date and Time' field will be initialized one month before the scheduled dates to 'From Date and Time' field and 'Current Date and Time' to 'To Date and Time' field. This enhances the search results to improve the performance in the 'Patient Lists/Reminders' list page.

Data Model Changes:

1. The Index column - 'DocumentVersionId' is added in the 'DocumentDiagnosisCodes' table.
2. The Index columns - [RecordDeleted],[ClientId],[Discontinued] are added in the 'ClientMedications' table.

Author: Rajgopal Yajurvedi

109. EII # 128121: To Convert Rx – 'Prescriber' Dropdown to Type-able Search Textbox".

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

Prerequisites:
The Existing System Configuration Key **'DisplayStaffAsTypeableSearchTextBox'** is used to change the dropdown fields as type-able search textbox by following the below **Path**:

Login to SmartCare Application -- Administration – Configuration Keys --'DisplayStaffAsTypeableSearchTextBox' key.

- When the key-value is set to "Yes", then staff drop-downs will display type-able search text boxes instead of a drop-down.
- When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path: Login to SmartCare Application -- Client' -- 'Medication Management Rx' -- Rx Application -- 'Patient Summary' screen -- Click 'Add medication' button -- Add Medication (Not Ordered Locally) – Select Prescriber.

Functionality 'Before' and 'After' release:

Purpose: The Prescriber dropdowns were not responsive when there were large number of Prescribers in the environment. So, the Prescriber drop-downs are modified to type-able search text boxes to improve the system performance.

Before this release here was the behavior. The names of the staff were listed in a dropdown menu for Prescriber fields, under the Order section of the "Add Medication" page in RX application.

With this release, the Prescriber fields on the Add Medication page, will now be shown as type able-search textboxes when the System Configuration Key "DisplayStaffAsTypeableSearchTextBox" is set to "Yes."

Author: Akshay Viswanath

110. Core Bugs # 128437: Performance issue while loading Inquiries List page.

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

Navigation Path: My Office -- Inquiries -- Inquiries list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. Performance issues occurred when loading the Inquiries list page data.

With this release, the above-mentioned issue has been resolved. Now, the 'Stored Procedure has been optimized to enhance the performance of the Inquiries List page.

Author: Kiran Yogendra

111. EII # 128424: Team Scheduling Details: Staff dropdown is modified to typeable search textbox.

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

Prerequisites: Set the Configuration key 'DisplayStaffAsTypeableSearchTextBox' value as 'Yes' through the **path:**

Administration – Configuration Keys – DisplayStaffAsTypeableSearchTextBox -- Set as "Yes".

Note: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the staff drop-downs will display type-able search text boxes instead of a drop-down.
- When the key value is set to "No, " the staff drop-down will be displayed as a drop-down. This will be the **default value of the key, as it drives the existing behavior**.

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., the same as the key value is "No".**

Navigation Path: Log in to the SmartCare application – Search 'Team Scheduling' – Select the required 'Program' and other filer values – Click on 'Apply Filter' – Click on the 'Schedule' button – Team Scheduling Detail pop-up.

Functionality 'Before' and 'After' release:

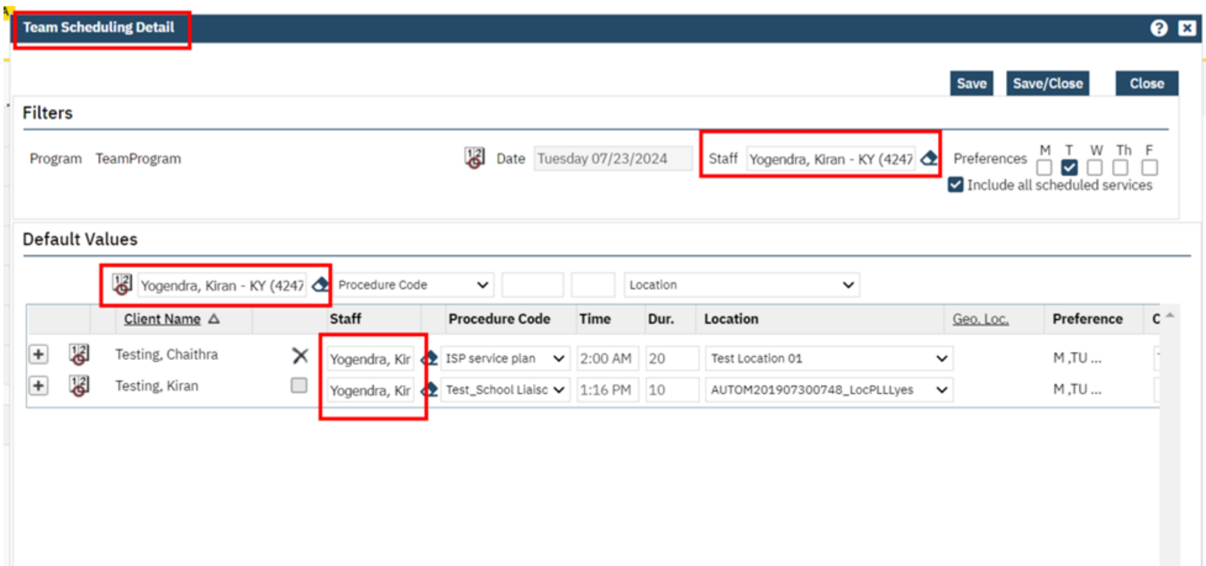
Purpose: The staff dropdowns are not responsive when there are large number of active staff in the environment. Now the typeable search text box is implemented for better system performance.

Before this release, here was the behavior. The Staff field in the Team Scheduling Detail pop up was a drop-down field. When there were a large number of staff records, this was causing performance issues.

With this release, the staff dropdown is modified as typeable search textbox in the Filter Section, Default Values and Client Grid in the Team Scheduling Detail' pop-up screen, on updating the 'DisplayStaffAsTypeableSearchTextBox' configuration key to 'Yes'.

Screenshot for reference:

Team Scheduling Detail Pop-up



Author: Santhosh Huggi

112. EII # 128331: Registration Document (C): Modify the 'Primary Care Coordinator' and 'Medical Provider' dropdown fields to Typeable search textbox fields.

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

Prerequisites:

1. The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

    A) When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

    B) When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path 1: 'Client'– 'Documents' – 'Registration Document (C)' – 'General' tab – 'General Information' section.

Navigation Path 2: 'Administration– 'Configuration Keys' list page – 'Configuration Key Details' screen.

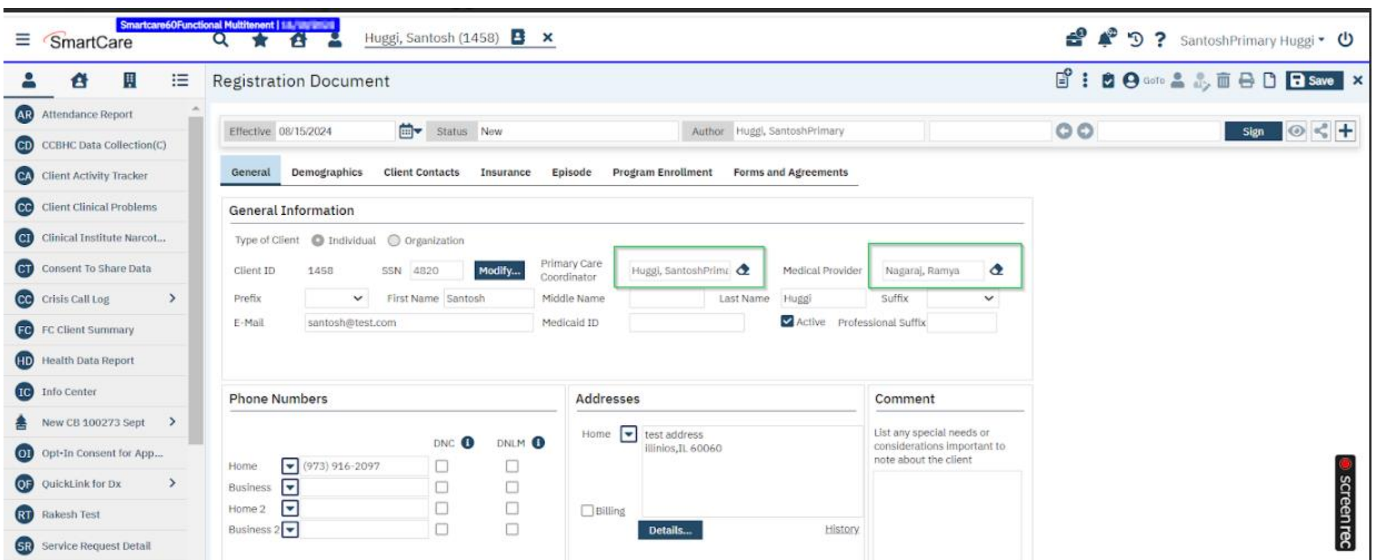
Navigation Path 3: 'Administration– 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click 'Apply Filter' button.

Functionality 'Before' and 'After' release:

Purpose: The staff dropdowns are not responsive when there are large number of active staff in the environment. Now the typeable search text box is implemented for better system performance.

Before this release, here was the behavior. In 'Registration Document (C)' screen, under 'General' tab, in 'General Information' section the 'Primary Care Coordinator' and 'Medical Provider' dropdowns were listed with all the staff and if the system had a large number of qualifying staff values, then it was causing the page to freeze while selecting the dropdown values.

With this release, the above-mentioned issue has been resolved. Now, when the System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes', the 'Primary Care Coordinator' and 'Medical Provider' fields will be displayed as Typeable search textboxes. Also, to limit the data loaded in the fields, the below mentioned permission type is applied to display the values in the 'Primary Care Coordinator' and 'Medical Provider' typeable search text fields.



Permission Type: StaffAccessRules
Permission Item:

1. AllStaff
2. LimitedStaff

a) If the logged in staff has "LimitedStaff" Access Rule, then the typeable search textbox displays the staff who is associated with any of the Program that the logged in staff is also associated with.
b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.
c) If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.

Author: Santhosh Huggi

113. EII # 128332: Client Information (Admin): Modify the 'Primary Clinician', 'Primary Physician' and 'Intake Staff' dropdown fields to Type-able search textbox fields.

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

Pre-requisites:
The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

- When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.
- When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path 1: 'Client' – 'Client Information (Admin)' – 'General' tab – 'General Information' section AND 'Client Episodes' tab – 'Registration/ Episode' section.

Navigation Path 2: 'Administration– 'Configuration Keys' list page – 'Configuration Key Details' screen.

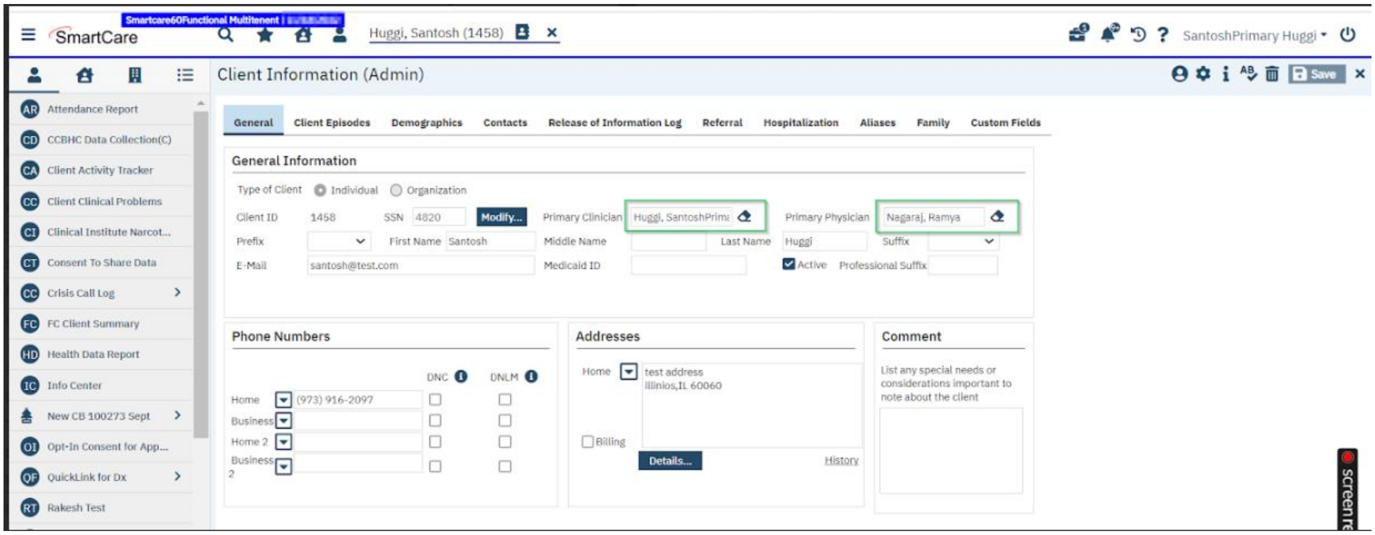
Navigation Path 3: 'Administration– 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click 'Apply Filter' button.

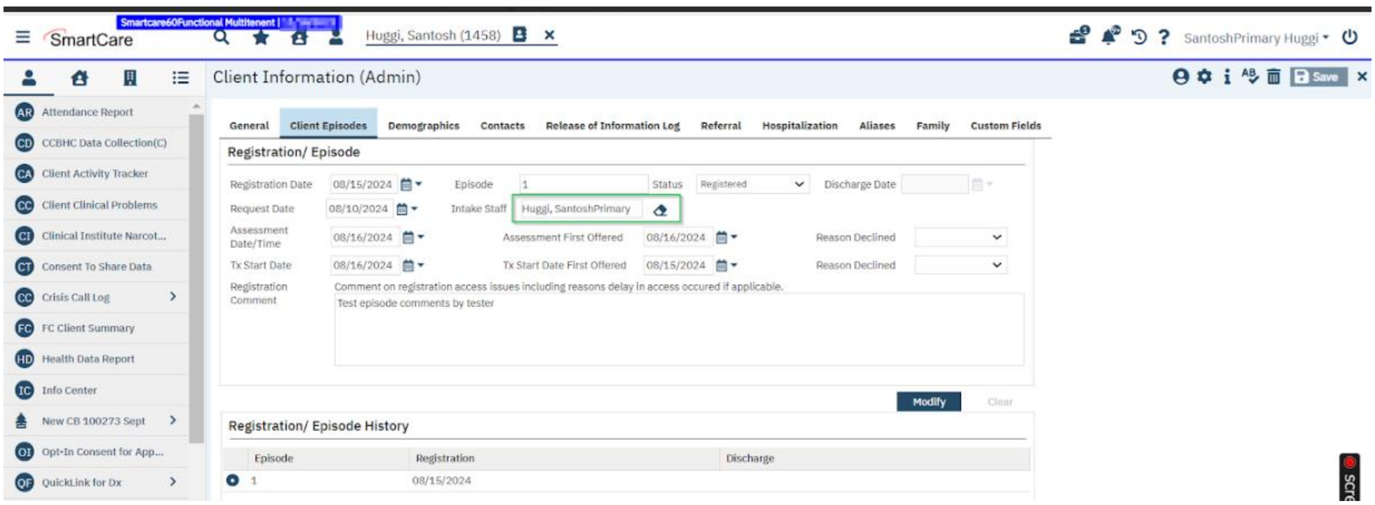
Functionality 'Before' and 'After' release:

Purpose: The Staff dropdowns were not responsive because there were large number of Staff in the environment. So the Staff drop-downs are modified to type-able search text boxes to improve the performance.

Before this release, here was the behavior. In 'Client Information (Admin)' screen, under 'General' tab, in 'General Information' section the 'Primary Clinician', 'Primary Physician' dropdowns and in 'Client Episodes' tab the 'Intake Staff' dropdown field were listed with all the staff and if the system had a large number of qualifying staff values, then it was causing the page to freeze while selecting the dropdown values.

With this release, the above-mentioned issue has been resolved. Now, when System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes', the 'Primary Clinician', 'Primary Physician' and 'Intake Staff' fields will be displayed as Typeable search text boxes. Also, to limit the data loaded in the fields, the below mentioned permission type is applied to display the values in the 'Primary Clinician', 'Primary Physician' and 'Intake Staff' typeable search text fields.





Permission Type: StaffAccessRules
Permission Item:
1. AllStaff
2. LimitedStaff

- If the logged in staff has "LimitedStaff" Access Rule, then the typeable search textbox displays the staff who is associated with any of the Program that the logged in staff is also associated with.
- If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.
- If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.

Author: Santhosh Huggi

114. Core Bugs # 128730: 'Client Summary' screen is taking more time to load the 'Timeline Summary' graph data.

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

Navigation Path: 'Client' – 'Client Summary' – 'Client Summary' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The 'Client Summary' screen was taking a long time to load the 'Timeline Summary' graph data.

With this release, the above-mentioned issue has been resolved. Now, when the user navigates to the 'Client Summary' screen, the 'Timeline Summary' is loaded the data without any performance issue.

Author: Shivakanth Moger

115. EII # 128227: Authorizations: A typeable search text box is added to display staff on the Authorization list and Authorization Detail pages.

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

Prerequisites:

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as type-able search textbox.

A) When the key-value is set to "Yes", then staff drop-downs will display type-able search text boxes instead of a drop-down.
B) When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

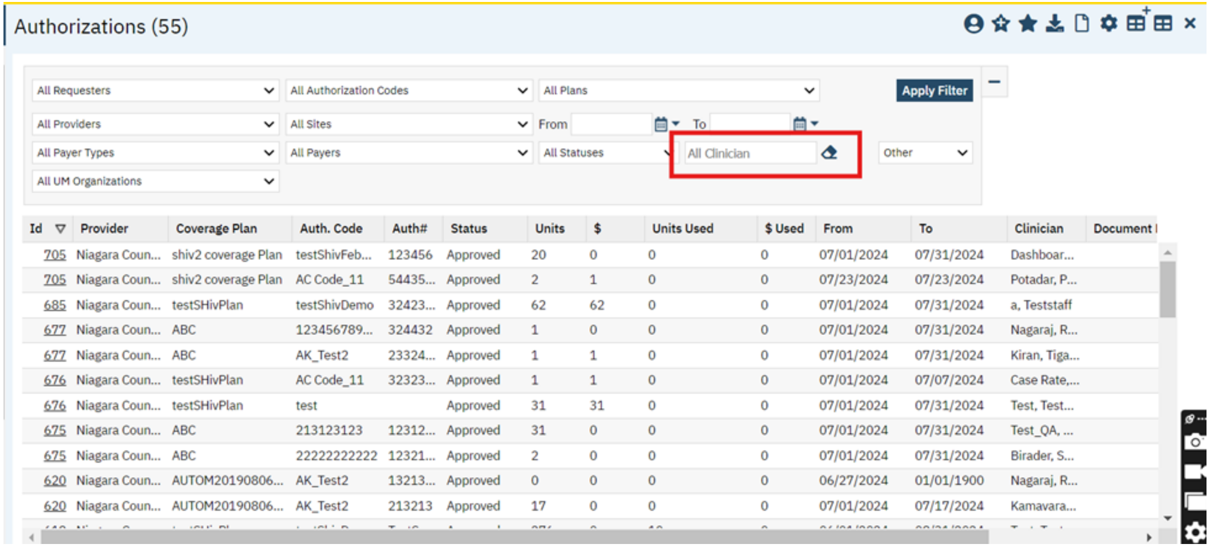
Navigation Path: Log in to 'SmartCare' – select any client – 'Coverage' – 'Coverage' screen – 'New' or click on any record plan name hyperlink text – 'Plan Details' page.

Functionality 'Before' and 'After' Release:

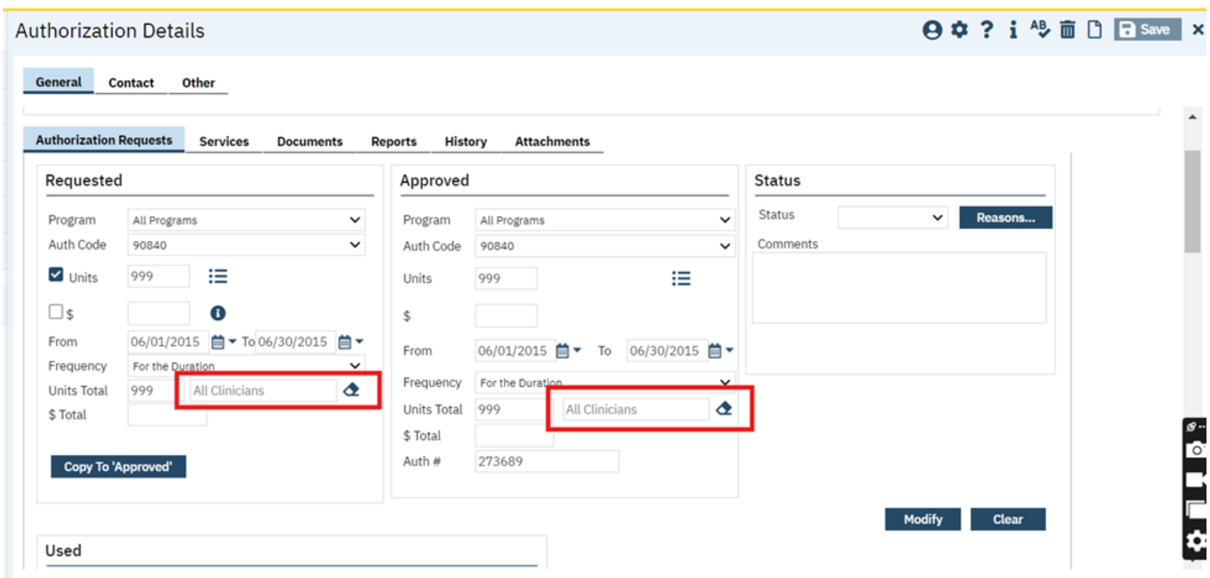
Purpose: The staff dropdowns are not responsive when there are large number of active staff in the environment. Now the typeable search text box is implemented for better system performance.

With this release, the Staff drop-down field is modified to Type-able search text box for the 'All Clinician' field in the 'Authorizations' list page and the Authorization Details screen's 'Requested' section and 'Approved' section. This change will occur when the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set as 'Yes'.

The 'All clinician' field in the 'Authorizations' list page.



The 'All clinician' field in the Authorization Details screen's 'Requested' section and 'Approved' section.



Author: Kiran Yogendra

116. EII # 128311: Implemented 'ApplyStaffAccessRule' to Staff list in Grievances Details.

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

Prerequisites: The 'ApplyStaffAccessRule' Configuration key value is set to 'Yes/No' and look for StaffAccessRules (LimitedStaff and AllStaff) from Staff Details - Roles/Permissions.

Navigation Path: Log in to the SmartCare application – Search 'Grievances' – Select the Customer name under the 'New Grievances' dropdown – Search and Select Client - Grievance Details – Click on the 'About' dropdown and select the 'Staff' list value – 'GrievancesStaffAccessType' pop-up.

Functionality 'Before' and 'After' release:

Purpose: The Staff drop-downs are not responsive because of the huge number of active Staff in the environment, which is inefficient for users with large staff lists. Hence Typeable Search text field is implemented for the Staff to improve the system performance.

With this release, The Staff Access Rule is applied to the Staff list displayed on the 'GrievancesStaffAccessType' pop-up under the 'Grievance Details' screen based on the 'ApplyStaffAccessRule' Configuration key value.

The Scenarios based on the 'StaffAccessRule' permission and 'ApplyStaffAccessRule' Config key value:

1. If the 'ApplyStaffAccessRule' config key value is set to 'Yes' and the StaffAccessRule permission is not granted to LimitedStaff or AllStaff, then all the Staff available in the environment are listed on the pop-up.

2. If the 'ApplyStaffAccessRule' config key value is set to 'Yes' and the StaffAccessRule permission is only granted to AllStaff, all the Staff available in the environment are listed on the pop-up.

