RELEASE NOTES: 10/21/2024
Monthly Service Pack – SC.CORE.6.0_1.26.000.2409.014

Executive Summary:

1. The copy button (before Settings icon) will not be visible (when the 'Allow Addition By Affiliate key' is set to 'No' in Affiliate environments. This will prevent the user not to add Screens on Affiliate environments if the 'Allow Addition By Affiliate' key was set to 'No'. **(EII # 128429)**

2. This enhancement- to add Core TEDS logic to generate TEDS episodes-based program enrollment- is done to build a way for the system to create the TEDS Episode information consistently for all the customers. **(EII # 127523)**

3. ~~Now, the users are able to update 'Dose' value and 'Dose Type' in the 'MAT Edit Dosage Popup' screen. The users can also click on the 'Update All' checkbox to change 'Dose' for all the dates in the medication.~~ ~~**(EII #128646)**~~

4. ~~The existing calibration steps instruct users to connect a bottle of water to the pump, but some customers calibrate with the actual methadone solution. To take care of this, The Calibration Workflow is implemented in the MAT management screens.~~ ~~**(EII #127509)**~~

5. ~~The Scheduled dispenses are visible on the MAT Management screen, but front desk staff who are also checking in non-MAT appointments would need to switch back and forth. To accommodate this, the changes are done in the Reception Screen for MAT Medication Scheduled dispenses.~~ ~~**(EII #127202)**~~

6. The changes are done in the Prelogin Page for the Patient Portal screen & non-staff users This is for users to acknowledge the Privacy Policy and Terms of Use to ensure legal compliance like HIPAA, enhance user awareness of data practices, mitigate risks, build trust, and adapt to policy updates, thus safeguarding both the users and the organization's interests. **(EII #128109)**

7. The configuration key ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs functionality is used to hide or show SNOMED code and descriptions in UI and PDF in the documents and screens. **(EII #127444)**

8. Added 'Location' and 'Mode of Delivery'fields in the 'Add-On Codes' tab of the 'Medical Progress Note, the Service Detail, Service note and Group Service details screens. **(EII #127410 & EII #126264)**

9. The "Service Note Reviewer" screen is implemented for all the Service Notes to display the PDFs of the recently completed notes for quick/easy review prior to meeting with a client. **(EII #127591)**

10. The Telehealth credentials screen was a static screen, therefore if a provider updates their password/credentials with SSO, the EHR team had to manually update the credentials on the telehealth screen on the back end for Teams to work. The Telehealth screen has become dynamic now, so that it updates SSO, when users' Teams credentials are created and updated. **(EII #128065)**

**** 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.***

Abbreviation: EII - Engineering Improvement Initiatives

Contents

TASKS SUMMARY – 'CHANGE' RELATED (28)

206	EII #128109	Changes in the Prelogin Page for the Patient Portal screen & non-staff users	Non Staff Users
210	EII #127272	To enhance Order Template Defaults to Orders and Order Sets in Client Orders	Orders
221	EII # 126063	Hotkey/Keyboard Shortcut Descriptions	Performance and Scalability Improvements
229	EII # 127819	Added new values to the 'Action if rule is broken' dropdown and implemented the 'Adjustment code' dropdown.	Plans
232	EII # 127410	E&M Code pop up changes - Adding Location and Mode of Delivery to Add-on Code Screen	Primary Care
233	EII # 128657	Performance Improvement on Claim Line Pay popup - Check Print	Print Check
236	EII # 128712	Implementing a Custom auto link of MCO Providers to Clients.	Provider Client
243	EII # 127202	Changes in the Reception Screen for MAT Medication Scheduled dispenses	Reception
244	EII # 126872	Changes in the Reception screen to set as 'Show' and Signed services back to 'Cancel' or 'No Show'.	Reception
246	EII # 125088	Added additional filters and columns to the 'RWQM Work Queue' list page and also re- arranged the columns.	RWQM
253	EII # 127071	To remove requirement for height and weight for Rx < 18	Rx Application
254	EII # 127276	Rx: Save/Default ALL data in Templates, Retain ALL data in Refill/Modify Action from Original Order, and Label Change	Rx Application
256	EII # 128651	Mapping few more Layman's terminologies to the medication routes.	Rx Application
257	EII # 128284	The "Sure Scripts Medication History" does not reload if the history is available.	Rx Application
~~266~~	~~EII # 128646~~	~~Changes are implemented to MAT Edit Dosage Pop up under the MAT Management details screen.~~	~~SCM Methadone~~
~~267~~	~~EII # 128634~~	~~MAT Management:The 'Completed' status is removed from the Current Satus dropdown in the 'MAT Current Status popup'.~~	~~SCM Methadone~~
~~268~~	~~EII # 127510~~	~~MAT Suboxone dosing workflow is implemented.~~	~~SCM Methadone~~
~~269~~	~~EII # 127509~~	~~The Calibration Workflow is implemented in the MAT management screens.s~~	~~SCM Methadone~~
270	EII # 128429	Screens allowing the copying of Screens to create new ones when the 'Allow Addition By Affiliate' key was set to 'No'	Screens
272	EII # 128409	Implementation of 'Decision Support Intervention Documents' section in 'Screen Details'.	Screens

277	EII # 128612	Imported Batch Service List - Screen changes	Services
278	EII # 126692	Service Notes/ Group Services: Add a validation for Service Notes if a Staff is trying to sign the note at any time before the end time of the scheduled Service.	Services/Notes
283	EII # 126766	To display the Add-On code details on the PDFs generated for all the Service Notes.	Services/Notes
289	EII #126264	The changes are added to the Add-on codes tab of the Service Detail, Service note and Group Service details screens.	Services/Notes
292	EII # 127992	Notifying Users that they are Accessing SmartCare from Non-Supported Browsers or OS.	SmartCare Improvements
295	EII #127444	The configuration key ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs functionality is used to hide or show SNOMED code and descriptions in UI and PDF in the documents and screens.	SmartCare Improvements
303	EII #127452	To implement Lifesize as the Telehealth meeting provider	Telehealth
304	EII #128065	SmartCare Telehealth Credential/password management [Support SSO for MS Teams (Telehealth) in SC]	Telehealth

TASKS SUMMARY – 'NEW FUNCTIONALITY' RELATED (2)

Sl. No	Task No	Summary	Module Name
290	EII #127591	Implementation of "Service Note Reviewer" screen for all the Service Notes.	Services/Notes
299	EII #127523	To add Core TEDS logic to generate TEDS episodes-based program enrollment.	Teds Tracking List

TASKS SUMMARY – 'DEFECT FIXES' (83)

Sl. No	Task No	Summary	Module Name
205	Core Bugs # 129143	My Services page issue with staff search and name apostrophes.	My Services
207	Core Bugs # 128733	Order Template Frequency' Detail: The 'RX Default' checkbox is unchecked when another same Frequency has been created with 'RX Default' checkbox.	Order Template Frequencies
208	Core Bugs # 129152	To show Warning Message before overriding the Rxdefault in Order Template Frequency detail	Order Template Frequencies
209	Core Bugs # 129150	Client Order: Due to an Invalid length parameter passed to the LEFT or SUBSTRING function, the user cannot acknowledge the order to 'Sign' the document.	Orders
~~211~~	~~Core Bugs # 129105~~	~~Scheduled Recurrent services deleted in SmartCare are not being removed in Outlook Calendar.~~	~~Outlook Sync~~