3. If the 'ApplyStaffAccessRule' config key value is set to 'Yes' and the StaffAccessRule permission is only granted to LimitedStaff, it displays only the staff associated with any of the Programs that the logged-in staff is associated with.

4. If the 'ApplyStaffAccessRule' config key value is set to 'No', then all the Staff available in the environment are displayed.

Author: Santhosh Huggi

117. EII # 128347: Changes for the 'Clinician' and 'Prescriber' dropdown fields to 'Typeable search textbox fields' in the 'Client Lists/Reminders' screen.

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

Navigation Path 1: 'My Office' – 'Client Lists/Reminders' screen – 'Client Lists/Reminders' list page.

Navigation Path 2: 'Administration' – 'Configuration Keys' list page – 'Configuration Key Details' screen.

Navigation Path 3: 'Administration' – 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click the 'Apply Filter' button.

Prerequisites: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

A) When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

B) When the key-value is set to "No", then the staff drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

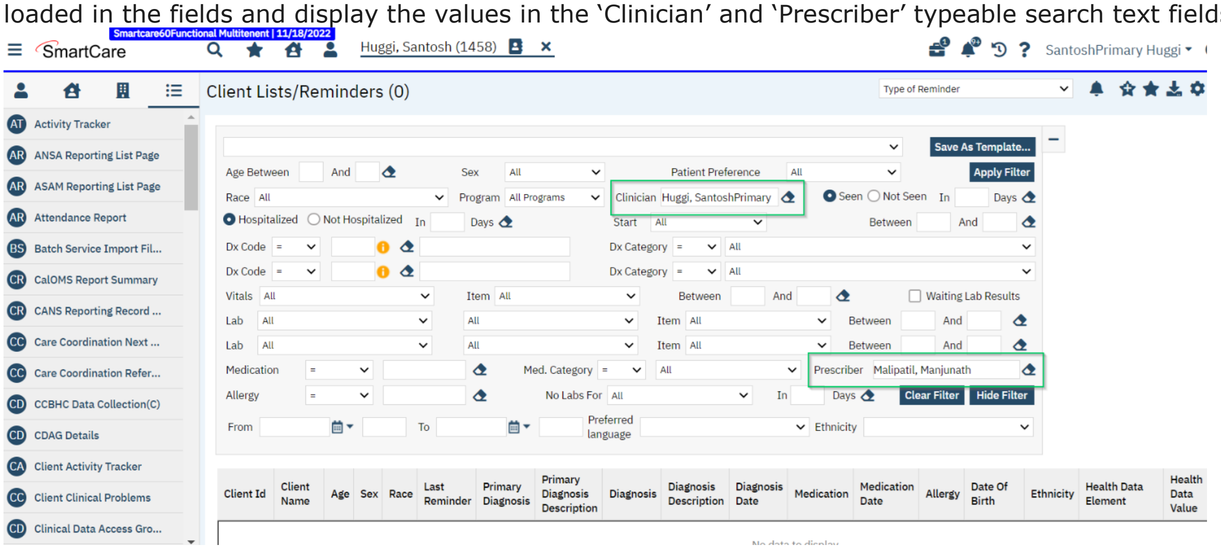
Note: If by chance the value of the key is updated with any value apart from the allowed values, the system will consider **the default behavior, i.e., the same as the key value is "No".**

Functionality 'Before' and 'After' release:

Purpose: To change the Staff dropdown to a Typeable Search box for the 'Client Lists/Reminders' Screen to improve the system performance when there are large number of staff records.

Before this release, here was the behavior. In the 'Client Lists/Reminders' list page, the 'Clinician' and 'Prescriber' dropdowns displayed all staff earlier. If the system had a large number of qualifying staff values, then it was causing the page to freeze while selecting the dropdown values.

With this release, the above-mentioned issue has been resolved. Now, when the System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes', the 'Clinician' and 'Prescriber' fields will be displayed as Typeable search textboxes. Additionally, the below-mentioned permission type is applied to limit the data loaded in the fields and display the values in the 'Clinician' and 'Prescriber' typeable search text fields.



Permission Type: StaffAccessRules
Permission Item:

1. AllStaff
2. LimitedStaff

a) If the logged in staff has "LimitedStaff" Access Rule, then the typeable search textbox displays the staff who is associated with any of the Program that the logged in staff is also associated with.
b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.
c) If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.

Author: Santhosh Huggi

118. EII # 128333: Client Information (C): Modify the 'Intake Staff' dropdown fields to Typeable search textbox fields.

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

Navigation Path1: 'Client' – 'Client Information (C)' – 'Client Episodes' – 'Registration/ Episode' section.

Navigation Path2: 'Administration– 'Configuration Keys' list page – 'Configuration Key Details' screen.

Navigation Path3: 'Administration– 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' – 'Permission' section – Select the Permission Type as 'StaffAccessRules' – click the 'Apply Filter' button.

Pre-requisites:

The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

A) When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.

B) When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Functionality 'Before' and 'After' release:

Purpose: To change the 'Intake Staff' dropdown to a 'Typeable search box' for the 'Document' 'Events' Screen and 'Service Note' screen. This will help to improve the system performance when there are large number of staff records.

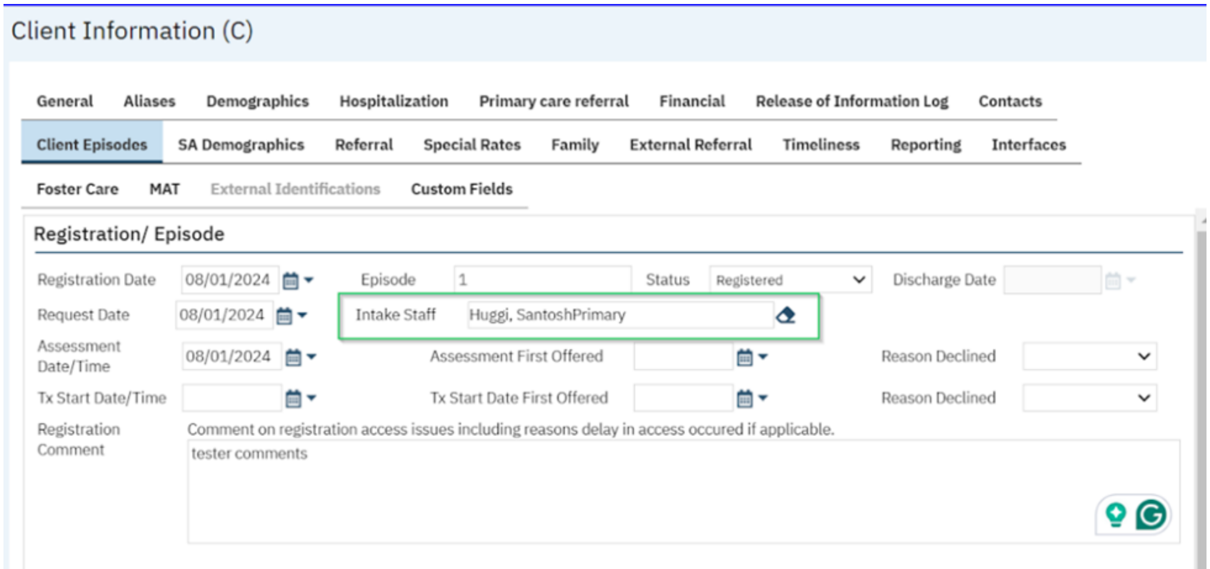
Before this release, here was the behavior. In 'Client Information (C)' screen, under 'Client Episodes' tab the 'Intake Staff' dropdown field was listed with all the staff and if the system had many qualifying staff values, then it was causing the page to freeze while selecting the dropdown values.

With this release, the above-mentioned issue has been resolved. Now, when System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes', the 'Intake Staff' fields will be displayed as Typeable search textbox. Also, to limit the data loaded in the field, the below mentioned permission type is applied to display the values in the 'Intake Staff' typeable search text field.

Permission Type: StaffAccessRules
Permission Item:

- AllStaff
- LimitedStaff

a) If the logged in staff has "LimitedStaff" Access Rule, then the typeable search text box displays the staff who is associated with any of the Program that the logged in staff is also associated with.
b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.
c) If the logged in staff has both "LimitedStaff" and "AllStaff" Access Rule, then "AllStaff" takes Precedence.


Client Information (C)
General
Aliases
Demographics
Hospitalization
Primary care referral
Financial
Release of Information Log
Contacts
Client Episodes
SA Demographics
Referral
Special Rates
Family
External Referral
Timeliness
Reporting
Interfaces
Foster Care
MAT
External Identifications
Custom Fields
Registration/ Episode
Registration Date
08/01/2024
Episode
1
Status
Registered
Discharge Date
Request Date
08/01/2024
Intake Staff
Huggi, SantoshPrimary
Assessment Date/Time
08/01/2024
Assessment First Offered
Reason Declined
Tx Start Date/Time
Tx Start Date First Offered
Reason Declined
Registration Comment
Comment on registration access issues including reasons delay in access occured if applicable.
tester comments

Plans

Reference No	Task No	Description
119	Core Bugs # 128728	Prevent users from entering "Per 0" as a configuration in billing codes/rates.
120	EII # 125502	Add SUD Checkbox in Program Details and Plan Details.

Author: Yashas Kydalappa

119. Core Bugs # 128728: Prevent users from entering "Per 0" as a configuration in billing codes/rates.

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

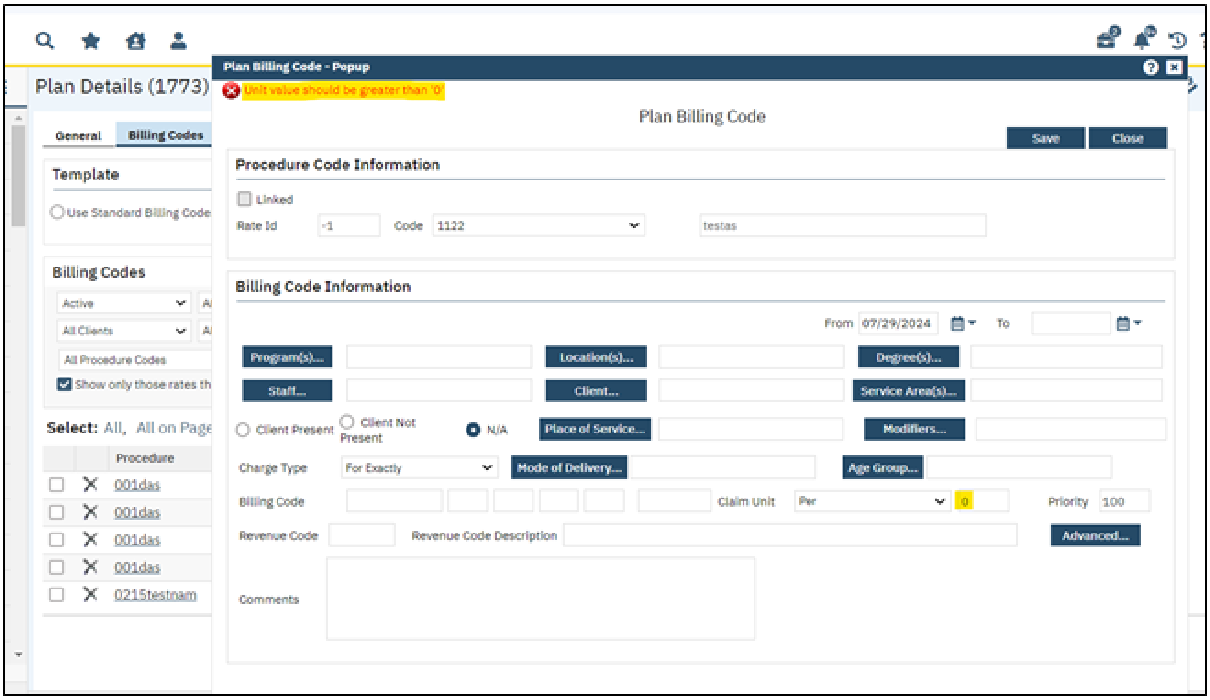
Navigation Path: 'Administration' -- 'Billing Set up' -- 'Plans' -- 'Plans' list page – click on new button or plan name hyper link -- 'Plan Details' screen –- 'Billing Codes' tab -- click on 'Add Billing Codes…' button – 'Plan Billing Code' pop-up – 'claim unit' field.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Billing codes tab of Plan Details Screen, when the coverage plan's billing code was saved with 0 per claim unit under plan billing code pop-up. the Nightly Billing Processes (consolidated) job was throwing the error in reallocation step.

With this release, the above mentioned issue has been resolved. Now, if the user tries to insert number zero for Per claim unit, for the unit under plan billing code pop-up in the billing codes tab, the system will throw the below validation and user will not be able to save the pop-up.

Validation: Unit value should be greater than '0'



Author: Debanjit Das

120. EII # 125502: Add SUD Checkbox in Program Details and Plan Details.

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

Prerequisites:

Set the configuration Key value to "Yes" by following the below **path:**

'Administration' -- 'Configuration Keys' -- Search for 'DisplaySUDCheckboxToTagDataAsSUD'.

Navigation Path 1: 'Administration' -- 'Plans' -- Select an existing Plan.

Navigation Path 2: 'Administration'-- 'Programs' -- Select an existing Program.

Functionality 'Before' and 'After' release:

Purpose: This is to add SUD check box field to determine whether SUD data should be shared in the sharing of data in electronic interface exchanges.

With this release, a new configuration key 'DisplaySUDCheckboxToTagDataAsSUD' is implemented.

Based on the value in the Configuration Key, the 'SUD' checkbox will be visible in the below screens.

1. Plan Details
2. Procedure Code Details

System Configuration Key Details:

Key: DisplaySUDCheckboxToTagDataAsSUD

Read Key as: Display SUD Checkbox To Tag Data As SUD.

Allowed values: Yes, No

Default value: No

Modules: SCM Admin2/Manage Creating Vitals/Labs, SCM Order Entry/OrderSetup, SCM MCO Core/Billing Codes, SCM Admin 1/Manage Authorizations, SCM Client Intake/Client Inquiries(C), SCM Admin 1/Client Programs, SCM Financial 1/ Manage Plans, SCM SmartCare Platform and Framework/Document Framework, SCM FDBMedication DB/Medication Database / FDB.

Description:

This is a new feature being added to the core product by introducing a system configuration key.

Currently, SmartCare does not have a field to identify whether or not a Document or Service Note contains SUD information. So, this change is made as below;

a) A Checkbox named "Contains SUD Information" is included on the Documents, Service Notes, and Event's signature control to identify if the document and service note contain SUD information.

b) A Checkbox named "SUD" is included in the Creating Vitals/Labs, Order Details, Billing Code Details, Authorization Code Details, Inquiry Details, Program Details and Plan Details to identify these as SUD-related.

The value of this key is used to show/hide the newly introduced "SUD", and "Contains SUD Information" checkbox.

A) If the key value is set to "No", "SUD" and "Contains SUD Information" checkboxes will be hidden. **This will be the default value of the key as it drives the existing behavior.**

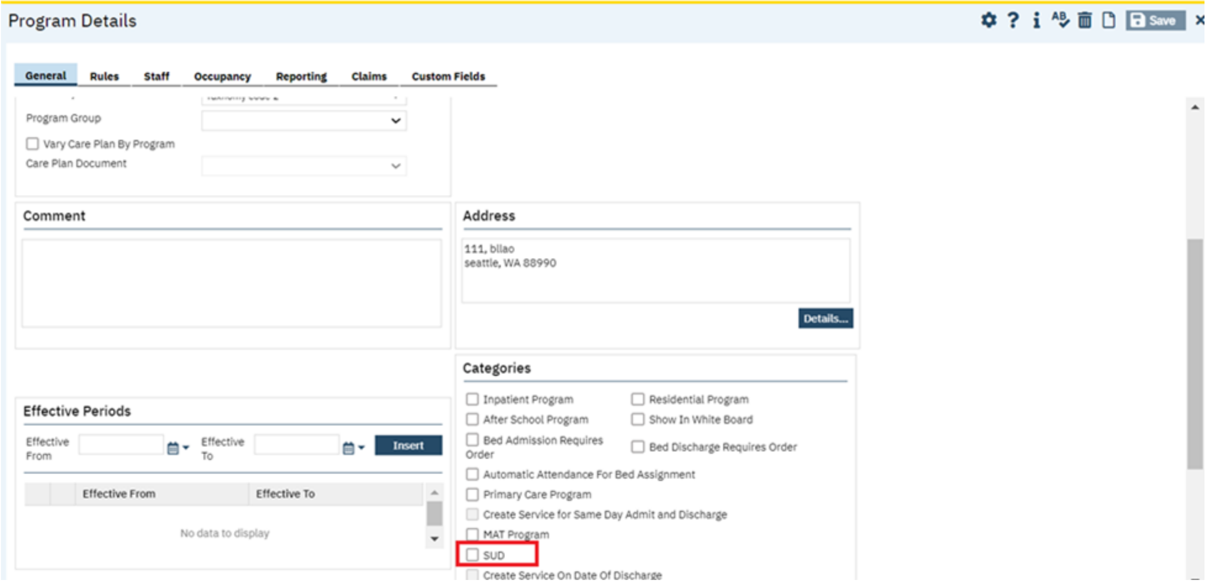
B) If the key value is set to "Yes", "SUD" and "Contains SUD Information" checkboxes will be visible.

Note:

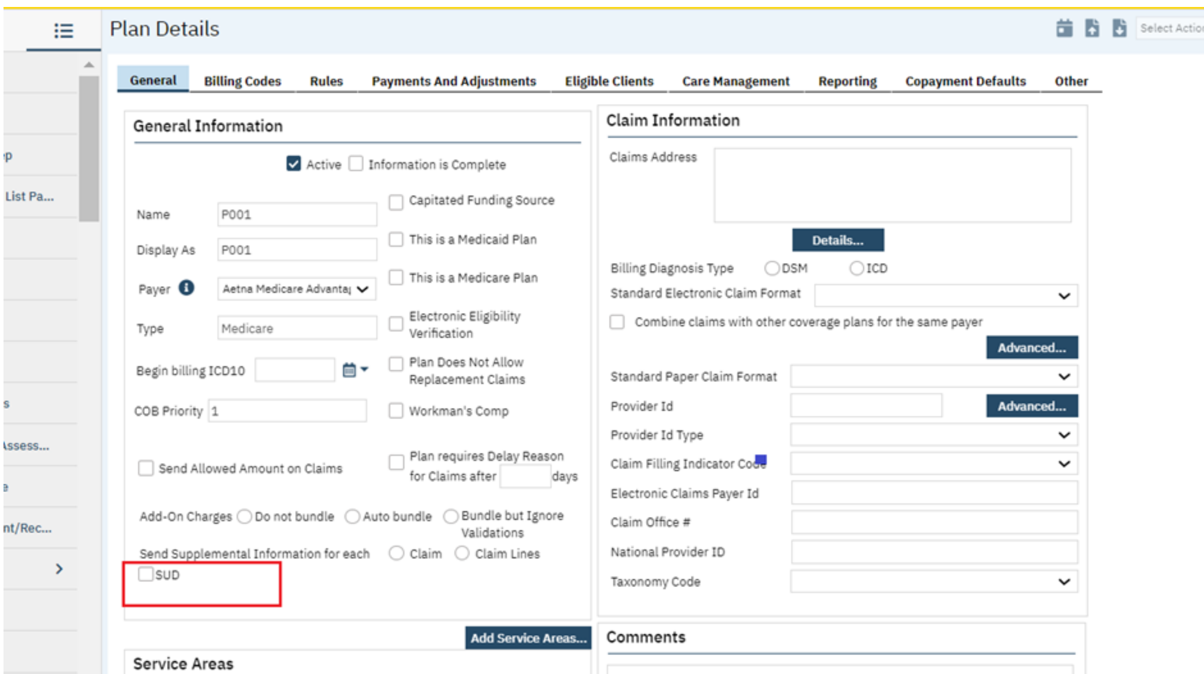
1. If by chance the value of the key is updated with any value apart from the allowed values, the system will consider **the default behavior, i.e. same as the key value being "No".**

2. Acronym: SUD = Substance Use Disorder.

Screenshot of SUD checkbox in the 'Program Details' screen (Configuration Key set to 'Yes')



Screenshot of SUD checkbox in the 'Plan Details' screen (Configuration Key set to 'Yes')



Data Model Changes: Added a new column called 'SUD' in the 'Programs' and 'CoveragePlans' tables.

Primary Care

Reference No	Task No	Description
121	EII # 126678	Primary Care: need "view previous data" option for ob/gyn flow sheet data.
122	Core Bugs # 128493	'Program Requested' dropdown in the Approve tab is not initializing the values from Request tab.
123	Core Bugs # 128626	Allergy Popup was not reappearing after Closing Out.

Author: Varsha Patil

121. EII # 126678: Primary Care: need "view previous data" option for ob/gyn flow sheet data.

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

Navigation Path 1: Administration – Tag(s) – New button – 'Display Flow Sheet Data' in 'Tag Behavior' – # Of Previous Records To Display.

Navigation Path 2: Client – Flow Sheet – 'Primary Care OBGYN' Flow sheet – 'New button'.

Navigation Path 3: Client – Medical Progress Note – 'New button' – Template – 'OB/GYN Flowsheet' tag.

Functionality 'Before' and 'After' release:

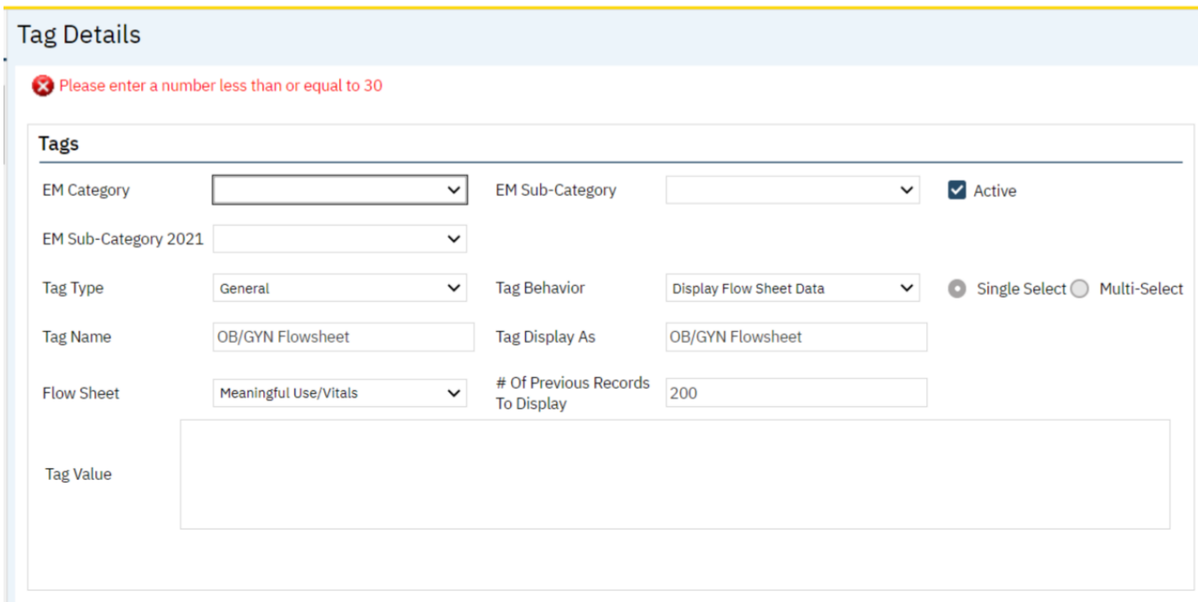
Purpose: Ability to view today (current) and the "last visit" data entered in the client's OB/GYN flow sheet data in the PC Medical Progress Note.