212	Core Bugs # 128711	835 Electronic Payment is not posting adjustments and transfers.	Payments/Adjustments
213	Core Bugs # 129198	Payments/Adjustments:Error message is displayed when trying to modify the existing payment.	Payments/Adjustment
214	Core Bugs # 129185	The 'Refund/Adjustment History' dropdown arrows being cut off in the 'Refund/ Adjustment' tab.	Payments/Adjustment
215	Core Bugs # 128807	Stored Procedure optimization for Performance improvement in List pages, Detail Pages and widgets etc.	Performance and Scalability Improvements
216	Core Bugs # 128895	Performance issue while loading Caseload Reassignment list page.	Performance and Scalability Improvements
217	Core Bugs # 128542	Performance issue.	Performance and Scalability Improvements
218	Core Bugs # 128717	Frequent Deadlocks are occurring in Customer environments due to the SP - ssp_SCDeleteListPagesData.	Performance and Scalability Improvements
219	Core Bugs # 128956	Performance issue with Author Dropdown in Documents and Service/Note.	Performance and Scalability Improvements
220	Core Bugs # 128961	Performance issue while cosigning documents and Services/Notes.	Performance and Scalability Improvements
222	Core Bugs # 129253	ssp_CMListPageClientClaimsData - Optimisation - Client Claims	Performance optimization
223	Core Bugs # 129233	Performance issue in the Import 837 List page	Performance optimization
224	Core Bugs # 129267	Performance issue in the Provider contracts list page	Performance optimization
225	Core Bugs # 129245	ssp_CMGetBillingCodeValidMembers - Optimisation	Performance optimization
226	Core Bugs # 129338	Performance issue in the 'Services From Claims' list page	Performance optimization
227	Core Bugs # 129398	Placement History: The Child Hyperlink is redirected to the incorrect screen.	Placements
228	Core Bugs # 128831	Plan Template Not Pulling in All Standard Billing Codes	Plans
230	Core Bugs # 129302	Primary Care Appointments are not Saving on Correct Provider Name.	Primary Care
231	Core Bugs # 129116	Primary Care: Mode of delivery is not displaying on the EM Code Pop-up.	Primary Care
234	Core Bugs # 129351	Observed slowness in the Procedure/Rates List page	Procedure/Rates
235	Core Bugs #129462	Program Details: Rules Tab : Modify Button is Inactive	Programs
237	Core Bugs #129434	The screen shifting to a different tab than the selected tab when saving Psychiatric Note.	Psychiatric Note
238	Core Bugs # 128785	Error was displaying when the user tries to open Reception / Front Desk (My Office)	Reception
239	Core Bugs # 129098	Reception: Error message was logged in the error log table	Reception

240	Core Bugs # 128800	Reception Screen: The Flags are duplicating When Hitting Apply Filter	Reception
241	Core Bugs # 129177	Location name glitch in Front Desk/Reception.	Reception
242	Core Bugs # 129385	Unable to print daily schedule with selected clinician from 'Reception/Front Desk'.	Reception
245	Core Bugs # 129183	The selected values are not added in the 'Risk factor look up' and 'Protective factor lookup' popup & not displayed in the 'Risk Assessment' PDF.	Risk Assessment
247	Core Bugs # 128169	Pharmacy Preview Page not showing the days correctly	Rx Application
248	Core Bugs # 128736	The user received critical alerts because the medication is not saved due to network latency or a sluggish internet connection	Rx Application
249	Core Bugs # 128886	Medication Titration Incorrectly Showing for multiple instructions	Rx Application
250	Core Bugs # 128920	Queued Orders: Loss of Data when Multiple Users concurrently queued prescriptions	Rx Application
251	Core Bugs # 128940	Incorrect NDC code is sent to the Surescripts when the user changes the strength of the medications while approving the Refills and prescribes them electronically	Rx Application
252	Core Bugs # 128946	Rx Logging out when re-ordering medication by the Non prescriber	Rx Application
255	Core Bugs # 129280	Modify the Route Description Details	Rx Application
258	Core Bugs # 129317	Send Script Requiring Script Clarification Due to mg/ml Confusion	Rx Application
259	Core Bugs # 128941	Getting an error Message when generating a PMP report.	Rx Application
260	Core Bugs # 128540	Scanning: Error during batch scan	Scanning
261	Core Bugs # 128655	Uploading of selected files in the 'Batch Image Upload' popup in the 'Scanning' screen is not working	Scanning
262	Core Bugs # 128758	Scanning: Uploaded PDF files are not displayed within the frame	Scanning
263	Core Bugs # 128842	Scanning: Metadata tab for lab reviewers is not appearing for Scanned Medical Records	Scanning
264	Core Bugs # 128964	Scanning: Out of Memory Exception was thrown	Scanning
265	Core Bugs # 129483	When uploading records to client files using the Scanning feature, the Provider chosen during the upload process is not reflected on the CM Events list page.	Scanning
271	Core Bugs #129133	Focus highlighter is causing difficulty for the user to identify the focused elements when the user uses the 'Tab Indexing on radio buttons and checkbox items.	Screens

273	Core Bugs # 128856	Diagnosis Validation - ensure only valid diagnosis codes are included in the diagnosis document.	Services
274	Core Bugs # 129010	File upload changes duration	Services
275	Core Bugs # 129243	Due to an error message user is unable to Import Services	Services
276	Core Bugs #129169	Services list page taking more time to display the data.	Services
279	Core Bugs # 128738	Psychiatric Note: 'Same as Last Visit' checkbox issue	Services/Notes
280	Core Bugs # 128857	Recurring Service: A signed note is getting deleted along with the scheduled services	Services/Notes
281	Core Bugs # 128888	Duration is not retained on add-on Psychotherapy	Services/Notes
~~282~~	~~Core Bugs # 129113~~	~~Individual Service Note (C): cutting off Safety Plan in the PDF~~	~~Services/Notes~~
284	Core Bugs #129138	Getting an Error Log entry in the errorlog table.	Services/Notes
285	Core Bugs #129320	Psych Note PDF not displaying correctly after signature.	Services/Notes
~~286~~	~~Core Bugs #129285~~	~~Individual Service Note (C): Inactive EBPs are showing on the PDF.~~	~~Services/Notes~~
287	Core Bugs #129262	Error log was created in the service note.	Services/Notes
288	Core Bugs #129139	Error message is logged in the ErrorLog table	Services/Notes
291	Core Bugs # 127780	Generic handler errors in the ErrorLog table	Smartcare Improvements
293	Core Bugs #129221	Error logged in Errorlog table on updating, deleting Telehealth services	Smartcare Improvements
294	Core Bugs #129054	Input String not in correct format red errors	Smartcare Improvements
296	Core Bugs # 128915	R6 - Spell Checker not working	Spell Checker
297	Core Bugs # 128792	'Staff Details': Duplicate Permission items are displayed for the screens in the 'Permission' section of 'Permission Items' list	Staff/Users
298	Core Bugs #129161	[Clinical] [System] New Productivity Report is not working	Staff/Users
300	Core Bugs # 128677	The 'TEDS Tracking List' Page is showing deleted records	Teds Tracking List
301	Core Bugs #129154	A new TEDS episode was created, and the previous TEDS episode and program were discharged during bed transfer	Teds Tracking List
302	Core Bugs # 128943	Telehealth Zoom Meetings are deleted when the user is set to 'Show' status from the 'Reception/Front Desk' screen	Telehealth
305	Core Bugs #129395	'MFA' is not prompting for the user when he tries to log in to the 'SmartCare' application from a different computer.	Two/Multi Factor Authentication
306	Core Bugs # 128860	Whiteboard: Whiteboard displays incorrect observation check	Whiteboard
307	Core Bugs # 128816 & Core Bugs # 128869	Contacts/Flags Widget for Flags: Shows Nothing After Clicking a Link	Widgets
308	Core Bugs # 128859	Taking more time to load My Caseload list page when clicking the hyperlinks in the Caseload widget	Widgets

309	Core Bugs # 128906	Error displayed while loading the Widgets in Dashboard	Widgets
310	Core Bugs # 129055	Error in Custom Widgets 'BMI' and 'Vitals' that has Button	Widgets
311	Core Bugs # 129081	Missing of the 'CustomeWidgetAjaxRequest()' function while developing widgets	Widgets
312	Core Bugs # 129101	Widgets loading/Time out issue in the Dashboard	Widgets
313	Core Bugs #129269	Widget Comment Remains visible on the screen even when navigated to other screens.	Widgets
314	Core Bugs #129314	Dashboard:The changes made to the widgets are not saved after refreshing.	Widgets
315	Core Bugs #129025	Staff documents were showing as double entries on the Supervision Reports.	Widgets
316	Core Bugs # 129171	Incident Report Widget does not display the accurate number of reports from the 'Incident Reports' list page for 'Progress' and 'Assigned for Review'.	Widgets

Functionality-wise Task Details:

My Services

Reference No	Task No	Description
205	Core Bugs # 129143	My Services page issue with staff search and name apostrophes.

Author: Aishwarya Bommaklar

205: Core Bugs # 129143: My Services page issue with staff search and name apostrophes.

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

Navigation Path 1: 'My Office' – 'My Services' – Search for the 'Staff who has 'apostrophe' in their name.

Navigation Path 2: 'My Office' – 'Dashboard' – Select 'Supervisee Service Needing Attention' widget – Click on 'Services Count'.

Functionality 'Before' and 'After' release:

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

1. When the user tried to search for a staff member with an apostrophe in their name, the system would not list that staff name. Instead, the user had to enter two apostrophes to get the staff name to appear in the search results.