With this release, the functionality of 'OB/GYN Flowsheet' tag in Medical Progress Note has been updated to view today (current) and the "last visit" data entered in the client's OB/GYN flow sheet data. The following changes are made to enable this functionality:

Changes in Tag Details:

a. When the option 'Display Flow Sheet Data' is selected in the tag behavior, a new textbox called ' # Of Previous Records To Display' will get displayed.
b. The number mentioned in this textbox will be used to display the number of previously signed data from the flow sheet, in the medical progress note.
c. The textbox will allow only numeric values less than or equal to 30. Validation message will be displayed to enter a value less than or equal to 30.

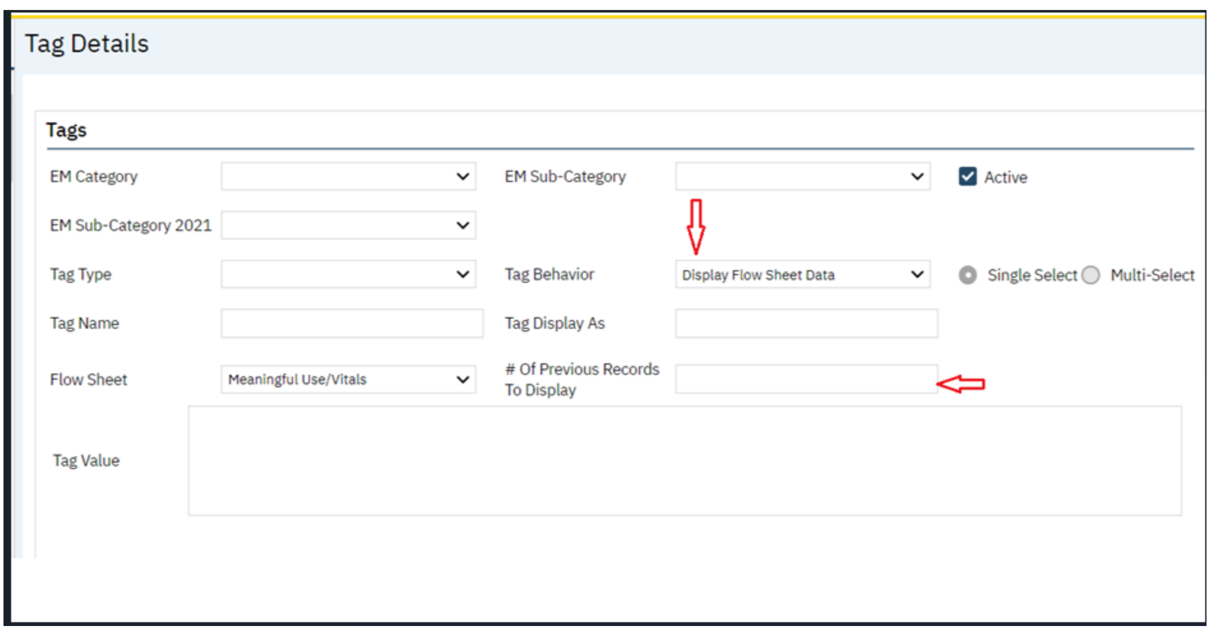
Validation message: Please enter a number less than or equal to 30



d. If the user enters '0', then only the latest signed document will be displayed.

d. For the existing tags, where the option "Display Flow Sheet Data" is selected in the tag behavior, the value of the textbox will be blank.

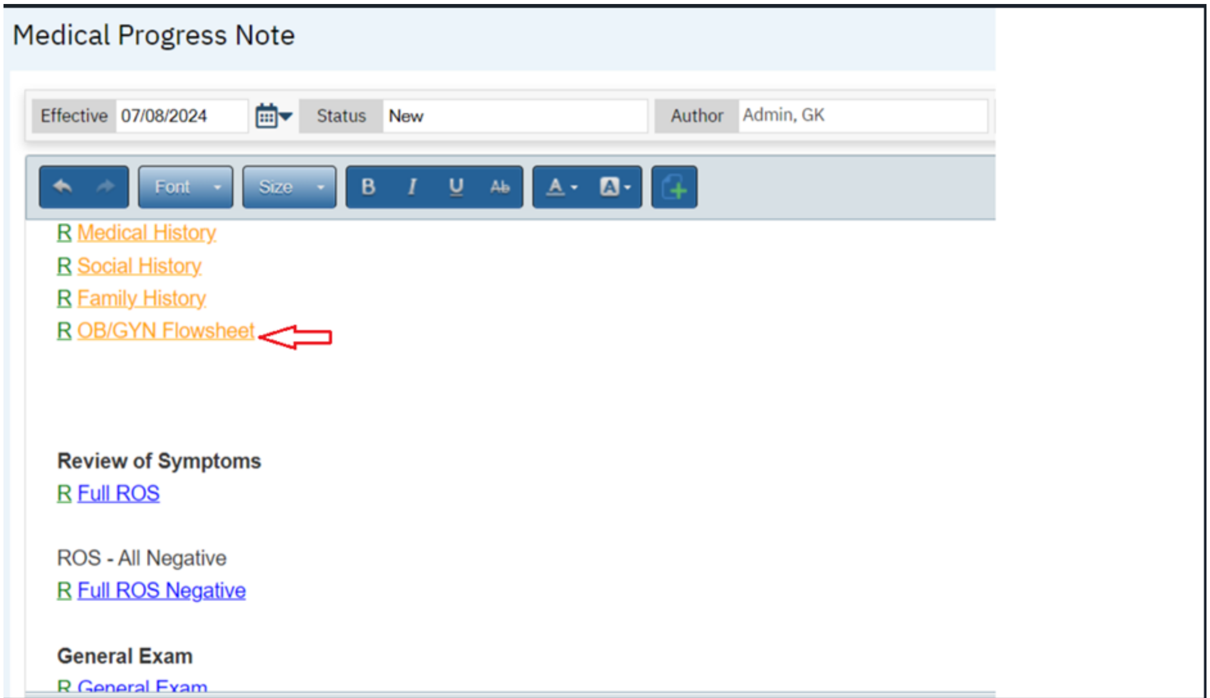
Tag details screenshot:

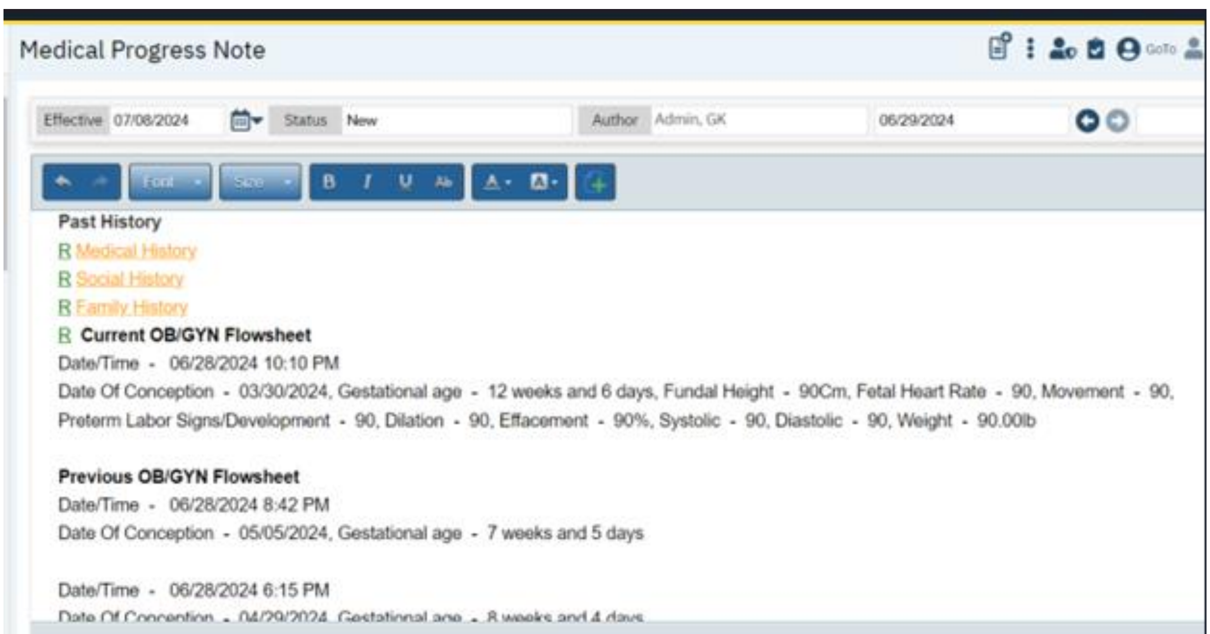


Medical Progress Note:

a. When the tag ‘OB/GYN Flowsheet’ is selected, 2 fields details called ‘Current OB/GYN Flowsheet’ and ‘Previous OB/GYN Flowsheet’ will display.

Medical Progress note screenshot:





a. 'Current OB/GYN Flowsheet' will display the details of the latest signed 'Primary Care OBGYN' flow sheet.

b. 'Previous OB/GYN Flowsheet' will display previously signed records depending upon the number mentioned in the '# Of Previous Records To Display' in Tag details.

c. When "R" is selected, it will reset the line to the tag 'OB/GYN Flowsheet'.

Data Model Change: Added "NumberOfPreviousRecordsToDisplay" column in NoteTags table.

Author: Lakshmi Kumarappan

122. Core Bugs # 128493: 'Program Requested' dropdown in the Approve tab is not initializing the values from Request tab.

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

Pre-requisite:

1. The system configuration key 'DisplayCDAGSectionInStaffDetails'value is set to 'Yes'.
2. The system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'
3. CDAG Group is added to the Staff.
4. Search for a client and make sure the client is enrolled in the CDAG programs.

Navigation Path: 'Client' Search -- select a client -- 'Service Request - Review/ Approval' screen --'New 'icon -- 'Request 'tab -- Enter the required field – Click on Save button -- 'Approval' tab -- click the radio button of the Auth List grid of the Service Request Details session.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When CDAG key was "ON" and the user selected the radio button of the 'Auth List grid' in the Approve tab, the corresponding 'Program Requested' dropdown value was not initializing from Request tab of the "Service Request – Review/ Approval Detail" screen.

With this release, the above-mentioned issue has been resolved. Now, 'Program Requested' dropdown value in the Approve tab is correctly initializing from request tab.

Author: Chaitali Patil

123. Core Bugs # 128626: Allergy Popup was not reappearing after Closing Out.

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

Navigation Path: Perform 'Client search' -- Go search -- Client Allergies –search for the allergy in the allergy field-- Client Allergies pop up will be open – select allergy and click on 'Cancel' button or 'X' icon – again search for the allergy – Client Allergies pop up should be open.

Functionality Before and & After Release:

Before this release, here was the behavior. After entering a client allergy in the allergy field, the user received the popup to select the correct allergy but when the user clicked on 'cancel' or (hit the 'X' Icon) button, and when user again tried to search allergies in the allergy field for the second time, the 'Client Allergies pop up' was not appearing. And also, the previously entered text was not clearing on clicking on Cancel or 'X' button.

With this release, the above-mentioned issue has been Resolved. Now, Allergies pop up is appearing whenever user search for allergies in the allergy field. And previously entered text is also clearing on clicking Cancel or 'X' button.

Procedure/Rates

Reference No	Task No	Description
124	EII # 127999	Changes to the Procedure Code Details screen.
125	Core Bugs # 128470	Type able Staff Search text box has been added under Procedure/Rates list page.
126	Core Bugs # 128685	The decimal values are not imported from Excel.
127	EII # 128074	Associate documents within Procedure Code and display those documents on the Service Note.

Author: Yashas Kydalappa

124. EII # 127999: Changes to the Procedure Code Details screen.

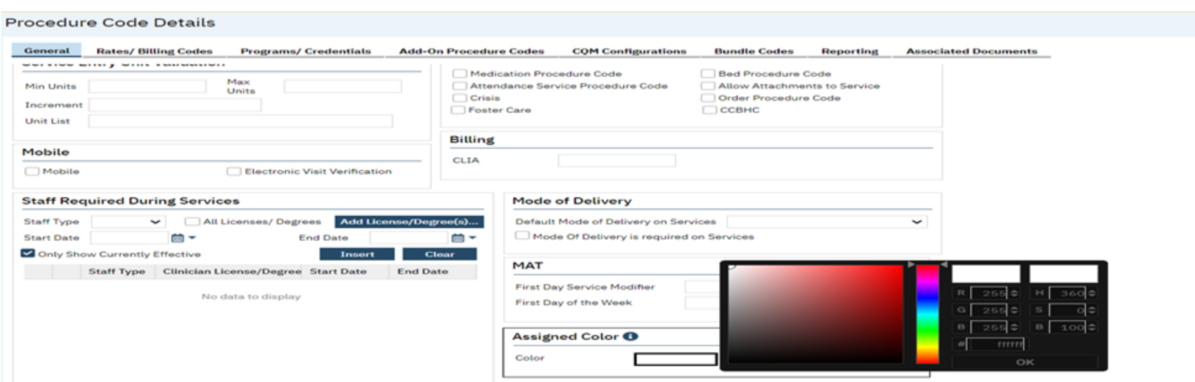
Release Type: Change **|** **Priority:** Urgent

Navigation path: 'Administration' -- 'Billing Setup' -- 'Procedure/Rates' -- 'Procedure/Rates' list Page – click on procedure name hyperlink or new icon -- 'Procedure Code Details' screen -- 'General' tab -- 'Assigned Color' section.

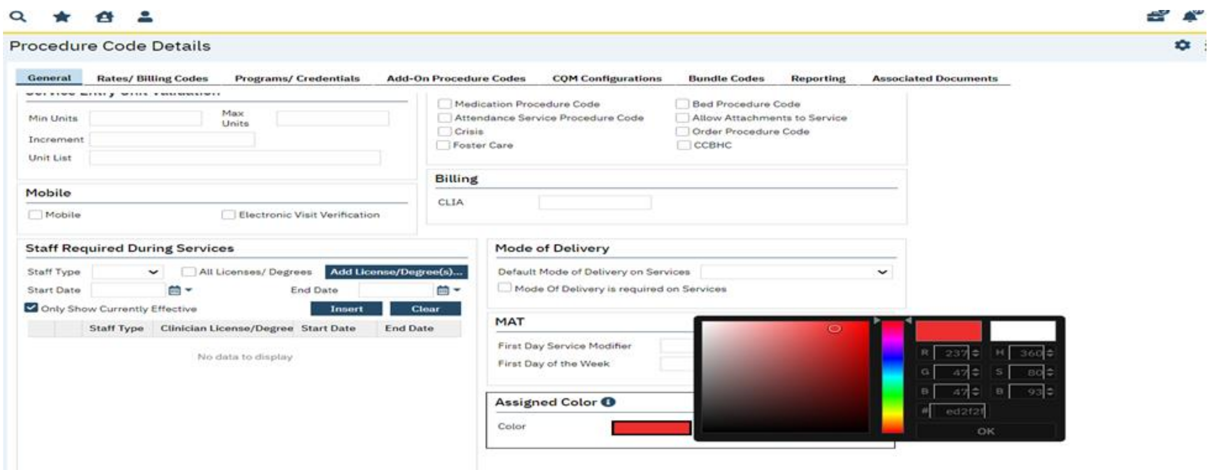
Functionality 'Before' and 'After' release:

Purpose: Ability to display Service entries in different colors on My Calendar screen.

With the release, a new text box called 'Color' has been implemented under the 'Assigned Color' section in the General tab of Procedure Code Details screen.



- When the user clicks inside the 'Color' text box the system will display the 'Color Selector' pop-up, when the user selects any color in the pop-up, the same color will be filled in the 'Color' text box.



- Service entries with a Procedure Code that has a color setup will be displayed in that specified color on the My Calendar screen.
- On hovering the mouse on the 'i' icon in the assigned color section, the system will show up the below text.

"This color coding is used to display the color for service entries in My Calendar screen."

Data Model Changes: The 'Color' column included in ProcedureCodes table.

Author: Yashas Kydalappa

125. Core Bugs # 128470: Type able Staff Search text box has been added under Procedure/Rates list page.

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

Prerequisites:

1. Set the 'DisplayStaffAsTypeableSearchTextBox' configuration key value to 'Yes' or 'No' through the **path:**

'Administration' -- 'System Settings' -- 'Configuration Keys' -- 'Configuration Keys' list page – select the 'DisplayStaffAsTypeableSearchTextBox' key

2. Select the procedure code rates with staff name and save it in Procedure Code Details screen under 'Rates/Billing Codes' tab through the **path:**

'Administration' -- 'Billing Set up' -- 'Procedure/rates' -- Procedure/rates' list page - click on the procedure name hyperlink under procedure/rates key list page – Procedure Code Details screen – click on the Rates/Billing codes tab under procedure code details screen – click on 'Staff' button in rate section – search and save the staff select staff pop-up then click on modify and save the procedure code details screen.

Note: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the staff drop-down will display type-able search text boxes instead of a drop-down.
- When the key value is set to "No", the staff drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No"**.

Navigation Path: 'Administration' -- 'Billing Set up' -- 'Procedure/rates' -- 'Procedure/rates' list page -- 'All Staff' text box under filer section of procedure rate list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Procedure Rates' list page, The staff filter was displayed as a dropdown and this was impacting the performance of the application when there were a large number of staff records present for the procedure rates.

With this release, the above-mentioned issue has been resolved. The Staff dropdown is changed to Type-able Search box in 'Procedure Rates' list page and this will be displayed if the system configuration key 'DisplayStaffAsTypeableSearchTextBox' is set to "Yes". Thus improving the system performance in procedure rates list page.

Author: Yashas Kydalappa

126. Core Bugs # 128685: The decimal values are not imported from Excel.

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

Navigation Path: 'Administration' -- 'Billing Setup' -- 'Procedure/Rates' -- 'Procedure/Rates' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user imported the Excel spreadsheet into the Procedure Code Details screen, the 'BillingCodeClaimUnits' column values were not importing the decimal values mentioned in the Excel. Instead, the decimal values turned into zeros.

With this release, the above-mentioned issue has been resolved. Now, the values added (even if the value is decimal) in the excel document will be imported for the 'BillingCodeClaimUnits' column in the Procedure Code Details screen.

Author: Rinki Kumari

127. EII # 128074: Associate documents within Procedure Code and display those documents on the Service Note.

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

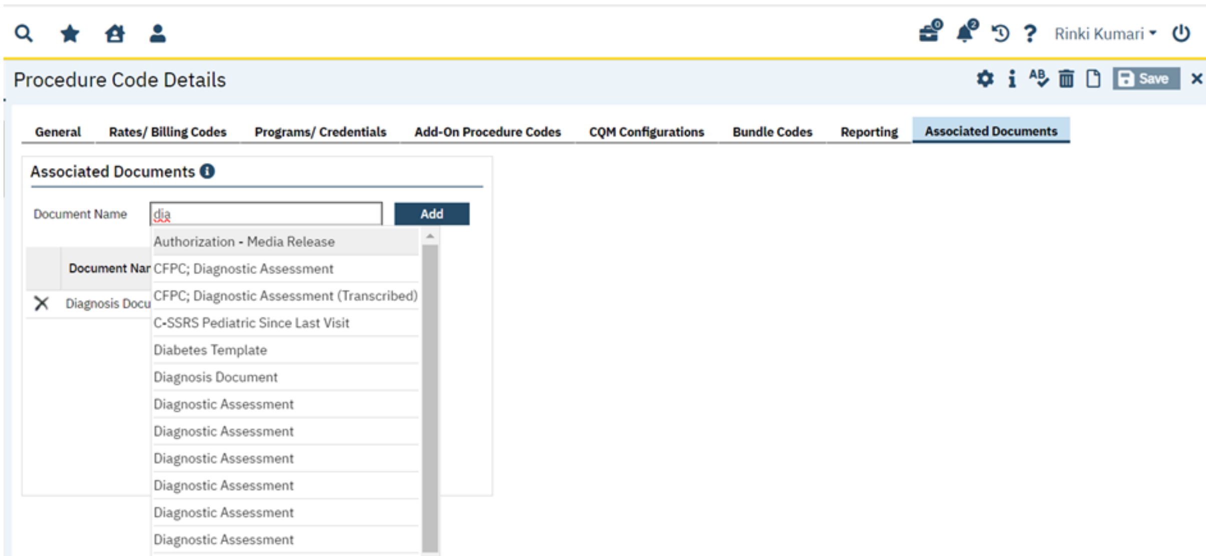
Navigation Path: ''Administration' -- 'Billing Setup' -- 'Procedure/Rates' -- 'Procedure/Rates' list Page – Click on new icon -- 'Procedure Code Details' screen – 'Associated Document' tab – 'Associated Documents' section.

Functionality 'Before' and 'After' release:

Purpose: Ability to view the associated documents in the Service note that will remind the Clinicians to complete it and they can easily access the document without navigating to other screens.

With this release, a new 'Document Name' typeable search text box is added in the 'Associated Documents' section of the 'Associated Documents' tab in the 'Procedure Code Details' screen.

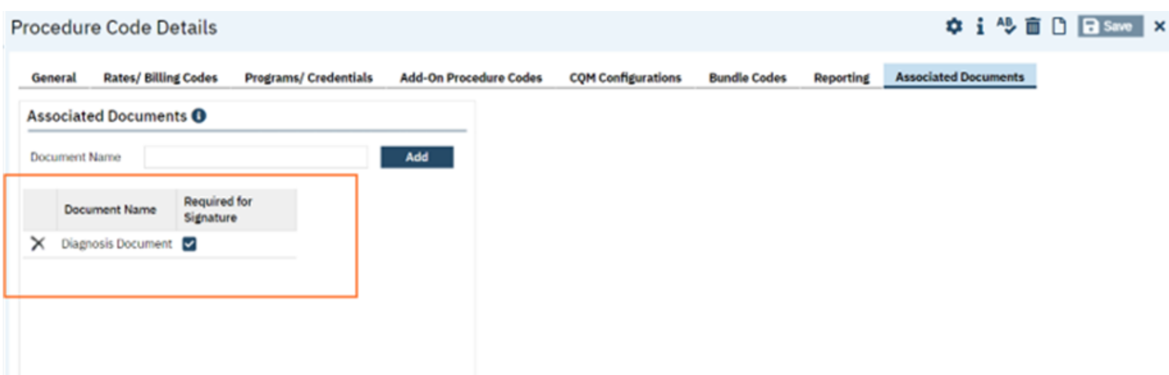
- The Document Name typeable search text box will display the list of all active documents based on the text entered.



- Info icon is added next to the 'Associated Documents' Section Name and on hover over displays the below mentioned text:

"The list below indicates documents that are associated to this procedure code and will allow users to navigate to them via the Service Note. The ones marked as required will need to be completed to sign the Service Note."

- Add button is added next to the 'Document Name' typeable search textbox, on Clicking on Add button the selected document will be added to the grid.



- Grid will display with the columns 'Document Name' and 'Required for Signature'.
- "Document Name" column will be the name of the document added.

- "Required for Signature" will be a checkbox that the user can select if that document has to be signed in order to sign/complete the service note.
- All the documents (Document Codes) added to the list of associated documents will be listed on the Service Note screen and allows users to navigate to each of those if they need to initiate one and sign it.

Data Model Changes: New Table ProcedureCodeAssociatedDocuments is added.

Rx Application

Reference No	Task No	Description
128	Core Bugs # 128586	Wrong NDC code is sent to Surescripts when the medication is prescribed electronically.
129	EII # 125504	To Add a column 'SUD' in the table 'MDMedicationNames'.
130	Core Bugs # 128557	Refill allowed for schedule II.
131	EII # 128122	To Convert 'Prescriber' Dropdown to Type-able Search Textbox in New medication, Re-Order Medication and Change Order Medication Screen.
132	EII # 126812	Rx Application – On clicking the 'INSPECT (PMP)' button, the user gets an Error Message in multiple Message tags.
133	Core Bugs # 128718	Issues with Allowing Special Characters in Client's First or Last Name.

Author: Manjunath Malipati

128. Core Bugs # 128586: Wrong NDC code is sent to Surescripts when the medication is prescribed electronically.

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

Navigation Path: Client -- Medication Management (RX) -- 'Patient Summary' screen -- Click on 'New Order' button – 'New Medication Order' screen -- Select EPCS Enabled Pharmacy -- select Medication -- Enter all the required fields -- click on Insert button -- Click on 'Prescribe' Button -- Prescribe screen - Check the "Ready To Sign" checkbox in the grid - click on Prescribe Button -- Approve the soft token in HID Approve app.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user prescribed the medications electronically, Wrong Product Code (NDC Code) was sent to the Surescripts.

With this release, the above-mentioned issue has been resolved. Now, when the user prescribes a medication electronically, the Correct Product Code (NDC Code) is sent to the Surescripts.

Author: Rajgopal Yajurvedi

129. EII # 125504: To Add a column 'SUD' in the table 'MDMedicationNames'.

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

Navigation Path: Login to SmartCare Application -- 'Administration' -- 'Table Editor'.

Functionality 'Before' and 'After' release:

Purpose: This column is being added so that user can have a way to flag the specific medications as being used for SUD (or potentially being used for SUD) and thus a customer may want to restrict the electronic sharing of this medication data when this is prescribed for a patient.

With this release, a column 'SUD' is added in the MDMedicationNames table.

Data Model Change: The SUD column is added to the MDMedicationNames table.

Author: Manjunath Malipati

130. Core Bugs # 128557: Refill allowed for schedule II.

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

Navigation Path: Login to SmartCare Application -- Select a client -- Medication Management (Client) -- Patient Summary screen (RX Application) -- Click on new Order button -- In New medication Order screen -- Select EPCS Enabled Pharmacy -- Select a Scheduled II controlled medication -- enter all the required fields -- click on insert button -- Check the label (Refills).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user prescribed the Scheduled II Controlled medications, if any additional orders were present, they were also sent as refills to the pharmacy.

With this release, the above-mentioned issue is fixed. When a user prescribes a Scheduled II Controlled medications, if any additional orders are present, they are sent as Additional Orders (only) to the pharmacy.

Author: Rajgopal Yajurvedi

131. EII # 128122: To Convert 'Prescriber' Dropdown to Type-able Search Textbox in New medication, Re-Order Medication and Change Order Medication Screen.

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

Prerequisites:

1. The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as type able search textbox by following the below **path:**

   Login –– Administration –– Configuration Keys –– 'DisplayStaffAsTypeableSearchTextBox' key.

- When the key-value is set to "Yes", then the staff drop-downs will display type able search text boxes instead of a drop-down.
- When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

2. Medication Prescribed via below path.

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 'Prescribe' button - Prescribe Page – 'Prescribe' button – 'Patient Summary' page.

Navigation Path 1: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Click 'New Order' button – New Medication order page – Order Section – Prescriber Field.

Navigation Path 2: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Select the above prescribed Medication - Click 'Re-Order' button – Re-Order Medication order page– Order Section – Prescriber Field.

Navigation Path 3: Login to SmartCare Application -'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Select the above prescribed Medication - Click 'Change Order' button – Change Medication order page– Order Section – Prescriber Field.

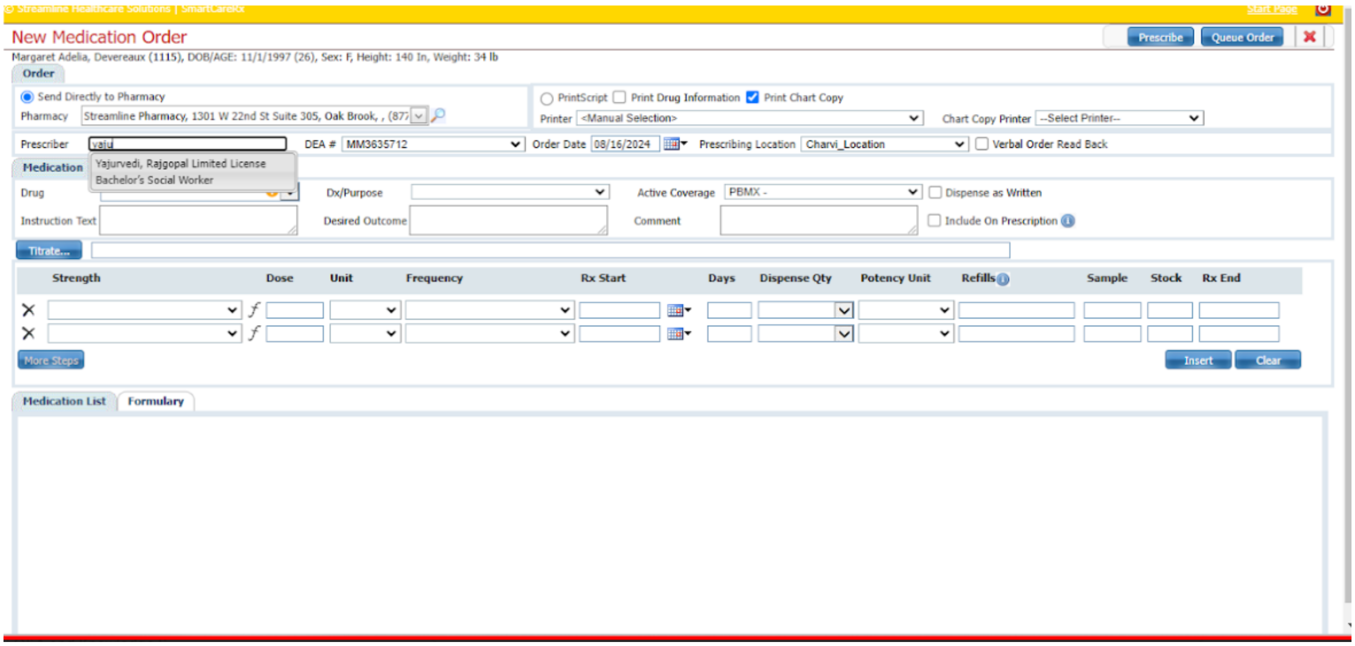
Functionality 'Before' and 'After' release:

Purpose: The Prescriber/Staff dropdowns were not responsive enough when there were large number of Prescriber records in the environment. So the Prescriber drop-downs are modified to type-able search text boxes to improve the system performance.

Before this release, here was the behavior. The names of the staff were listed in a dropdown menu under the Order section of the Rx Application's 'New Medication', 'Re-Order Medication' and 'Change Medication Order' page.

With this release, the Rx application's logic has been updated/modified. The Prescriber fields on the 'New Medication', 'Re-Order Medication' and 'Change Medication Order' page will now be displayed as type-able search textboxes when the System Configuration Key "DisplayStaffAsTypeableSearchTextBox" is set to "Yes."

Screen shot for **New Order:**



Author: Manjunath Malipati

132. EII # 126812: Rx Application – On clicking the 'INSPECT (PMP)' button, the user gets an Error Message in multiple Message tags.

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

Prerequisite:

1. The system configuration Key 'DISPLAYPMPBUTTONINRX' value is set to be 'Yes'.
2. The Configuration for the 'Appriss' is done in the 'PMPWebserviceconfigurations' table.

Navigation Path: Login to 'Rx' Application – 'Start page' – Click on 'Patient Search' Button – Perform 'Patient Search' and select a 'Client' – 'Patient Summary' Screen – click on 'INSPECT (PMP)' Button.

Functionality 'Before' and 'After' Release:

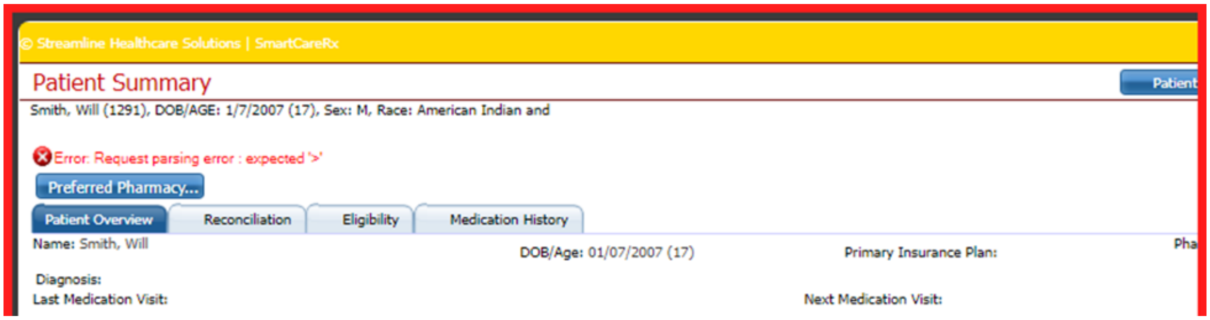
Purpose: To implement the PMP Gateway v5.1 Error responses for Appriss to display the error messages when the user clicks on the 'INSPECT (PMP)' button.

Before this release, here was the behavior. When the user clicked on the 'INSPECT (PMP)' button, the user received an Error Message in multiple Message tags as the system didn't support PMP Gateway v5.1 Error responses for Appriss.

With this Release, the PMP Gateway v5.1 Error responses is implemented for Appriss. When the user clicks on the 'INSPECT (PMP button, if there are any errors in Getting the NaRx Report)', the below correct Error messages are displayed.

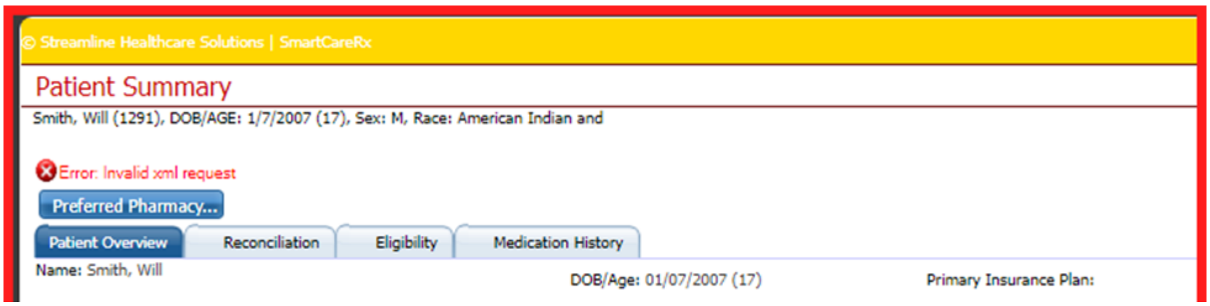
1. When the XML is Badly formed, the following error message is displayed.

Error Message: "Request parsing error: expected '>' "



2. When the Invalid XML request is sent, the following error message is displayed.

Error Message: "Invalid xml request'



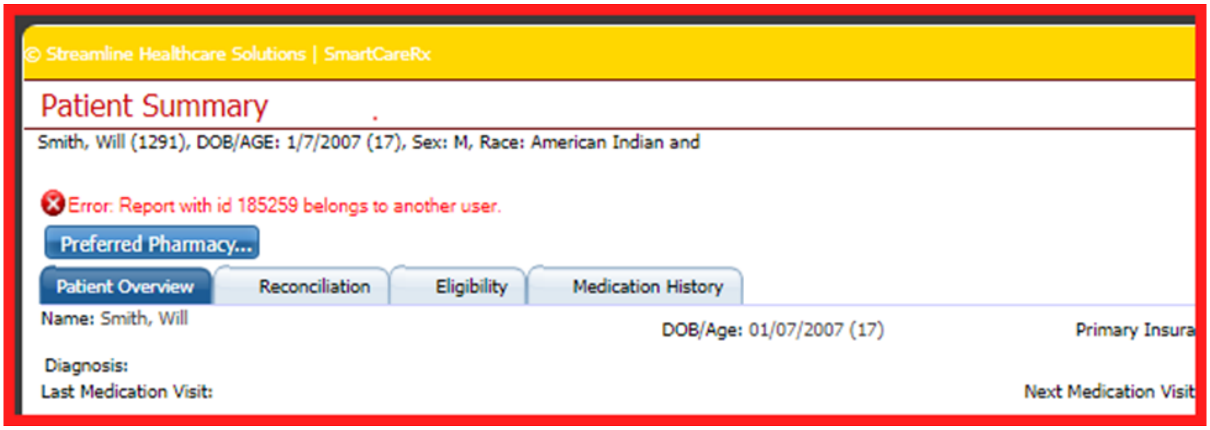
3. When the 'Invalid XML' is sent, the following error message is displayed.

Error Message: "Invalid xml sent"

4. When the Report requested is requesting a report created by a different licensee, the following error message is displayed.

Error Message: "Report with id XXXXX belongs to another user."

Note: Here XXXXX indicates Numbers

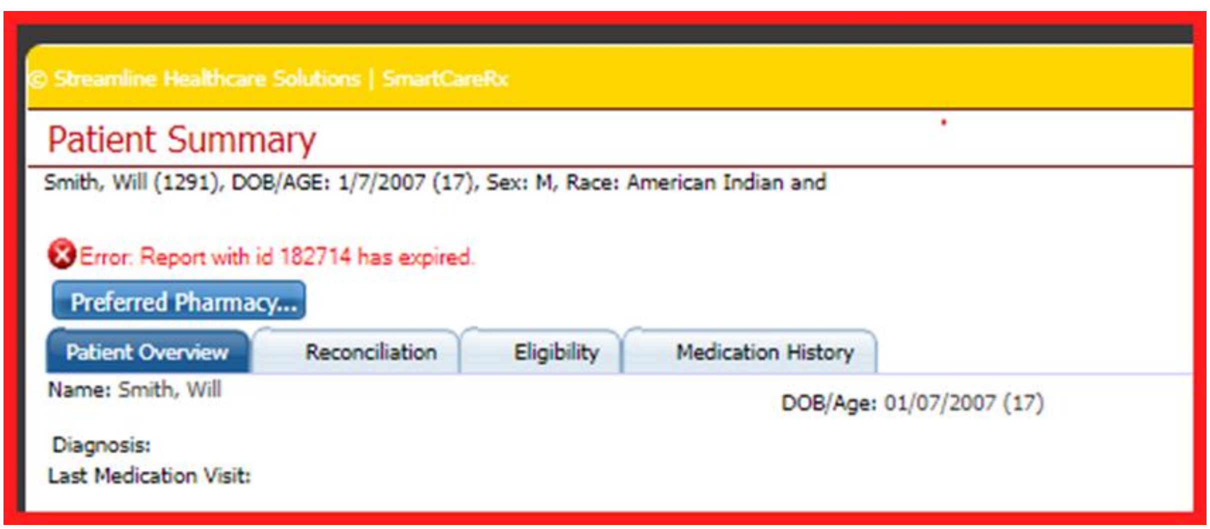


5. When no report requested exists for that URL, the following error message is displayed.

Error Message: "Report with id [XXXXXX] not found."

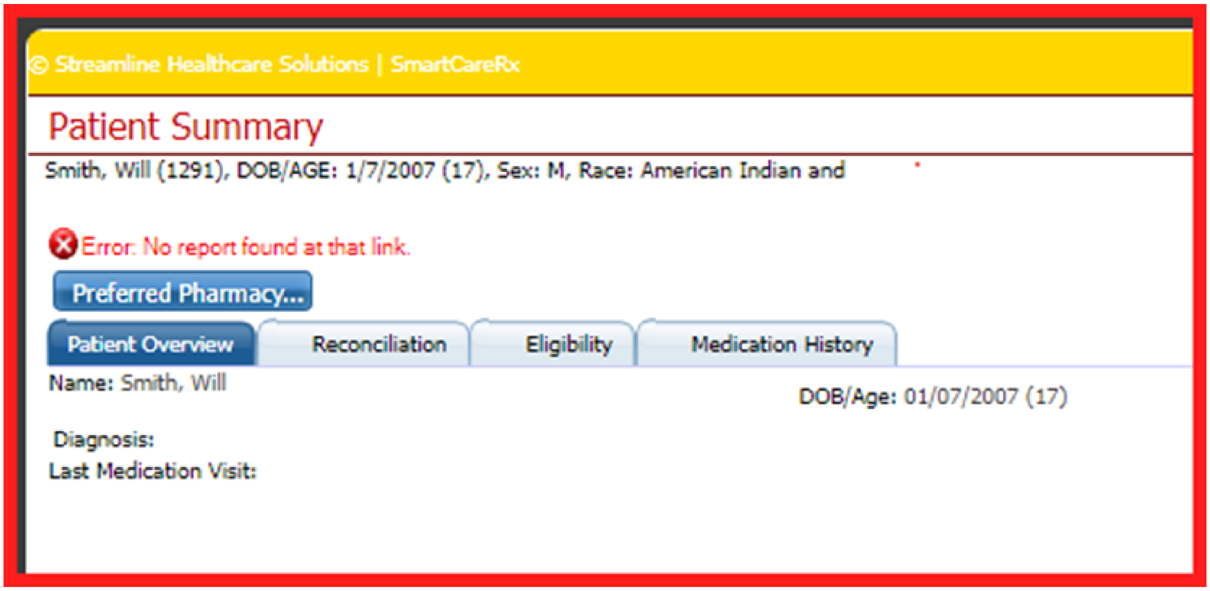
6. When the Report Request URL has expired, the following error message is displayed.

Error Message: "Report with is XXXXXX has expired."



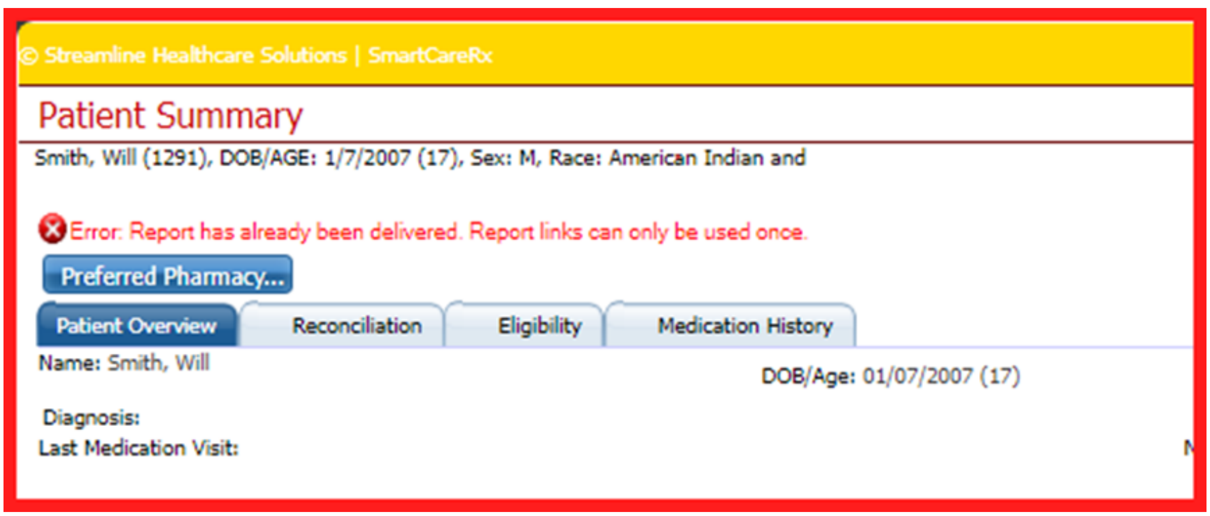
7. When the report is not available, the following error message is displayed.

Error Message: "No report found at that link."



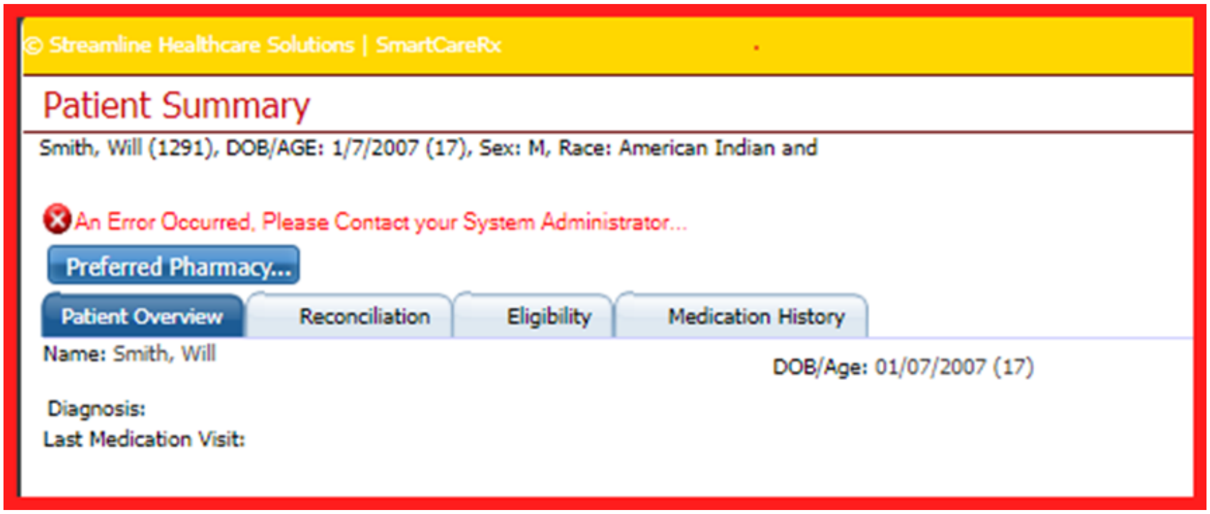
8. The following error message is displayed When the Report is already delivered, and the same report link gets requested again.

Error Message: "Report has already been delivered. Report links can only be used once."



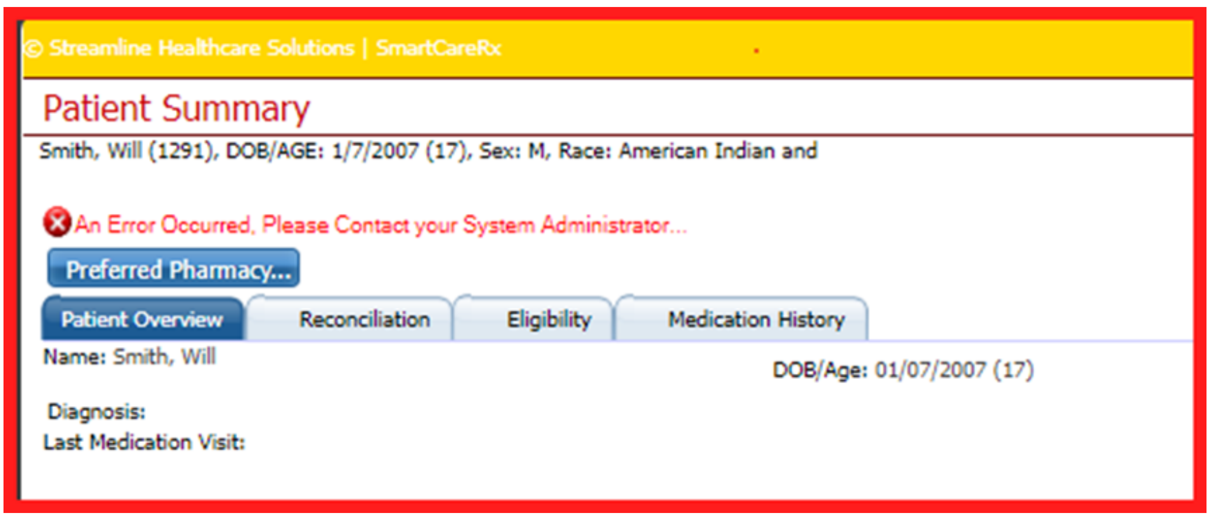
9. When there is Internal Server Errors i.e., Like (Server error. "Something went wrong" HTML. etc), the following error message is displayed.