2. The 'Supervisee Service Needing Attention' widget was not navigated to the 'My Services list page' when the 'Services Count' hyperlink was clicked.

With this release, the above-mentioned issues have been resolved. Now,

1. The user can search for a Staff name with 'apostrophe' without any issue.

2. The 'Supervisee Service Needing Attention' widget navigates to the 'My Services list page' when the 'Services Count' hyperlink is clicked.

Non Staff Users

Reference No	Task No	Description
206	EII # 128109	Changes in the Prelogin Page for the Patient Portal screen & non-staff users.

Author: Lakshmi Kumarappan

206: EII # 128109: Changes in the Prelogin Page for the Patient Portal screen & non-staff users.

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

Navigation Path 1: Login Page – Prelogin Page for the 'Patient Portal' section - click the 'Privacy Policy' clickable link.

Navigation Path 2: Login Page – Prelogin Page for the 'Patient Portal' section- click the 'Terms of Use' clickable link.

Navigation Path 3: Login as a non-staff user - 'Privacy Policy' and 'Terms of Use' section.

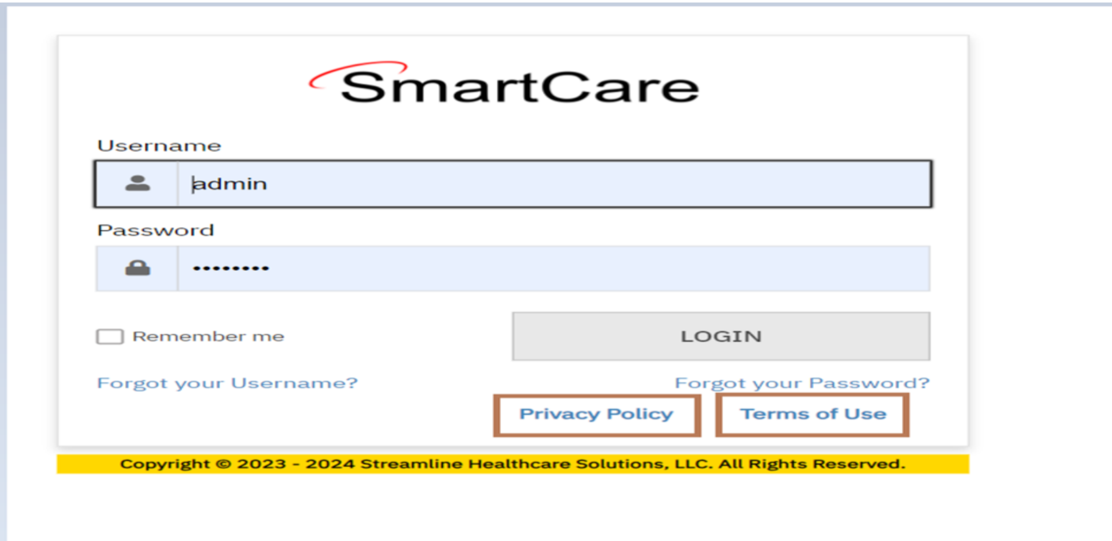
Functionality 'Before' and 'After' release:

Purpose: The users to acknowledge the Privacy Policy and Terms of Use to ensure legal compliance like HIPAA, enhance user awareness of data practices, mitigate risks, build trust, and adapt to policy updates, thus safeguarding both the users and the organization's interests.

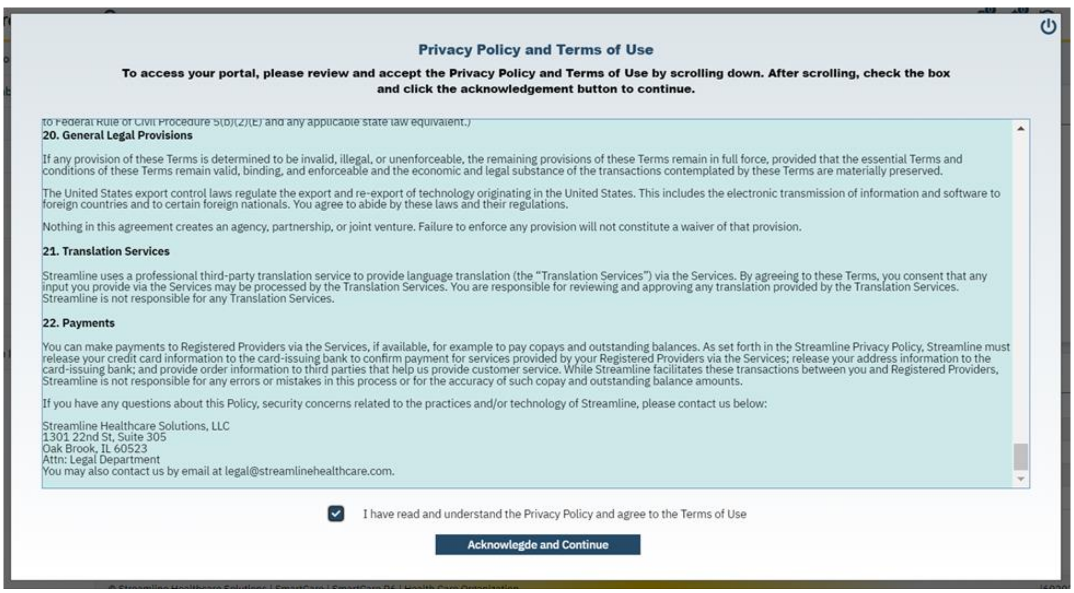
With this release, the following changes have been implemented in the Prelogin of Patient Portal Screen of SmartCare' .

1. Added the 'Privacy Policy' clickable hyperlink and 'Terms of Use' clickable hyperlink to the 'Prelogin Page' for the 'Patient Portal' screen of SmartCare.

Screenshot:



3. When the user logs in for the first time, the 'Privacy Policy/Terms of Use' screen will display with the label, scrollbar, a checkbox with the label, and the 'Acknowledge and Continue' button.

4. 

Privacy Policy/Terms of Use: This is a label.

To access your portal, please review and accept the Privacy Policy and Terms of Use by scrolling down. After scrolling, check the box and click the acknowledgment button to continue: This is a label

Scroll bar: The scroll bar will detect when the user has scrolled to the bottom of the content.

Textbox: This textbox contains a scrollable container for displaying the content of the Privacy Policy and Terms of Use text.

Checkbox: This is a checkbox contains the text "I have read and understand the Privacy Policy and agree to the Terms of Use"

'Acknowledge and Continue' button: This is a button for accepting the 'Privacy Policy and Terms of Use'.

Standard Log Out button: The user can log out of the application.

Data Model Changes: A new 'NonStaffAcknowledgements' table is added.

Order Template Frequencies

Reference No	Task No	Description
207	Core Bugs # 128733	Order Template Frequency' Detail: The 'RX Default' checkbox is unchecked when another same Frequency has been created with 'RX Default' checkbox.
208	Core Bugs # 129152	To show Warning Message before overriding the Rxdefault in Order Template Frequency detail.

Author: Chaitali Patil

207: Core Bugs # 128733: Order Template Frequency' Detail: The 'RX Default' checkbox is unchecked when another same Frequency has been created with 'RX Default' checkbox.

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

Navigation Path: Go search – 'Order Template Frequencies' – Click on the 'New' icon – enter the display name --- select 'Map With Rx Frequency' from dropdown – check 'RX' Default checkbox – fill the required fields – click on 'Save' – if 'RX' default is already set for a another 'Rx frequency' in 'Order Template Frequency' Detail screen – then validation will be displayed.

Functionality Before and & After Release:

Before this release, here was the behavior. In the 'Order Template Frequency' Detail screen, when a user selected the 'RX Default' checkbox for any 'Rx frequency', the checkbox was unchecked when another same frequency was created by checking the 'RX Default' checkbox.

With this release, the above-mentioned issue has been Resolved. Now, when a user tries to create an 'Rx frequency' by checking 'RX Default' checkbox, if the 'RX Default' checkbox is checked for an another 'Rx Frequency' in the 'Order Template Frequency' Detail screen, then the below validation message is displayed once the user clicks on the 'Save' button.
Validation Message: "The selected Rx Frequency is already set as default with another frequency -TESTOP".

Author: Chaitali Patil

208: Core Bugs # 129152: To show Warning Message before overriding the Rxdefault in Order Template Frequency detail.

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

Navigation Path: Go search – 'Order Template Frequencies' – Click on the 'New' icon – enter the display name --- select 'Map with Rx Frequency 'from dropdown – check 'RX' Default checkbox – fill the required fields – click on 'Save' – if 'RX' default is already set for a another 'Rx frequency' in 'Order Template Frequency' Detail screen – then warning message will be displayed on click on save.