Error Message: "An error Occurred, Please Contact your System Administrator…"



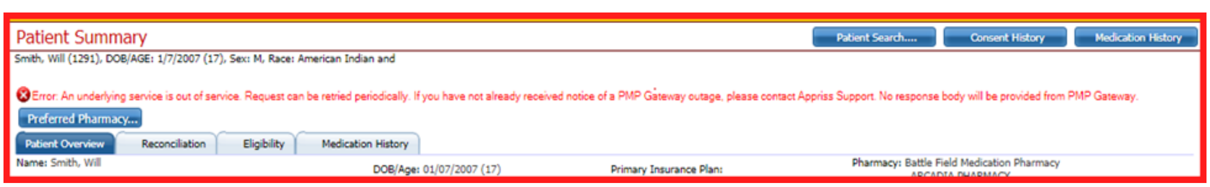
10. When Servers are under heavy load & the Request cannot be processed. The request will be retried immediately, the following error message is displayed.

Error Message: "An Error Occurred, Please Contact your System Administrator…"



11. The following error message is displayed When there is a time-out in the PMP Gateway.

Error Message: "An underlying service is out of service Request can be retried periodically. If you have not already received notice of a PMP Gateway outage, please contact Appriss support. No response body will be provided from PMP Gateway."



Author: Rajgopal Yajurvedi

133. Core Bugs # 128718: Issues with Allowing Special Characters in Client’s First or Last Name.

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

Prerequisite: Patient has a special character in first/last name via the below **path**:
Login to SmartCare Application - ‘Client’ – Client Information – First Name – Last name.

Navigation Path: Login to SmartCare Application – ‘Client’ – ‘Medication Management (Rx)’ link – Rx Application – Patient Summary page – New Order / Re-Order / Change Order.

Functionality ‘Before’ and ‘After’ release:

Before this release, here was behavior. The Prescribers were being logged out of the Rx Application in the middle of prescribing medication when patients had unique/special characters in their First or Last Name.

With this release, the above-mentioned issue is resolved. Now, while writing a prescription, prescribers will not be logged out of the Rx Application if a patient's first or last name contains a unique/special character.

Services

Reference No	Task No	Description
134	Core Bugs # 128563	Individual services are changing the 'Start Time' on clicking the 'Save' button.
135	Core Bugs # 128479	Service Detail – The ‘Clinician’ dropdown field displays all the ‘Clinician Names’ for those who don’t have an ‘Active License/Degree’.
136	Core Bugs # 128582	The duration of the manually added add-on codes are automatically changed to the main service duration upon scheduling or completion.
137	Core Bugs # 128476	Copy/Move/Error of claimed service did not automatically mark the charge as errored.
138	Core Bugs # 128725	Service Detail: The end date field is not calculated based on the Procedure codes entered as values.

Author: Niroop Hassan

134. Core Bugs # 128563: Individual services are changing the 'Start Time' on clicking the 'Save' button.

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

Navigation Path: ‘Client’ – ‘Services’ – ‘Services’ list page – ‘Click on the ‘New’ icon – ‘Service Details’ page – Select the required fields and click on the ‘Save’ icon.

Functionality ‘Before’ and ‘After’ Release:

Before this release, when the user clicked on the ‘Save’ icon in the ‘Service Details’ screen, the ‘Start Time’ defaulted back to the current time.

With this release, the above-mentioned issue has been resolved. Now, the 'Start Time' remains unchanged when the user clicks on the 'Save' icon in the 'Service Details 'screen.

Author: Suganya Sivakumar

135. Core Bugs # 128479: Service Detail – The 'Clinician' dropdown field displays all the 'Clinician Names' for those who don't have an 'Active License/Degree'.

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

Prerequisite: Logged In staff has active licenses/degrees.

Navigation Path: 'Client' search --- Select s 'Client' --- Navigate to 'Services' --- 'Client' --- Click on 'New' Icon --- 'Service Detail' Page --- Enter all the required fields --- Select the Procedure and 'Location --- Verify the 'Clinician' dropdown field --- Enter all the required field --- click on 'Save' icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Service Detail' screen, the 'Clinician' dropdown field displayed all the 'Clinician Names' for those who didn't have an 'Active License/Degree'.

With this release, the above-mentioned issue has been fixed. Now, only the names of 'Clinicians' with active licenses/degrees are displayed in the 'Clinician' dropdown field of the 'Service Detail' screen.

Author: Yashas Kydalappa

136. Core Bugs # 128582: The duration of the manually added add-on codes are automatically changed to the main service duration upon scheduling or completion.

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

Navigation Path: 'My Office' – 'Services' – 'Services' list page – Select the service – 'Service Details' screen – 'Add on codes' tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The manually added add-on codes duration was automatically changed to the main service duration upon scheduling or completion.

After this release, the issue mentioned above is fixed. The duration of the manually added automatic add-on codes will now remain unchanged, even if the main service duration is different.

Author: Suganya Sivakumar

137. Core Bugs # 128476: Copy/Move/Error of claimed service did not automatically mark the charge as errored.

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

Navigation Path 1: Client -- Services -- Click on New icon -- Service Detail Page -- Select the Program, Procedure, and Location -- Enter all the required fields – Select 'Show' in Status dropdown -- Click on Save icon.

Navigation Path 2: Client -- 'Services/Notes' -- 'Services/Notes' list page -- Select the Services/Notes (Created From Services from Navigation Path 1) -- Enter the required values -- Go to Note tab -- Enter the required values -- Sign the Service Note.

Navigation Path 3: Client -- Services -- select the services created from Navigation Path 1 -- Service Detail Page – Select 'Complete' in Status dropdown -- Click on Save icon -- Click on the 'Copy Service' icon – 'Service Detail' screen -- Change the Start Time -- Click on Save.

Navigation Path 4: Client -- 'Services/Notes' -- Select the Services/Notes (Created From Services from Navigation Path 3) -- Enter the required values --- Save the Services/Notes.

Navigation Path 5: Client -- Services --- Select the services created from Navigation Path 3 -- Click on 'Move Documents' icon -- Move Document Details Popup -- Select the services to be moved -- Once moved the service the original services should get Errored -- New service should display with Show status.

Navigation Path 6: My Office -- Charges/Claims -- Charges/claims list page -- select the appropriate filters and check whether the charges will be displayed in Unbilled charges.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user moved the Services, the previous (original Service) service was not displayed as errored, and the charges were also not displayed as errored in Charges/Claims screen.

With this release, the above-mentioned issue has been fixed. Now, in the Charges/Claims screen, the charges are displayed as errored, and the previous (Original Services) service is also displayed as Errored when the user moves the services.

Author: Suganya Sivakumar

138. Core Bugs # 128725: Service Detail: The end date field is not calculated based on the Procedure codes entered as values.

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

Prerequisite: Procedure codes exist with 'Mg' value in the 'Entered as' field.

Navigation Path: Perform Client Search - Select Client -Select Services (Client)-Click on New Icon - Service Detail Page - Enter all the required fields -click on Save icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the procedure code value 'Mg' was selected in the entered as field, then in the Service Detail screen, it was calculated as 'minutes' in the End Date field.

With this release, the above-mentioned issue has been resolved. Now, the End date field in the service detail is calculated correctly, when the procedure code value 'Mg' was selected in the entered as field.

Services/Notes

Reference No	Task No	Description
139	Core Bugs # 128605	Popup message issue when creating Service Notes.
140	EII # 127198	Associate Documents added to Service Notes.
141	Core Bugs # 128583	Vitals information is not populating into Psychiatric Note.
142	Core Bugs # 128518	Diagnosis not pulling into Psych Notes with Signed Diagnosis Documents.
143	Core Bugs # 128669	Services/Notes: The 'Narrative' section with slightly longer data was displayed on the next page leaving the first page mostly blank on the PDF.
144	EII # 125457	Implementation of a 'School Liaison Contact Note' Service Note.
145	EII # 127560	Service Note: Added ''List of Services that can be added to use the Same Note' in the 'Other Services using the same Note' pop up.
146	EII # 126887	Service Note creation validation.
147	EII # 126305	Implemented a new logic for the 'Reviewed PMP Report' checkbox in the 'Medical Decision-Making' tab of 'Psychiatric Note'.

Author: Rakesh Nagangouda

139. Core Bugs # 128605: Popup message issue when creating Service Notes.

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

Navigation Path: Login -- 'Client Search -- Select a client -- 'Services/Notes' screen -- Click on the New button to create new Service Notes.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user tried to create a new Service notes by clicking on New button in 'Services/Notes' screen, the "SetAutoSaveInformation()" popup was being displayed.

With this release, the above-mentioned issues have been resolved. Now popup is not displaying while creating the new Service Notes.

Author: Suganya Sivakumar

140. EII # 127198: Associate Documents added to Service Notes.

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

Prerequisite:

1. Add the document name under the Associated Documents tab in the Procedure Code details screen through the **path:**

Administration --- Procedure/Rates --- Click on New Icon --- Procedure Code Details Screen --- Enter all the required fields --- Navigate to Associated Documents tab --- Add documents in Associated Document section --- Click on Save.

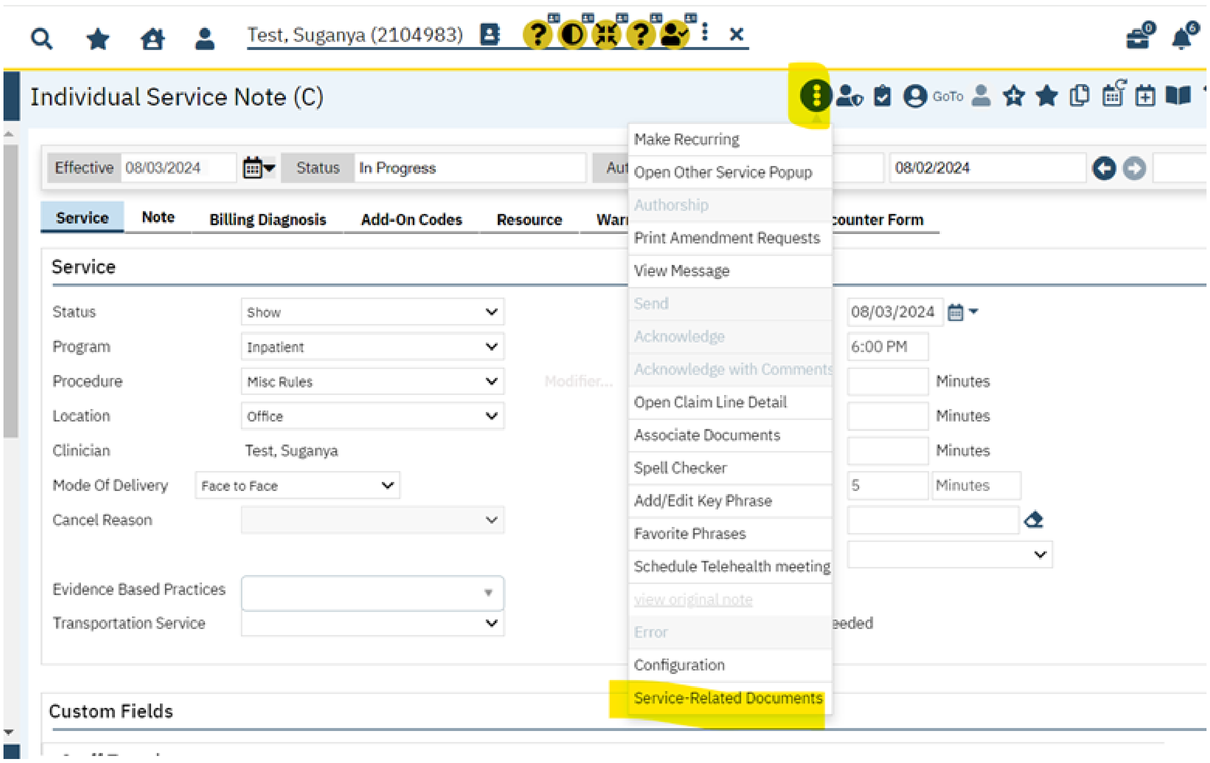
2. Create a Service/Note with a Procedure with the associated document code setup.

Navigation Path: Perform Client Search --- Select Client --- Navigate to Services/Notes --- Client --- Click on New Icon --- Service/Note Detail Page --- Select the Procedure which has Associated documents set up --- Enter all required fields --- Click on Save Icon --- Sign the service note.

Functionality 'Before' and 'After' release:

Purpose: The Organization Boards, Grants and other State items require some documents to be completed at time of Service. So, implementing a feature where Staff can indicate required documents for specific procedure/Services. The ability to view the associated documents in the Service note will remind Clinician to complete it and they can easily access the document without navigating to other screens. This could enhance efficiency and ensure comprehensive documentation for Clients.

With this release, a new Action "Service-Related Documents" popup has been added to the Select Action dropdown list in the Service Notes.



Service-Related Documents:

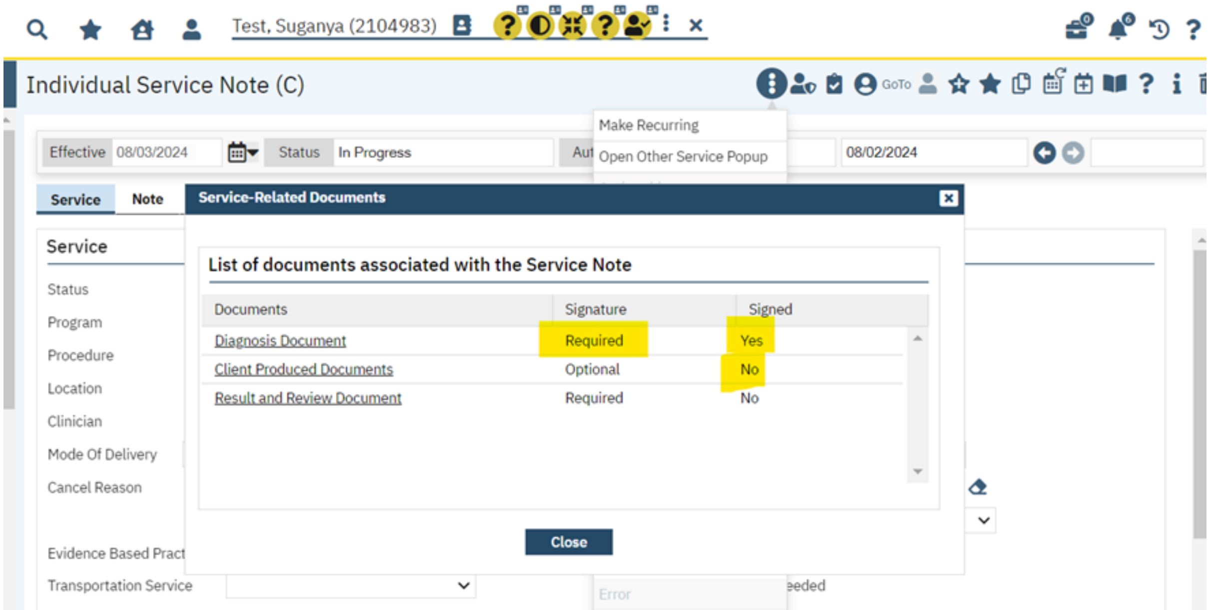
1. When Service-Related Documents have been selected List of documents associated with the

Service Note popup displays with three columns - Documents, Signature, and Signed.

2. The document name will be a hyperlink to the respective document.

i) If the document is marked as Required for Signature in the Procedure code setup, then the Signature column will be marked as "Required" in the grid, and for others, it will be marked as "optional".

ii) If the documents are signed on the same day i.e., effective date = DOS, then the Signed column will be marked as "Yes" in the grid and if the date is not as same as DOS it will be marked as "No".



3. If the Client has a signed document for the selected document code, it will open the PDF of that document. If the Client has an in-progress document for the selected document code, it will open the in-progress version.

Validation Message will display when the Signed documents for the associated document of the selected procedure code documents with an Effective Date = Date of Service, is not completed before signing the Service Note.

Validation Message - "Required documents are missing. The list of documents can be accessed using the Service-Related Documents tool".

Author: Sunita Biradar

141. Core Bugs # 128583: Vitals information is not populating into Psychiatric Note.

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

Prerequisites: Flowsheet is created with required data for the selected Client.

Navigation Path: Open a Client - Go to the 'Services/Notes' – Create a new Services/Notes by Selecting the Procedure related to Psychiatric note – Enter all the required details in the 'Service' tab – Click on 'Note' tab – Enter all the tab details – MSE(Sub-tab) -Vitals - Click on Sign.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Psychiatric Note, the flowsheet information was not displayed in the Vital section of the MSE tab and also in the PDF of the Psychiatric Note.

With this release, the above-mentioned issue is resolved. Now, the Flow sheet information is displayed in the Vital section of the MSE tab under the Psychiatric note and also in the PDF of the Psychiatric Note.

Author: Nayvashree Jois

142. Core Bugs # 128518: Diagnosis not pulling into Psych Notes with Signed Diagnosis Documents.

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

Navigation Path 1: Login -- Select a client -- Search for 'Diagnosis Document' -- Add Diagnosis for the Client -- Sign the Diagnosis Document.

Navigation Path 2: Search for 'Services/Notes' -- New -- Select the Procedure associated with Psychiatric Note -- Enter the required values -- Go to Note tab -- Enter the required values -- Go to Diagnosis sub-tab -- Check if the diagnosis codes are initialized from the latest signed 'Diagnosis Document' - Sign the Service Note.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to sign a 'Psychiatric Note', the diagnosis was not pulled from the signed 'Diagnosis document' into the 'Diagnosis' sub-tab under the Note tab.

With this release, the above-mentioned issue is resolved. Now, the diagnosis codes are getting initialized into the 'Diagnosis' sub-tab of 'Psychiatric Note' from the latest signed 'Diagnosis Document'.

Author: Nayvashree Jois

143. Core Bugs # 128669: Services/Notes: The 'Narrative' section with slightly longer data was displayed on the next page leaving the first page mostly blank on the PDF.

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

Navigation Path: Client -- 'Services/Notes' – Click on New – Service Note -- Select the Procedure related to Miscellaneous Note -- Enter all the required details in the 'Service' tab -- Click on the 'Note' tab -- Enter little longer note in Narrative Section -- Click on 'Sign' button -- Check the PDF.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user signed a 'Miscellaneous' Note, the 'Narrative' section with slightly longer data was displayed on the next page, leaving the first page mostly blank on the signed PDF.

With this release, the above-mentioned issue has been resolved. Now, the 'Narrative' section with slightly longer data, starts right after the service information on the same page of the signed 'Miscellaneous' PDF.

Author: Kiran Yogendra

144. EII # 125457: Implementation of a 'School Liaison Contact Note' Service Note.

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

Prerequisite: Create a Procedure and associate it with 'School Liaison Contact Note'.

Navigation Path 1: Client -- Services/Notes -- Click on New icon -- Select the above Procedure associated with 'School Liaison Contact Note' -- Enter all the required values in the Service tab – Click on Save -- Navigate to ‘Note’ tab -- Check if all the sections with required fields are available -- Enter all the values -- Click on Save/Sign.

Navigation Path 2: Mobile Application URL – Click on the ‘Home’ icon – Click on the ‘Create Service’ icon – Select/Enter the required details - Select a Procedure associated with ‘School Liaison Contact Note’ Service Note – Enter all the required values in the Service Details section – Scroll down to ‘Note’ section – Check if all the sections with required fields are available – Enter all the values – Save/Sign/Client Sign.

Functionality ‘Before’ and ‘After’ Release:

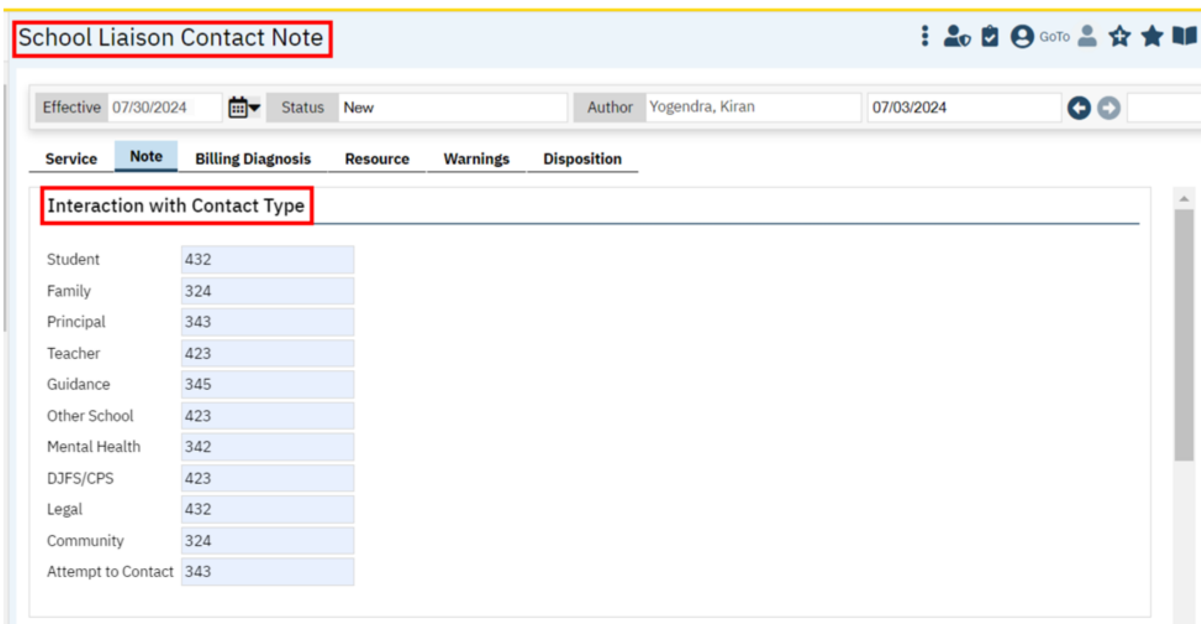
Purpose: To track the number of interactions with each contact listed.

With this release, a new Service Note named ‘School Liaison Contact Note’ has been implemented for Web and Mobile applications.

The ‘Note’ tab of the ‘School Liaison Contact Note’ contains the below mentioned sections:

- Interaction with Contact Type
- Progress Note
- District

Web Application Screenshots:

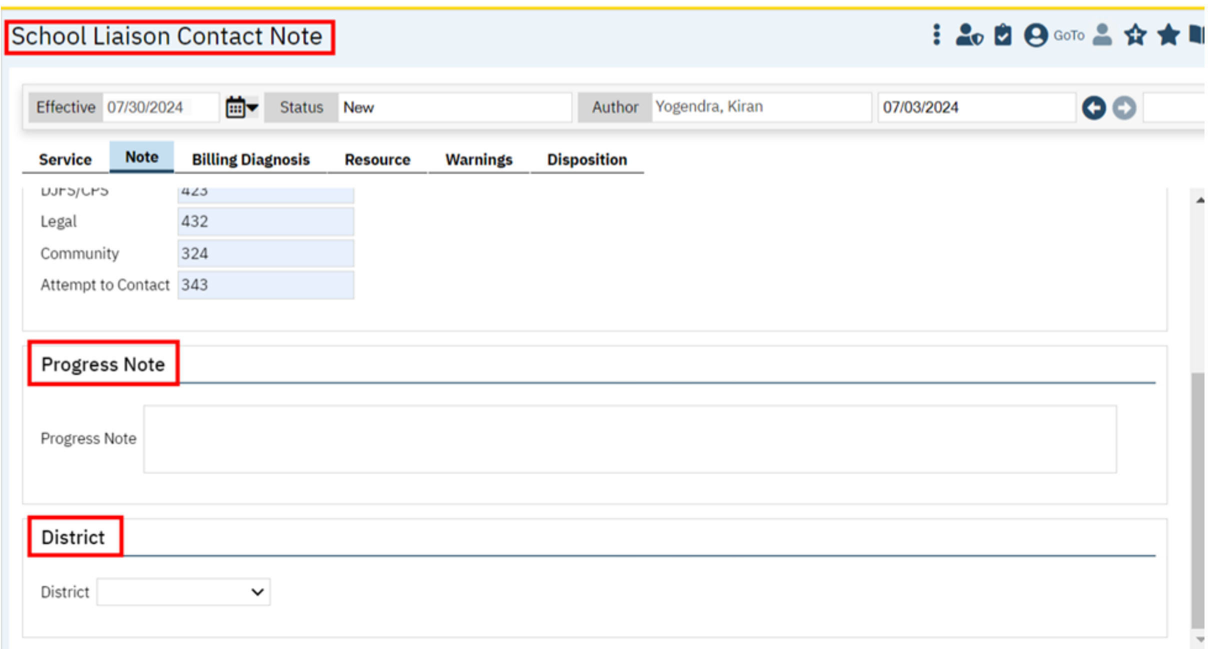


Interaction with Contact Type: This section contains the following text box fields and it accepts a maximum of three integer digits.

- Student
- Family
- Principal

- Teacher
- Guidance
- Other School
- Mental Health
- DJFS/CPS
- Legal
- Community
- Attempt to Contact

'Progress Note' and 'District' sections of the 'School Liaison Contact Note':



Progress Note: This is a text area.

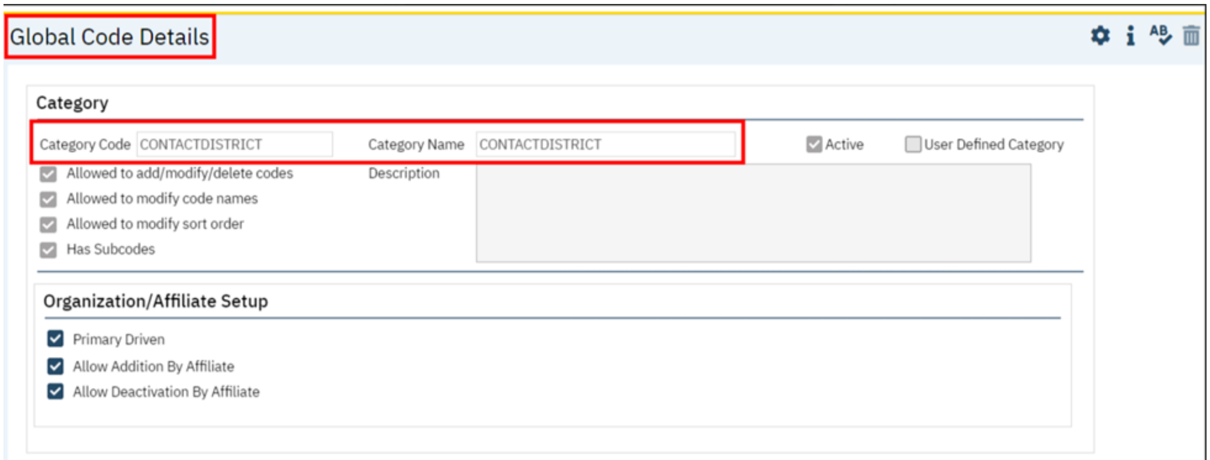
District: It is a Dropdown and pulls the dropdown values from the Global code category CONTACTDISTRICT.

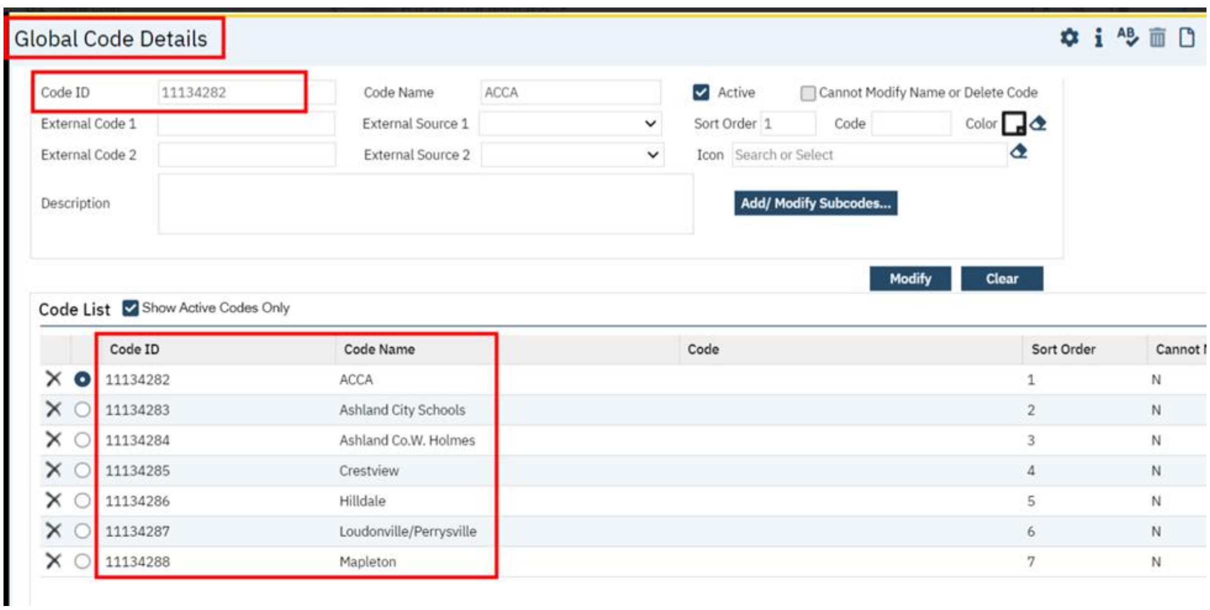
Global Code Details:

Global Code Category Name: CONTACTDISTRICT

- In the Global Code, the values are added though the following **path:**

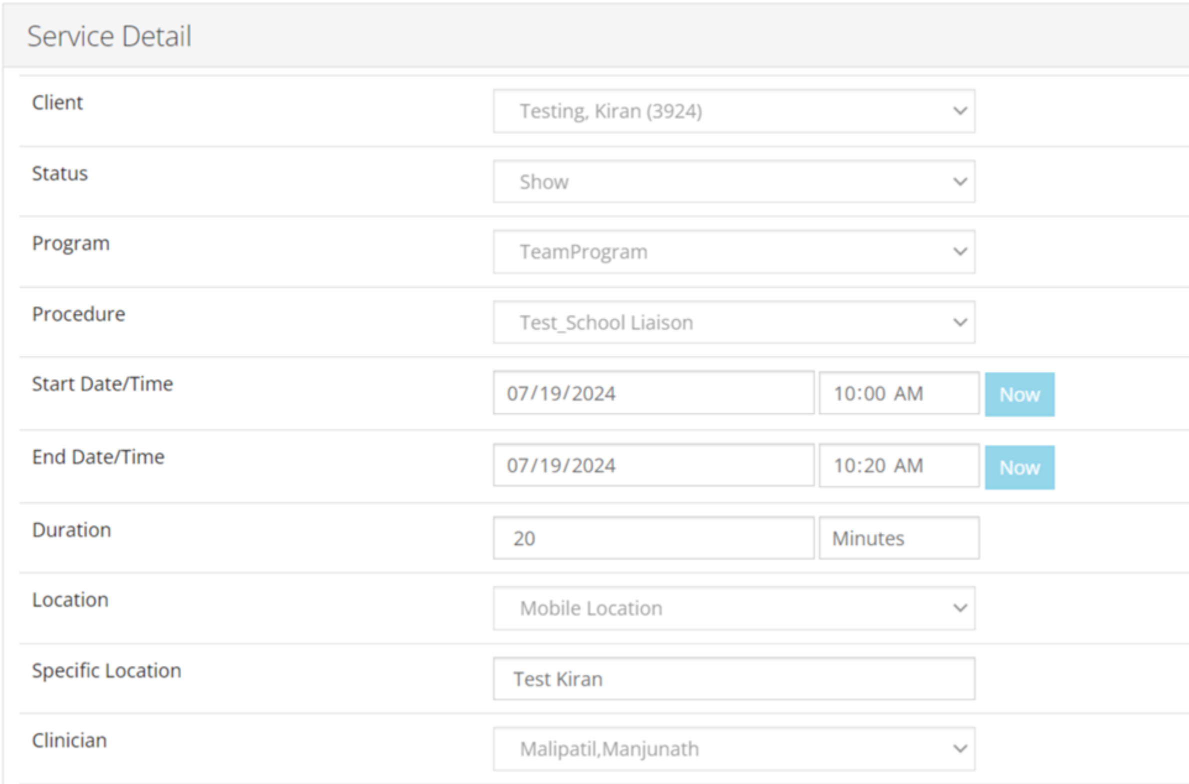
Administration -- Global Codes -- Global Codes List page -- Click on New Icon -- Global Code Details page -- In Code Details section -- Add Code Name and Code ID -- Insert in the Code List section -- Click on Save Icon.



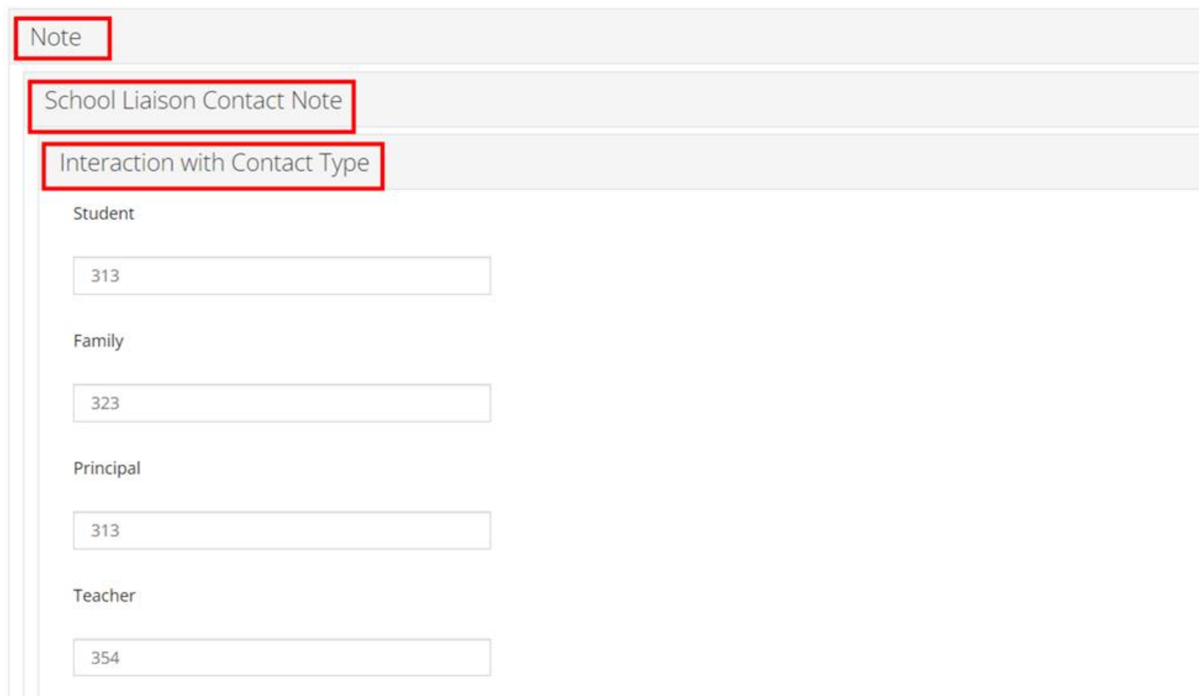


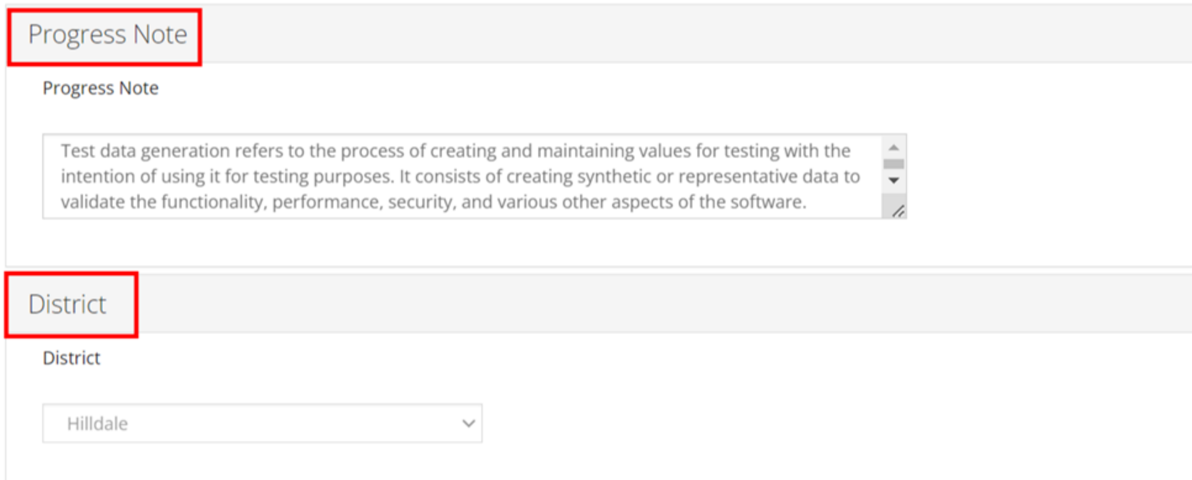
Mobile Application Screenshots:

The 'Service Detail' section on the Mobile design



The 'Interaction with Contact Type', 'Progress Note', and 'District' sections on the mobile application.





Data Model Changes: Added a new 'DocumentSchoolLiaisonContactNotes' table.

Author: Aishwarya Bommaklar

145. EII # 127560: Service Note: Added ''List of Services that can be added to use the Same Note' in the 'Other Services using the same Note' pop up.

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

Prerequisite: In the procedure code details screen, 'Allow using Note from a different Service' check box is to be selected.

Navigation Path 1: Client -- Services/Notes -- Click on New -- 'Service Note' detail Page -- Enter all the fields -- Click on Note tab -- Enter the Note contents -- Click on Save icon -- Click on 3 dots icon in toolbar -- Select 'Open Other Service Pop up' – 'Other Services using the same Note' pop up will be displayed.

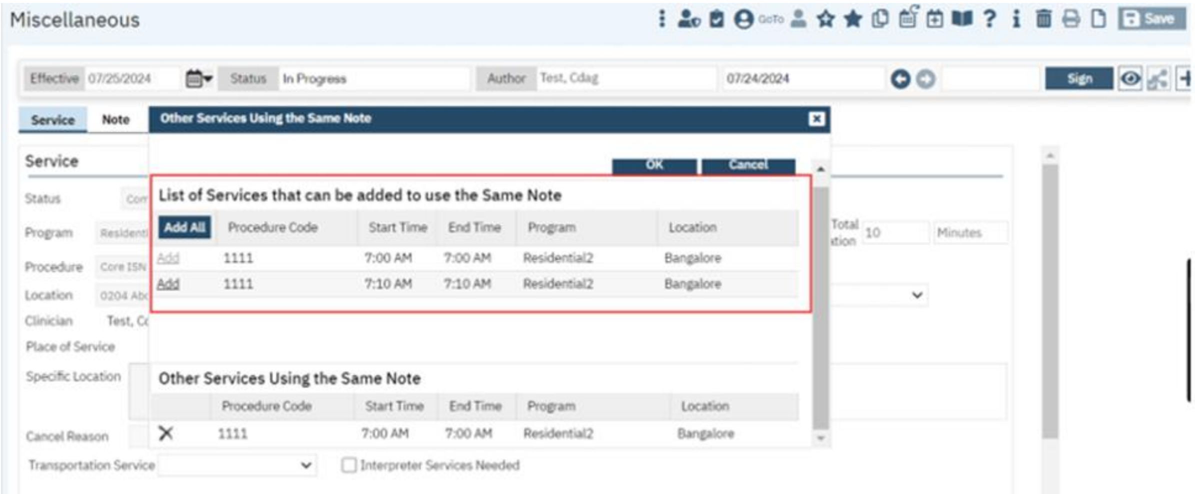
Navigation Path 2: Client – Services - Click on New -- Service Detail Page -- Enter all the fields -- Select Procedure Code marked as 'Allow using Note from a different Service' -- Click on Save icon.

Functionality 'Before' and 'After' release:

Purpose: Ability to link multiple Services to a Service Note so that all the linked services use the Note from the main Service Note.

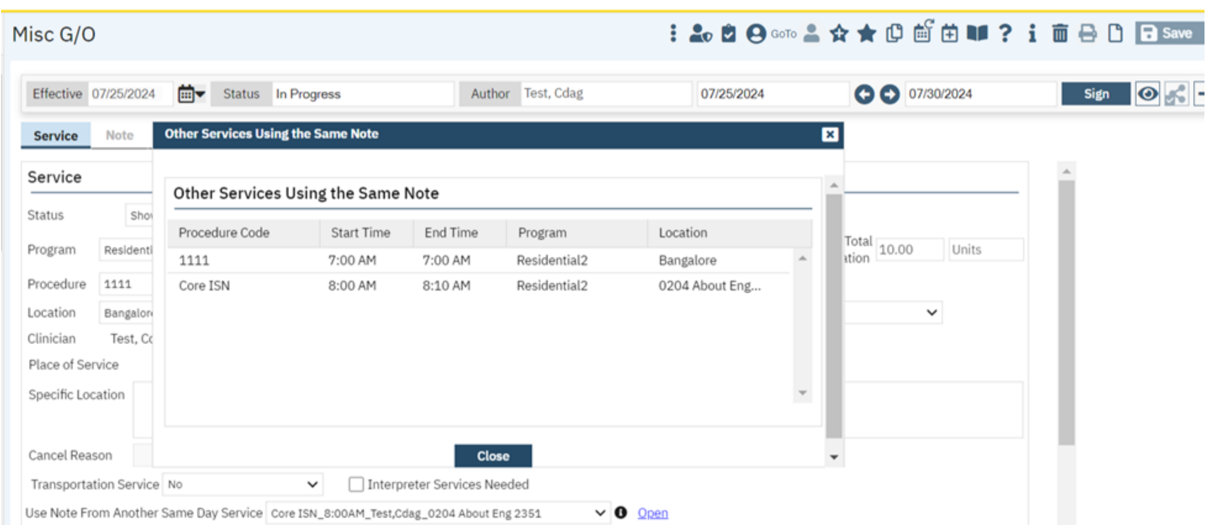
With this release, a new section called 'List of Services that can be added to use the Same Note' has been implemented in the 'Other Services using the same Note' pop up above the 'Other Services using the same Note' section. This section will display all the services created on the same day which are marked as 'Allow using Note from a different Service'.

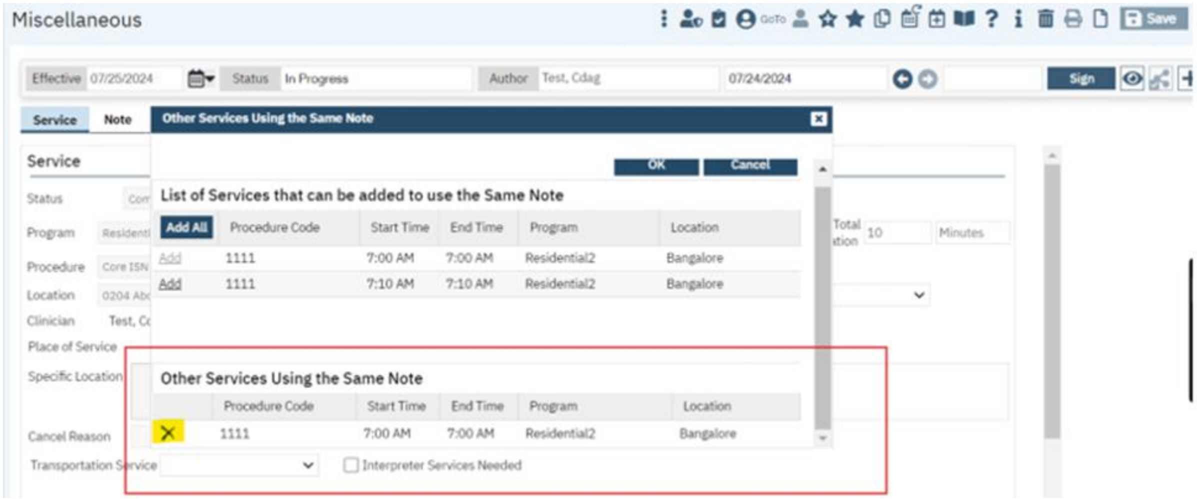
'List of Services that can be added to use the Same Note' section has the following columns:



- **Add All:** this is a button, on click of this button, all the services displayed under this section will be added to the below grid 'Other Services using the same Note'. This is used to link multiple child services marked as Allow using Note from a different Service and the main service acts as parent service. This column displays the child services with individual Add hyperlink which can be used to add one single service as a Child service. Once the Add link is clicked for each individual service, the link will be disabled.
- **Procedure code:** Displays the Procedure name of the Child Services
- **Start Time:** Displays the Start Time of the Child Services
- **End Time:** Displays the End Time of the Child Services
- **Program:** Displays the Program name of the Child Services
- **Location:** Displays the Location name of the Child Services

'Other Services using the same Note' section:





Delete icon: Delete icon is implemented in the existing section 'Other Services using the same Note', for each service entry enabling the user to delete the service, which will remove the linking of child service to parent service. When the user deletes the child service from the section 'Other Services using the same Note', a confirmation pop up will be displayed with below message

Do you want to delete this record? With 'Ok' and 'Cancel' options.

- When user clicks on 'OK', the Service will be deleted and when user clicks on Cancel the Confirmation pop up will be closed.
- Once the child service is deleted, the Add link for that service will be again enabled in the 'List of Services that can be added to use the Same Note' section so that users can again add it as a child whenever they want.
- In the Signed Service Note pdf of the parent Service, the 'List of Services that can be added to use the Same Note' section will be displayed.
- When the user opens the Child Service Note, the Note tab will be disabled (as it's using the Note from another parent Service).

Author: Niroop Hassan

146. EII # 126887: Service Note creation validation.

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

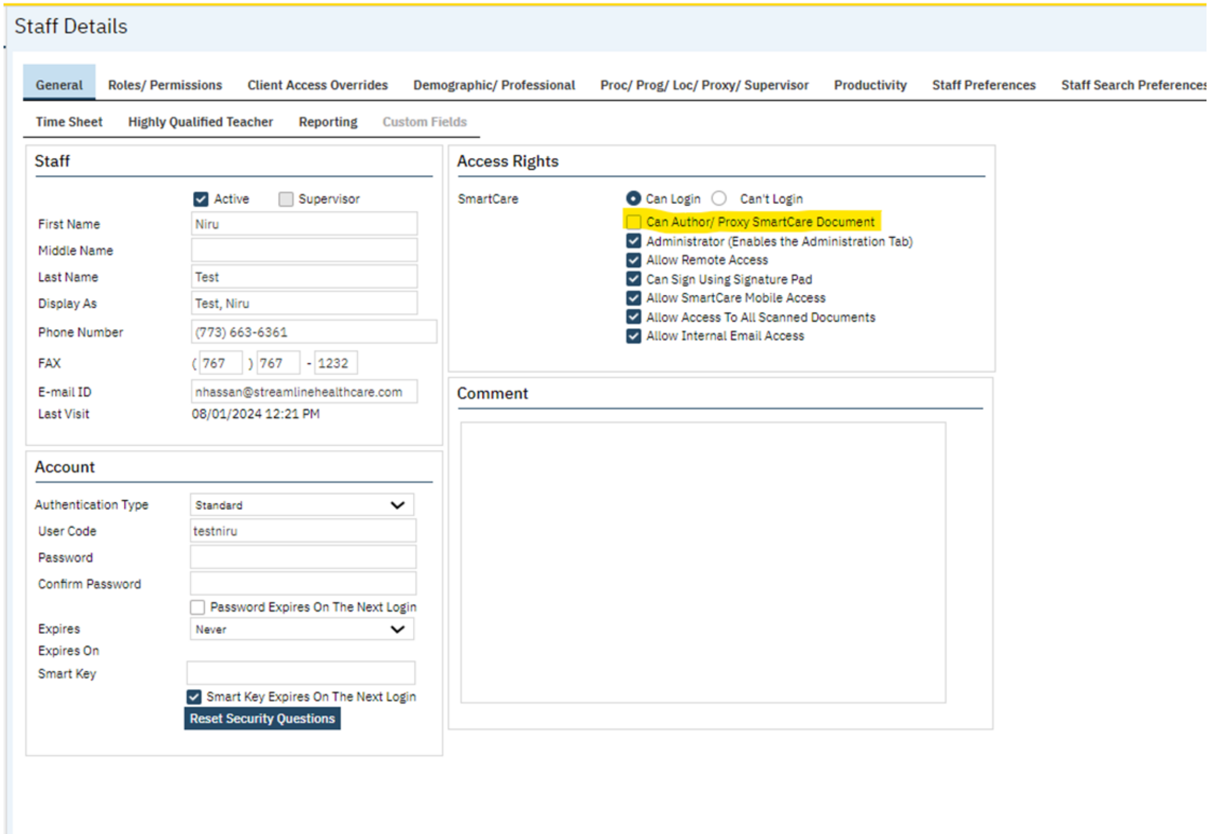
Navigation Path 1: 'Administration' – 'Staff/Users' - 'Staff/Users' list page – Click on required staff name hyperlink – 'Staff Details' page – 'General' tab – 'Access Rights' section – Uncheck 'Can Author/ Proxy SmartCare Document' checkbox option and click on 'Save' icon.