Functionality Before and & After Release:

Before this release, here was the behavior. When a user tried to create an 'Rx frequency' by checking 'RX Default' checkbox, if the 'RX Default' checkbox is checked for an another 'Rx Frequency' in the 'Order Template Frequency' Detail screen, the below validation message was displayed once clicking on the 'Save' button.

Validation Message: "The selected Rx Frequency is already set as default with another frequency -TESTOP"

With this release, the above-mentioned issue has been Resolved. Now, when a user tries to create an 'Rx frequency' by checking 'RX Default' checkbox, if the 'RX Default' checkbox is checked for an another 'Rx Frequency' in the 'Order Template Frequency' Detail screen, then instead of Validation message below Warning message is displayed once clicking on the 'Save' button.

Warning Message: "The selected Rx Frequency is already set as default with another frequency – Evening"

Orders

Reference No	Task No	Description
209	Core Bugs # 129150	Client Order: Due to an Invalid length parameter passed to the LEFT or SUBSTRING function, the user cannot acknowledge the order to 'Sign' the document.
210	EII # 127272	To enhance Order Template Defaults to Orders and Order Sets in Client Orders

Author: Smruthi Srikanth

209: Core Bugs # 129150: Client Order: Due to an Invalid length parameter passed to the LEFT or SUBSTRING function, the user cannot acknowledge the order to 'Sign' the document.

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

Navigation Path: 'Client' search – Search a client – 'Client Order' – Click on the 'New' icon– 'Client Order' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Client Order' screen, when the user selected medication with interaction, then the user was unable to acknowledge the order by 'Signing' the document. The below error message was displayed when the 'Ack' button was clicked in the 'Order List' section of the 'Order' tab.

Error Message: "Error: Invalid length parameter passed to the LEFT or SUBSTRING function.*****ssp_SCInsertClientOrderMedicat*****792*****16*****3*****ssp_SCInsertClientOrderMedicat*****1147*****16*****1*****ssp_PostOrderSignature*****229*****16*****1"

With this Release, the above-mentioned issues have been fixed. Now, the user can acknowledge the order for medication with 'Interaction', by 'Signing' the document without encountering the above error message.

Author: Sithara Ponnath

210: EII # 127272: To enhance Order Template Defaults to Orders and Order Sets in Client Orders.

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

Navigation Path 1: 'Administration' --- 'Orders' or 'Order Set Up' screen --- Click on 'New' icon and create the orders for the below order types --- Click on 'Save' button.

- Activity
- Medication
- Labs
- Consults
- Procedures
- Safety Check
- Adaptive Equipment
- Radiology
- Additional
- Nursing
- Nutrition

Navigation Path 2: 'Administration' --- 'Order Template Frequencies' screen --- Click on 'New' icon --- Select 'Map with Rx Frequency' dropdown value as 'Weekly' or 'Twice a Week' --- Enter other required data --- Check the 'Select Days' checkbox – Select 'Default Days(s)' checkbox --- Click on 'Save' button.

Navigation Path 3: 'Administration' --- 'Order Sets' Screen --- Click on 'New' icon --- Create a new Order Set – Enter require data --- Search and select an Order(s) of any 'Order Type' where default values are saved --- Click on 'Add' button --- Click on 'Save' button --- Click on 'Set Default' button.

Navigation Path 4: 'Client' --- 'Client Orders' Screen --- Click on 'New' icon --- Search and select an Order(s) of any 'Order Type' where default values are saved --- Click on 'Insert' button --- Click on 'Save/Sign' button.

Navigation Path 5: 'Client' --- 'Client Orders' Screen --- Click on 'New' icon --- Search and select an Order Set where default values are saved for the orders --- Click on 'Insert' button --- Click on 'Save/Sign' button.

Functionality 'Before' and 'After' release:

Purpose: To allow users to save some of the fields as defaults. This will save data entry time and reduce risk for user entry errors.