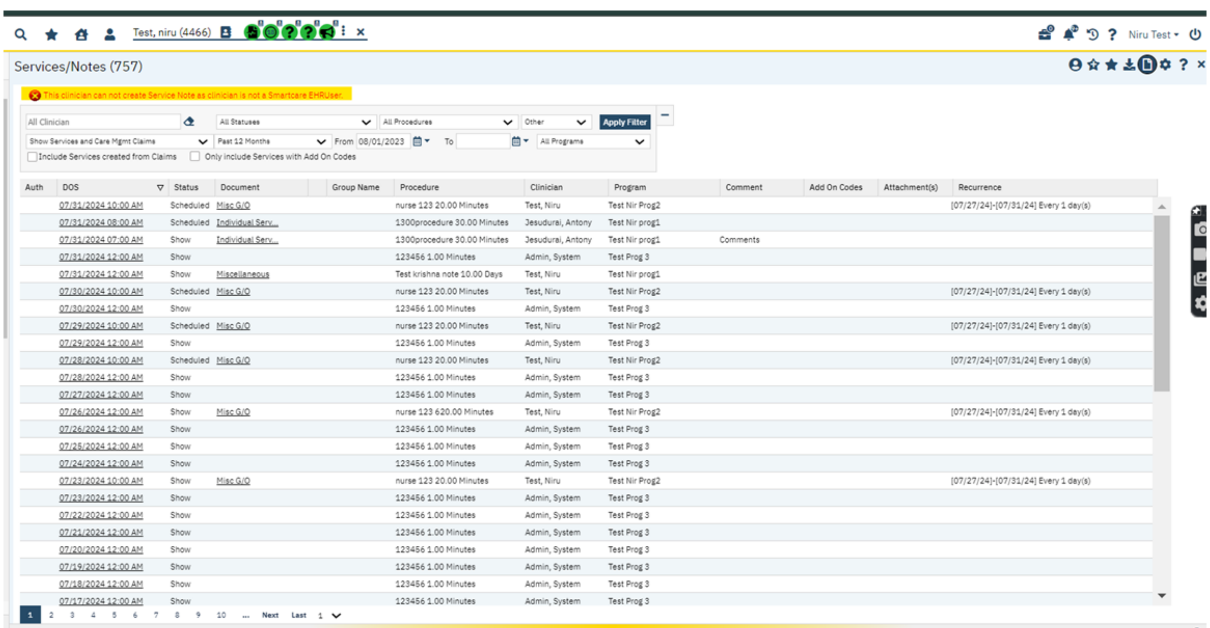
Navigation Path 2: 'Client' – 'Services/Notes' – 'Services'/Notes list page – 'Click on 'New' icon.

Functionality 'Before' and 'After' Release:

With this release, if staff members do not have the 'Can Author/Proxy SmartCare Documents' checkbox checked in the Staff Details screen, they will be denied the ability to create a Service Note from the 'Services/Note' screen. Clicking the 'New' icon on the 'Services/Notes' list page will display the following error message.

Error message: 'This clinician cannot create Service Note as clinician is not a Smartcare EHRUser.'





Author: Manjunath Malipatil

147. EII # 126305: Implemented a new logic for the 'Reviewed PMP Report' checkbox in the 'Medical Decision-Making' tab of 'Psychiatric Note'.

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

Navigation Path 1: Login to 'RX' Application – In 'Start Page' – click on 'Patient' Search – Perform 'Patient' Search – Select a 'Patient' – 'Patient Summary' Screen – Click on 'PMP' Button.

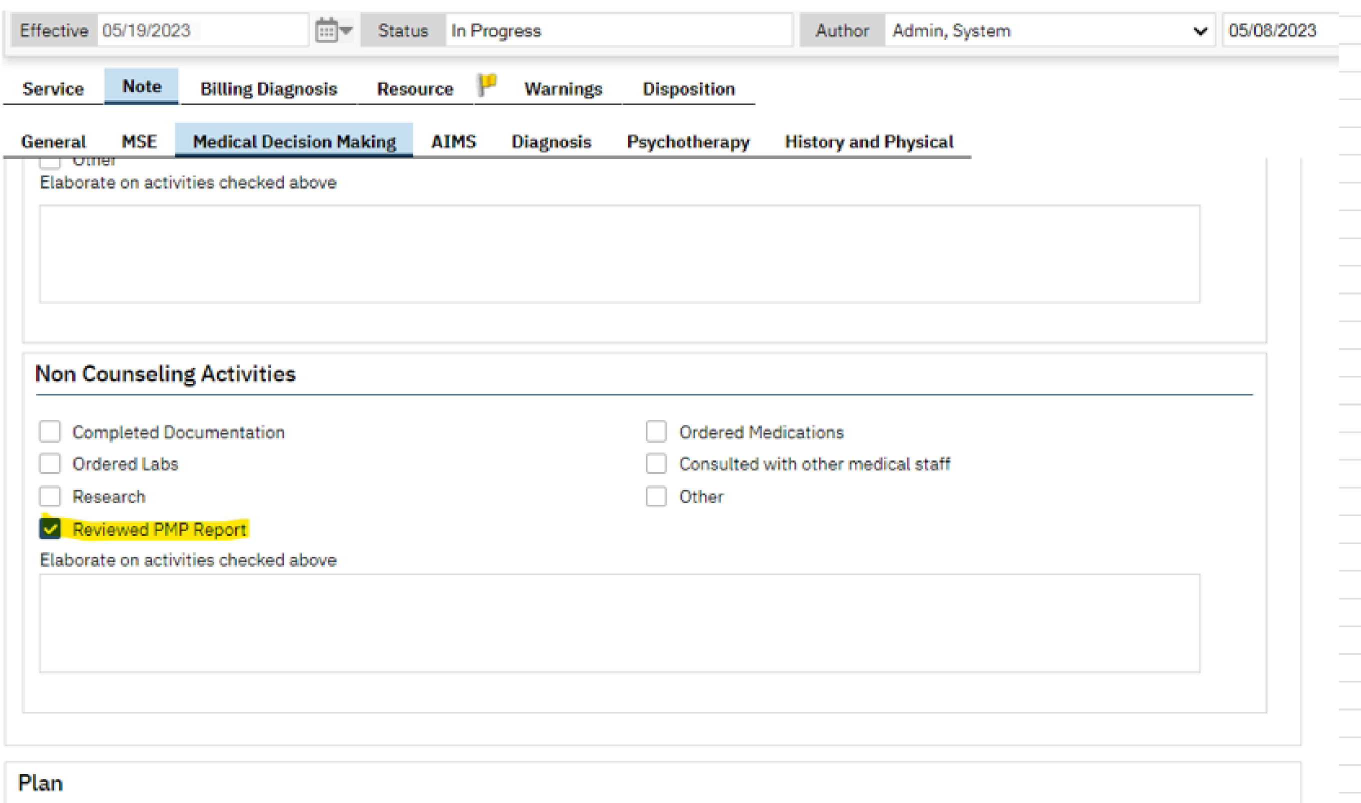
Navigation Path 2: Login to 'SmartCare' Application – Select a 'Client' – 'Services/Notes' list page -- Click on 'New' icon – In the 'Service Note Details' screen – enter all the required fields – Select a procedure Which is associated with 'Psychiatric Note'—Click on 'Note' tab - 'Medical Decision-Making' tab -- 'Non-Counselling Activities' section -- 'Reviewed PMP Report' checkbox – Sign the note.

Functionality 'Before' and 'After' release:

Purpose: The author of the Psychiatric Note should know whether the client's PMP is reviewed or not, on the same day when the note is being signed.

With this Release, a new logic initialization has been done for the 'Reviewed PMP Report' checkbox in the 'Medical Decision-Making' tab of the 'Psychiatric Note'.

1. When the user opens a new 'Psychiatric Note', if the 'INSPECT(PMP)' button in the 'SmartCare' Rx is clicked by the author of the note on the same date as the 'Date of Service', the 'Reviewed PMP Report' will be initialized, and the checkbox is checked.



2. If the 'INSPECT(PMP)' button in the 'SmartCare Rx' is not clicked on the same date as the 'Date of Service (or Current Date)', the checkbox will not be checked.
3. When a new 'Psychiatric Note' is opened, if the INSPECT(PMP) button is clicked by any staff other than the author, the Checkbox will not be checked.
4. If the INSPECT(PMP) button is not clicked in 'Rx', but the user has manually checked the checkbox, no validation message will be displayed upon signing the note.

SmartCare Improvements

Reference No	Task No	Description
148	Core Bugs # 128588	Performance issues in the Dashboard widgets.
149	Core Bugs # 128567	Go Search taking more time to load the data.
150	Core Bugs # 128611	Detail Pages: Previously created record is loading on refreshing the screen.
151	EII # 127536	To retrieve System Distributed cache cluster DataStore value instead of systemConfigurationKey table.
152	Core Bugs # 128572	When SmartView is open the User Menu index is not displayed properly.

Author: Niroop Hassan

148. Core Bugs # 128588: Performance issues in the Dashboard widgets.

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

Navigation Path: 'My Office' - 'Dashboard' - Documented Service Totals, Productivity of Supervisees, Supervisor Productivity widgets.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Dashboard, the below widgets were taking more time to load;
1. Documented Service Totals
2. Productivity of Supervisees
3. Supervisor Productivity

With this release, the above-mentioned issue has been resolved. Now, the code is optimized to improve the performance of below widgets and all the widgets are loading fine without any issues.
1. Documented Service Total
2. Productivity of Supervisees
3. Supervisor Productivity.

Author: Sunil Belagali

149. Core Bugs # 128567: Go Search taking more time to load the data.

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

Navigation Path: Go Search -- Type for the Screen to search.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. 'Go Search' was taking long time to load the data.

With this release, the issue has been fixed. Now, when the user searches the Screens in 'Go Search', the data loads fine without any performance issue.

Data Model Changes: Added index for 'StaffScreenFilterFavorites' table.

Author: Kiran Tigarimath

150. Core Bugs # 128611: Detail Pages: Previously created record is loading on refreshing the screen.

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

Navigation Path: 'Login' - 'Navigate to any detail page'.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. In any of the detail screen, when the user created new record and refreshed the detail screen, the previously created/saved record was getting loaded on top of the currently created/saved record in some detail pages like 'Class Room Assignment Detail Screen', 'School District Detail', 'Immunization Detail screen', 'Client Plans and Time span Screen', 'program Assignment details' and many more.

With this release, the above-mentioned issue is resolved. Now, the currently created/saved record is getting retained in the details screen after refreshing the screen.

Author: Kiran Tigarimath

151. EII # 127536: To retrieve System Distributed cache cluster DataStore value instead of systemConfigurationKey table.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

Purpose: To insert System Distributed cache clusters value to the DataStore.

With this release, a new table called 'SystemDistributedCacheClusters' is implemented for cache server to refer.

1. A new table called 'SystemDistributedCacheClusters' is added.
2. The table 'SystemDistributedCacheClusters' will be having three columns which represents as below,

2.1. 'DataStore' column which stores Datastore values such as InMemory or SQLServer or Redis.

2.2. 'DataStoreConnectionString' column which stores DataStoreConnectionString values of SQL Server or Redis connection string.

2.3. 'DefaultValue' column which stores default values 'Y' or 'N' of respective connection string.

3. Added new column called 'SystemDistributedCacheClusterId' as foreign key to 'WebFarmNodes' table which specify which cluster each node should use, if no values in WebFarmNodes, default to = Y row that is in 'SystemDistributedCacheClusters'. If no rows in 'SystemDistributedCacheClusters', then default will be InMemory.

Now onwards, the system will be referring the table 'SystemDistributedCacheClusters' for server cache instead of system configuration keys like 'SetCacheDataStore', 'SetCacheSqlConnectionString' and 'SetCacheRedisConnectionString' keys.

Data Model Changes:

Added new table SystemDistributedCacheClusters

Added new column 'SystemDistributedCacheClusterId' as foreign key to 'WebFarmNodes' table.

Author: Sunil Belagali

152. Core Bugs # 128572: When SmartView is open the User Menu index is not displayed properly.

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

Navigation Path 1: Client – Client Summary – click on SmartView – Do not close.

Navigation Path 2: Click on the User menu dropdown (Username).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user opened SmartView and clicked on the User Menu dropdown (username), the user menu index was not displaying properly. It was hiding behind the SmartView window.

With this release, the above-mentioned issue has been resolved. Now, the user menu index is displayed properly when the user opens SmartView and clicks on the User Menu dropdown (username).

SmartView

Reference No	Task No	Description
153	Core Bugs # 128664	The 'Current Balance' hyperlink in the 'Summary' widget of SmartView did not redirect users to the 'Client Account' screen when clicked.

Author: Sunil Belagali

153. Core Bugs # 128664: The 'Current Balance' hyperlink in the 'Summary' widget of SmartView did not redirect users to the 'Client Account' screen when clicked.

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

Navigation Path: Login to 'SmartCare application' – 'Client' search – Select a Client – 'SmartView' – 'Summary' widget - 'Current Balance' hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'SmartView', when the user clicked on the 'Current Balance' hyperlink in the 'Summary' widget, it was not redirected to the 'Client Account' screen.

With this release, the above-mentioned issue has been resolved. Now, when the user clicks on the 'Current Balance' hyperlink in the 'Summary' widget under 'SmartView', SmartCare will consistently redirect the users to the 'Client Account' screen.

Staff Calendar

Reference No	Task No	Description
154	EII # 127318	Added Program field in Staff Calendar and Appointment Search List Page.

Author: Suganya Sivakumar

154. EII # 127318: Added Program field in Staff Calendar and Appointment Search List Page.

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:** Medium

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: Administration -Global Codes -Global Codes List page - In the All Categories dropdown - search for Appointment Type category - Click on apply filter - Click on the hyperlink in Category column - Global code detail page - Select the Code ID and Code Name for the appointment type.

Navigation Path 2: Administration- Recodes- From the All Recodes Categories dropdown - search for SetAppointmentTypesToNotRequireProgram - Click on Apply filter - Click on the hyperlink in the Recode Category column - Add the Code ID and Code Name from Navigation path 1 - Click on Save.

Navigation Path 3: My Office - New Calendar Entry - Select the particular date -Click on the selected timing slot - New Entry type popup opens- Select New Calendar Entry Radio button - Click on OK button - In Scheduler Event popup - Enter all the required fields - Select Program from the program dropdown - Click on Ok button.

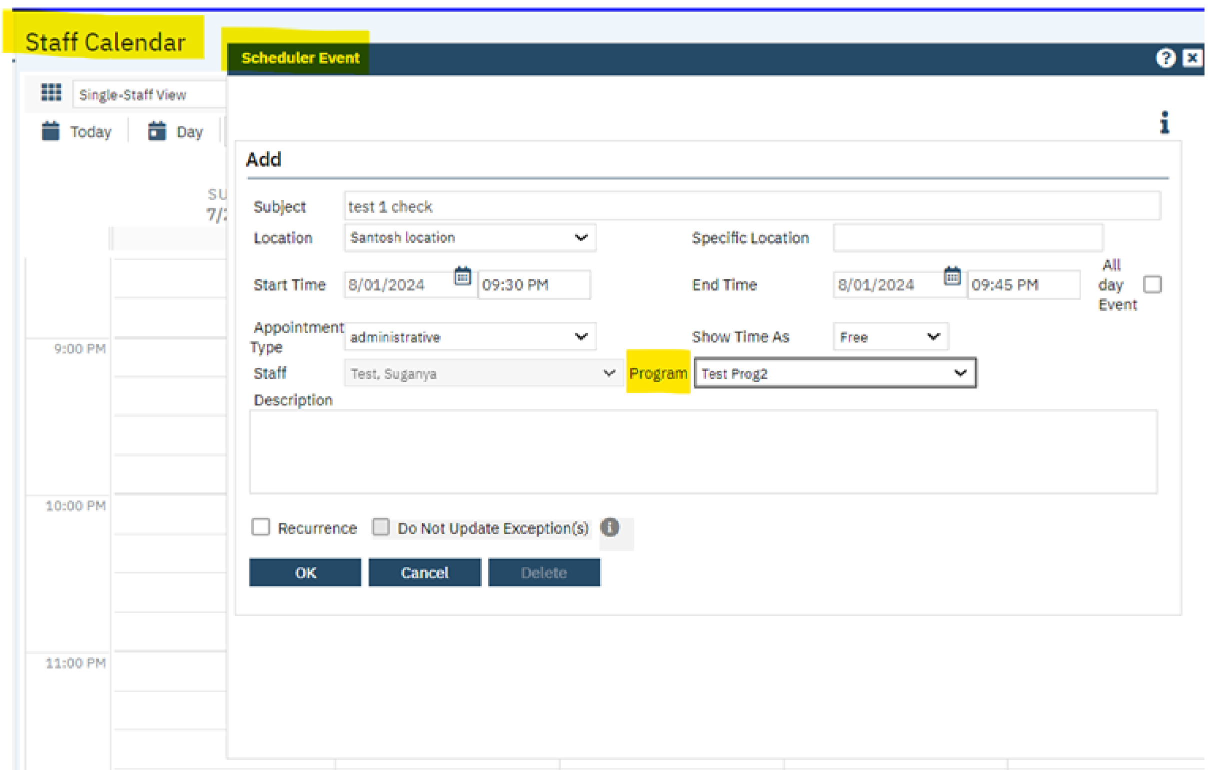
Navigation Path 4: My Office- Appointment search - select the appropriate filters - Click on the search button- Verify the Program column in the grid.

Functionality 'Before' and 'After' release:

Purpose: Having the option to link Programs to appointments will enable a more efficient process for users to find staff availability (in Appointment Search page) under specific programs when needed.

With this release, a new Recode Code category 'SetAppointmentTypesToNotRequireProgram ' is implemented and the below changes have been implemented in the Staff Calendar/My calendar screen and Appointment search screen.

1. The program dropdown has been added in the Scheduler Event popup under the Staff Calendar screen.



2. Program dropdown:

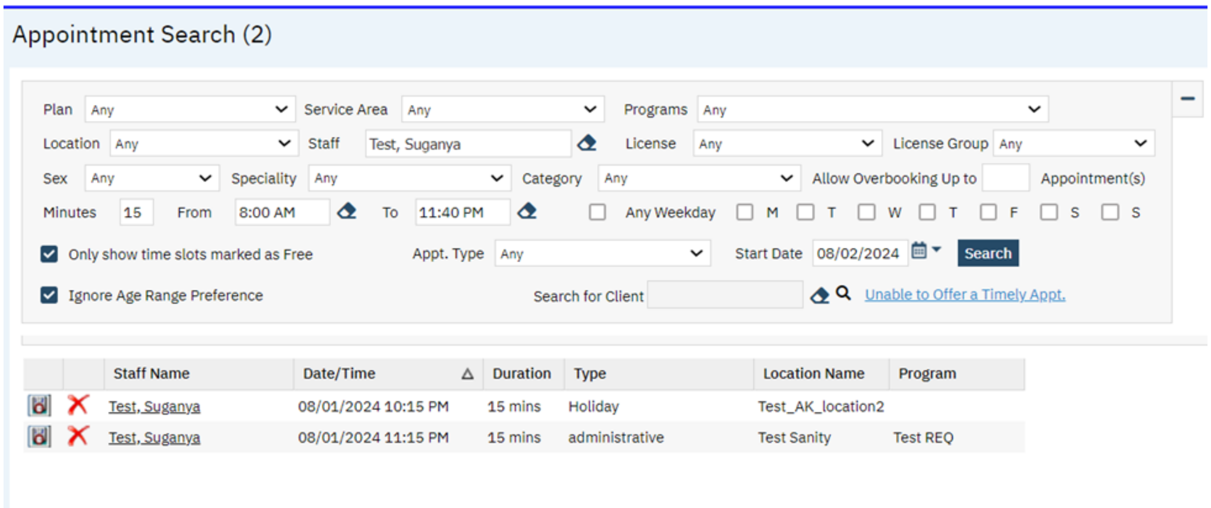
i) It will display all the active programs that are associated with the logged-in staff.
ii) It displays all the 'No Episode' programs. -The programs which exist with the type as 'No episode' in the Program details screen.
iii) Recode Category – SetAppointmentTypesToNotRequireProgram recode which is used to map appointment types (global code IDs) from the Global Code category "APPOINTMENTTYPE", that do not require a Program selection in the Calendar entry pop-up.

3. Appointment Search Screen:

i) The program column is added next to the Location field (i.e.) added to the end of the list in the Appointment search grid.
ii) The program column should be displayed in the downloaded file (Export).

iii) If the user has not selected a Program in the Scheduler Event pop-up (staff Calendar), then that appointment will be listed in the Appointment Search screen without a Program mapping, provided, the Staff is associated with that Program (via Staff Programs).
iv) If the user has selected a Program in the Scheduler Event pop-up, then the Appointment Search screen will display:

- All the appointments are assigned to the selected staff and do not have a Program association. Such appointments will have the "Program" column as blank.
- All the appointments are only associated with the selected Program. Such appointments will display the Program name in the "Program" column.



Data Model Changes: ProgramId, ProgramName columns are added in ListPagePMAppointments table.

Staff/Users

Reference No	Task No	Description
155	EII # 127116	Implementation of a 'Staff Access Rule' & Staff drop-down as a typeable search.

Author: Aishwarya Bommaklar

155. EII # 127116: Implementation of a 'Staff Access Rule' & Staff drop-down as a typeable search.

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

Prerequisites: The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' changes the dropdown fields as a type-able search textbox.

- When the key value is set to "Yes", the author drop-down will display as typeable search text boxes instead of a drop-down.
- When the key value is set to "No", the author drop-down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Navigation Path 1: 'My Office' – 'Arrivals' list page – Click on the 'New' icon – 'Staff' Dropdown.

Navigation Path 2: 'My Office' – 'Reception' screen – Click on the 'Crete Primary Care Visit' icon – 'New Primary Care Entry' popup – 'Provider' dropdown.

Navigation Path 3: 'My Office' – 'Bedboard' screen – Click on 'Status' hyperlink – Click on 'Visit' tab – 'Client Inpatient Visit Details' screen.

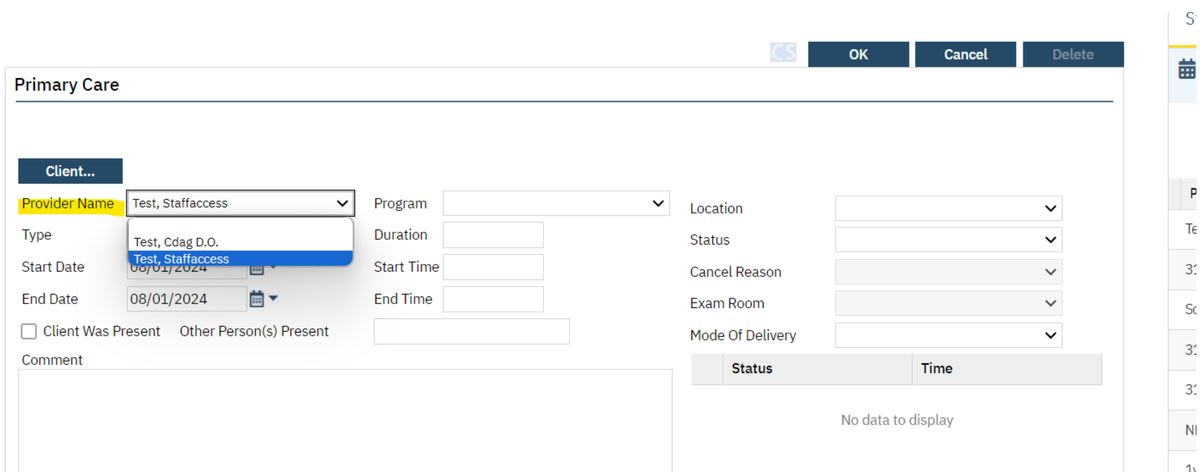
Navigation Path 4: 'My Office' – 'Group Services' screen – Click on the 'DOS' hyperlink – Click on the 'Staff' button.

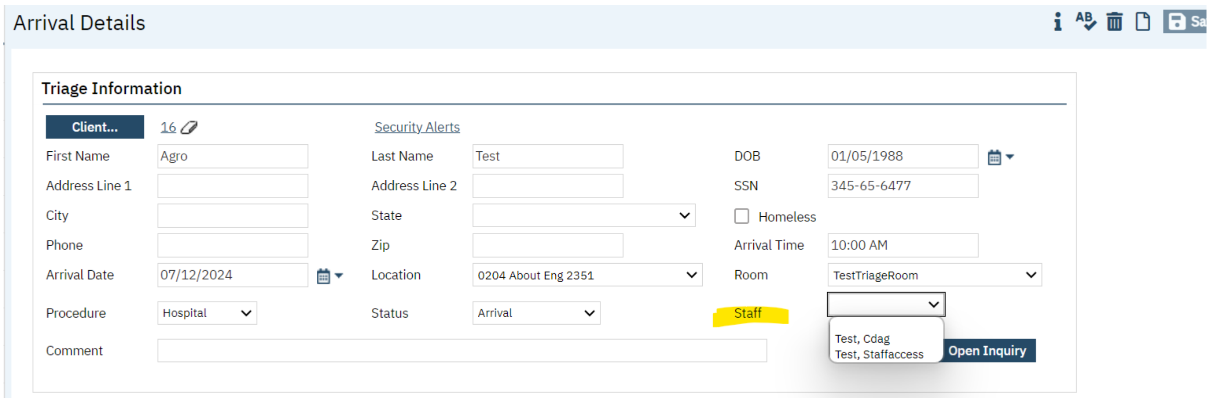
Functionality 'Before' and 'After' release:

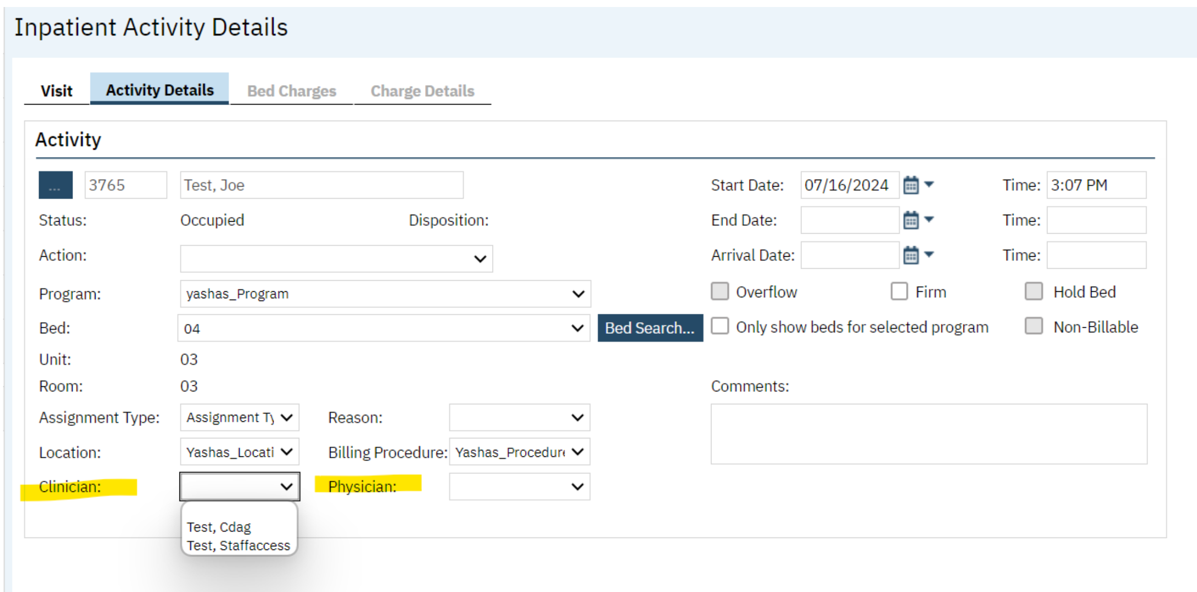
Purpose: To set a 'Staff Access Rule' & to implement the 'Staff drop-down as a typeable search field to improve the system performance when there are large number of staff records.

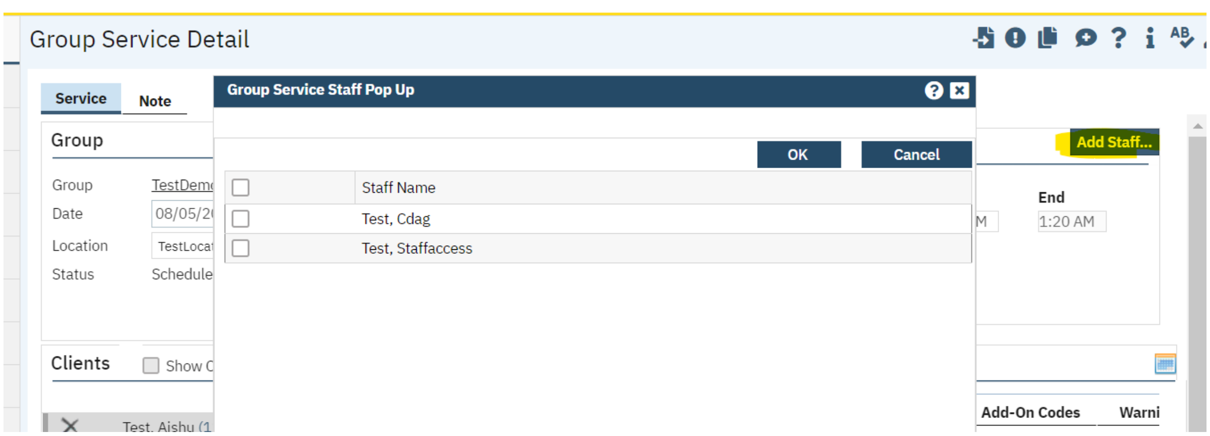
With this release, a 'Staff Access Rule' has been implemented for the below screens:

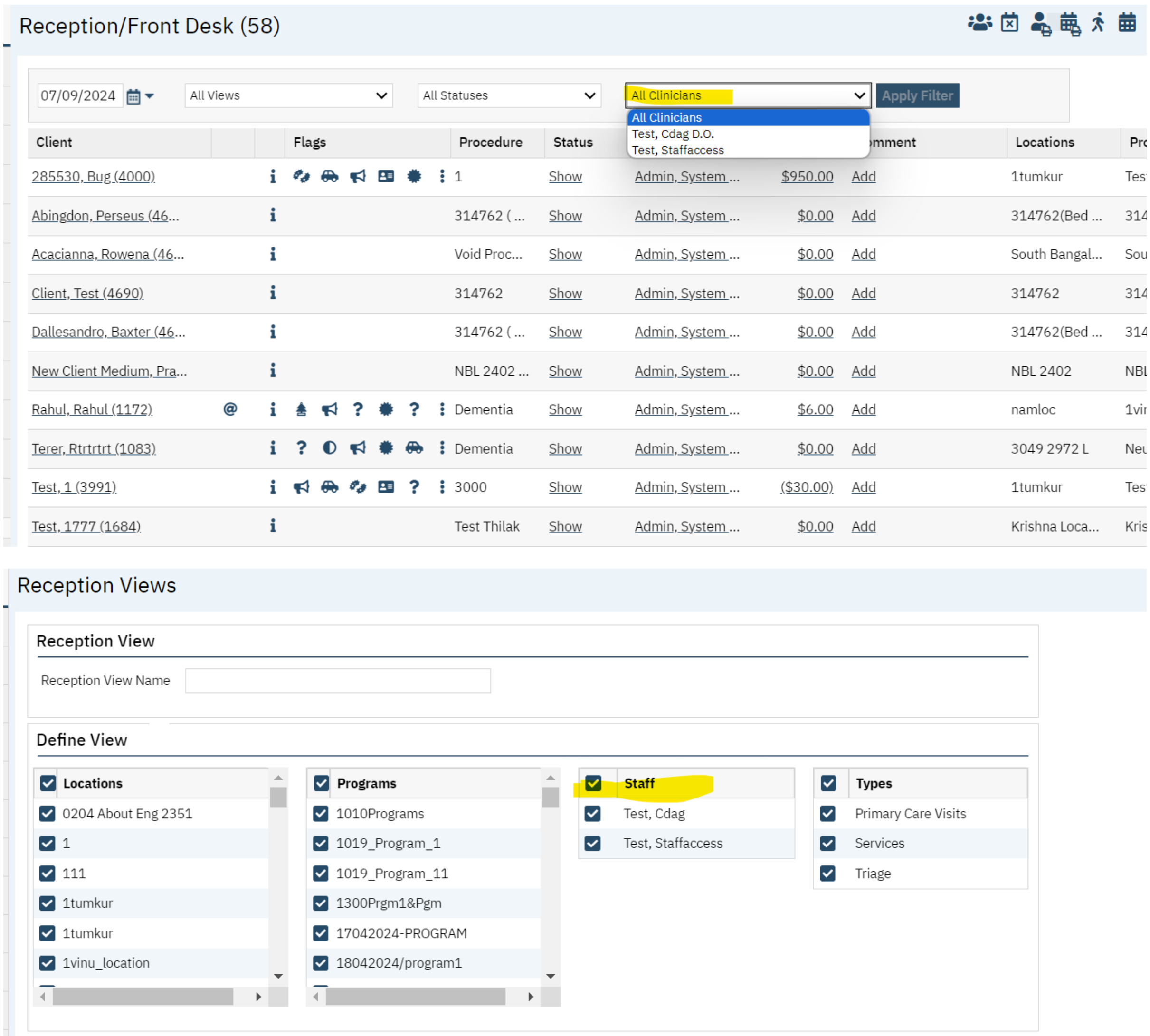
- 'Primary Care Visit' pop-up
- 'Arrivals Details' screen
- 'Client Inpatient Visit Details' screen
- 'Group Service Details' screen
- 'Reception Views'
- 'Reception'




Arrival Details
Triage Information
Client...
16
Security Alerts
First Name
Agro
Last Name
Test
DOB
01/05/1988
Address Line 1
Address Line 2
SSN
345-65-6477
City
State
Homeless
Phone
Zip
Arrival Time
10:00 AM
Arrival Date
07/12/2024
Location
0204 About Eng 2351
Room
TestTriageRoom
Procedure
Hospital
Status
Arrival
Staff
Test, Cdag
Test, Staffaccess
Comment
Open Inquiry

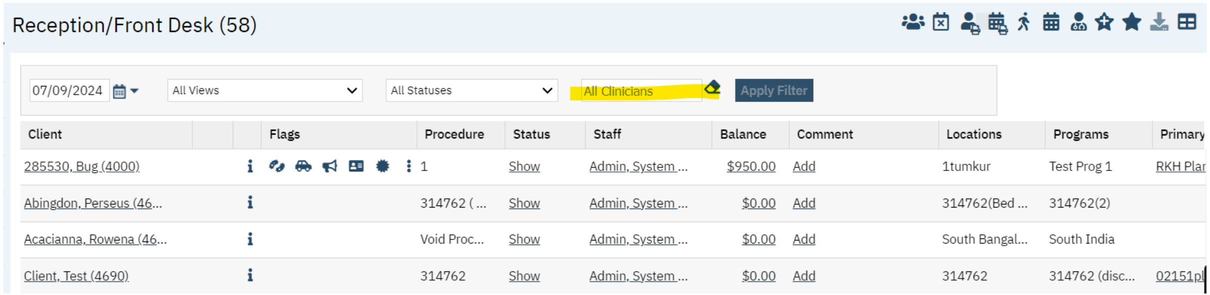

Inpatient Activity Details
Visit
Activity Details
Bed Charges
Charge Details
Activity
3765
Test, Joe
Start Date:
07/16/2024
Time:
3:07 PM
Status:
Occupied
Disposition:
End Date:
Time:
Action:
Arrival Date:
Time:
Program:
yashas_Program
Overflow
Firm
Hold Bed
Bed:
04
Bed Search...
Only show beds for selected program
Non-Billable
Unit:
03
Room:
03
Comments:
Assignment Type:
Reason:
Location:
Yashas_Locati
Billing Procedure:
Yashas_Procedure
Clinician:
Physician:
Test, Cdag
Test, Staffaccess

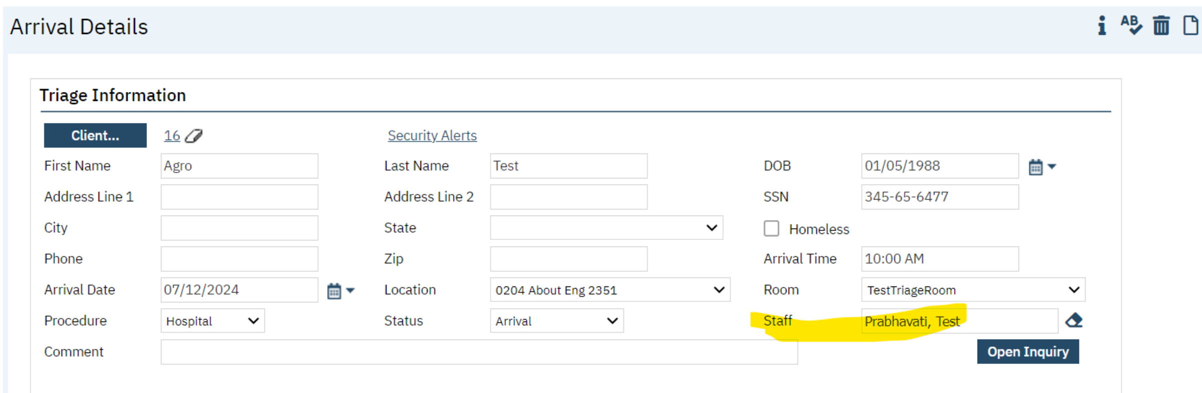

Group Service Detail
Service
Note
Group
Group
TestDemo
Date
08/05/2
Location
TestLocat
Status
Schedule
Clients
Group Service Staff Pop Up
OK
Cancel
Staff Name
Test, Cdag
Test, Staffaccess
Add Staff...
End
1:20 AM
Add-On Codes
Warni

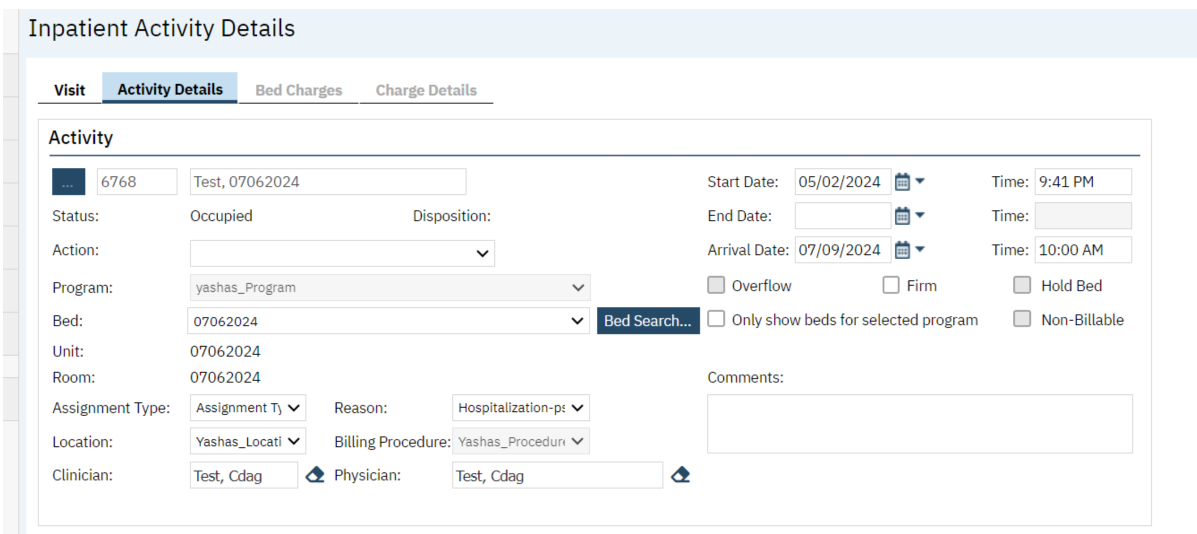


And implemented the Staff drop-down as a typeable search field in the below screens:

- Reception screen – 'Primary Care Visit' pop-up.
- 'Arrivals Details' screen.
- 'Client Inpatient Visit Details' screen.







The below-mentioned permission type is applied to display the values in the 'Primary Care Visit' pop-up', 'Arrivals Details' screen, 'Client Inpatient Visit Details' screen, and 'Group Service Details' screen".

Permission Type: StaffAccessRules

Permission Item:

1. AllStaff
2. LimitedStaff

a) If the logged in staff has "LimitedStaff '' access Rule, then the typeable search textbox displays the staff who is associated with any of the Program that the logged in staff is also associated with.

b) If the logged in staff has "AllStaff" Access Rule, then it will display all the staff in the typeable search textbox.

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

Telehealth

Reference No	Task No	Description
156	Core Bugs # 128489	Cancelled Telehealth Service is not Updated in the Zoom calendar.

Author: Manjunath Malipatil

156. Core bugs # 128489: Cancelled Telehealth Service is not Updated in the Zoom calendar.

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

Prerequisite: A Telehealth Service is scheduled for a client.

Navigation Path 1: Client -- Services – 'Services' List page -- click on New Button – 'Service Detail' screen -- Enter all the required fields -- Click on Save Button -- Telehealth Video Icon -- Telehealth Set up pop Schedule a meeting with Zoom Provider.

Navigation Path 2: Client -- Services -- Select a service to which Telehealth Meeting is scheduled with Zoom Provider -- Service Detail Screen -- cancel the service.

Navigation Path 3: Login to Zoom Application -- In the Meeting section, check whether the meeting details are deleted or not.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the clinician cancelled the telehealth service, the meeting details were not removed from the clinician's Zoom calendar.

With this release, the above-mentioned issue has been resolved. Now, when the clinician cancels the telehealth service in SmartCare, SmartCare will remove the Meeting details from the Clinicians Zoom calendar.

Whiteboard

Reference No	Task No	Description
157	Core Bugs # 128621	Whiteboard: Execution Timeout.

Author: Sithara Ponnath

157. Core Bugs # 128621: Whiteboard: Execution Timeout.

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

Navigation Path: 'My Office' --- Search for 'Whiteboard' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user accessed the 'Whiteboard' screen, execution time out exceptions were logged in the error log table.

With this release, the above-mentioned issue has been fixed. Now, the execution time out exceptions are not logged in the error log table.

Widgets

Reference No	Task No	Description
158	EII # 128494	Typable Search box for Staff in Tracking Widget.
159	Core Bugs # 128499	Dashboard loading issue leads to the display of "Error while loading widgets" error.

Author: Girish Jayanna

158. EII # 128494: Typable Search box for Staff in Tracking Widget.

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

Navigation Path 1: 'Administration -- 'Configuration Keys' list page – 'Configuration Key Details' screen.

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

Pre-requisites:
The Existing System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is used to change the dropdown fields as typeable search textbox.

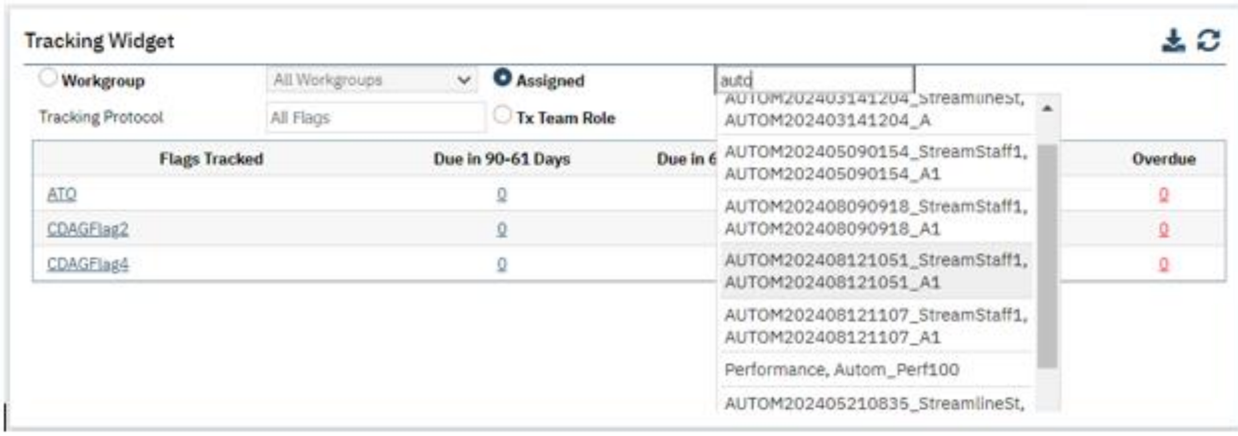
- When the key-value is set to "Yes", then staff drop-downs will display typeable search text boxes instead of a drop-down.
- When the key-value is set to "No", then the staff drop down will be displayed as a drop-down. **This will be the default value of the key, as it drives the existing behavior.**

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., the same as the key value is "No".**

Functionality 'Before' and 'After' release:

Purpose: The Staff dropdowns were not responsive enough when there are large number of Staff records in the environment. So, the Staff drop-downs are modified to type-able search text boxes to improve the system performance.

With this release, the Staff dropdown field will be displayed as a type-able search text box in Tracking Widget, when System Configuration Key 'DisplayStaffAsTypeableSearchTextBox' is set to 'Yes'.



Author: Rakesh Nagnagoda

159. Core Bugs # 128499: Dashboard loading issue leads to the display of "Error while loading widgets" error.

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

Navigation Path: Login to SmartCare application – My Office – 'Dashboard' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The "Error while loading widgets" was displayed in the Dashboard screen. Due to this, the Dashboard widgets were taking more time to load.

With this release, the above-mentioned issue is resolved. Now, the error message is not displayed in the Dashboard screen and widgets are working fine in the Dashboard.

Glossary of System Configuration Keys, Global Codes, Recodes, Data Model Changes.

System Configuration Keys

1. AllowZeroDollarPaymentWhenPosting835

3. DisplayStaffAsTypeableSearchTextBox

22. ShowOnlyRelevantFieldsForCalMHSAOnCoreInquiry

25. DisplayStaffAsTypeableSearchTextBox

38. DisplayStaffAsTypeableSearchTextBox

Global Codes

Recodes

Data Model Changes