With this release, the below functionalities have been implemented in 'Order Set', 'Client Orders' and

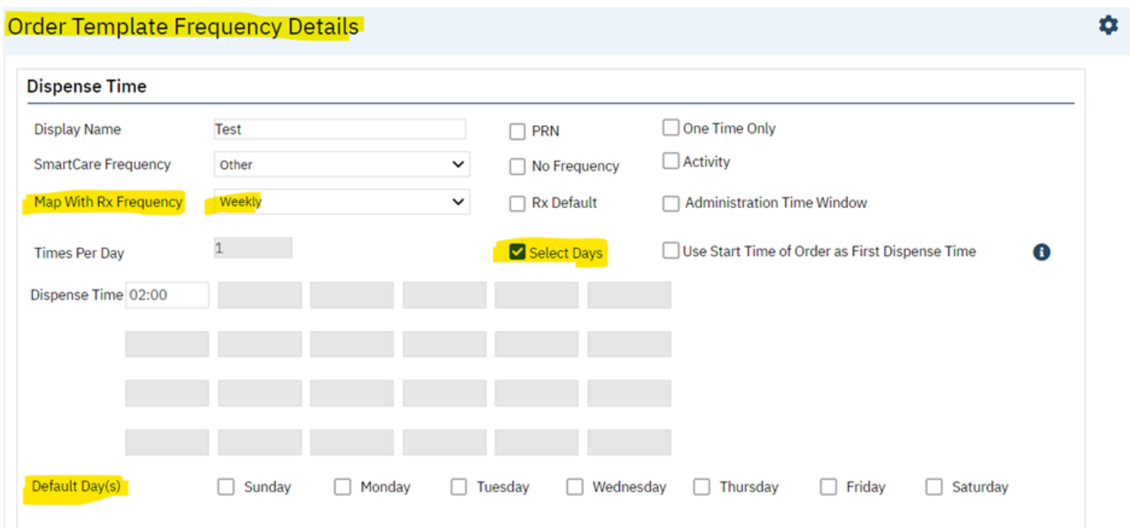
'Order Template Frequencies' screens.

- Implemented a change in 'Order Template Frequencies' screen for the 'Select Days' field.
- Implemented changes to make some of the fields default in the 'Orders' or 'Order Set Up' screen and these saved values will then be initialized while selecting the Order(s) in Orders and Order Set tabs in Client Orders screens.

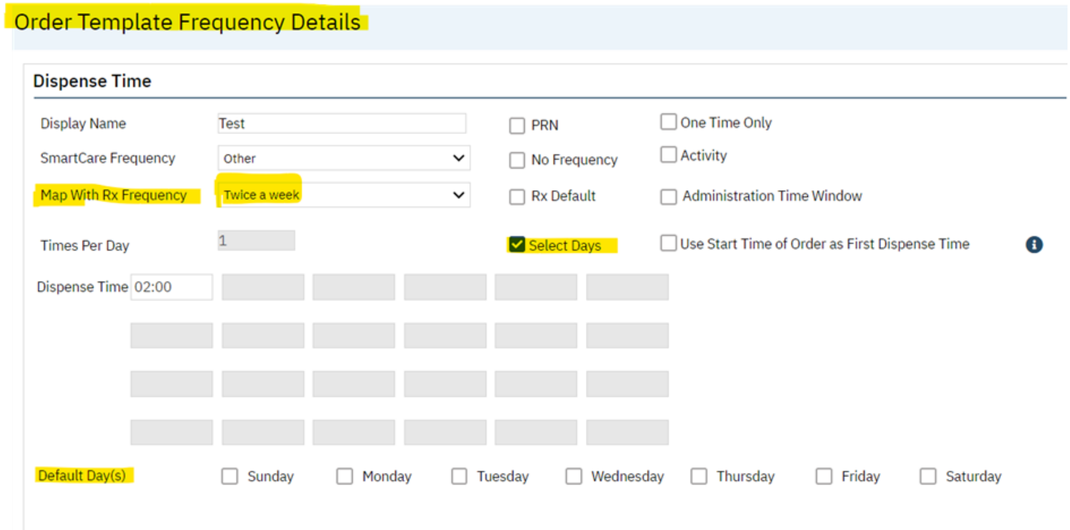
Changes Implemented in the Order Template Frequency Details Screen

- When user selects the 'Map with Rx Frequency' dropdown value as 'Weekly' or 'Twice a Week' under the 'Dispense Time' section of 'Order Template Frequency Details' screen, the 'Select Days' checkbox will be enabled based on the existing functionality and upon selecting this checkbox newly added 'Default Day(s)' field will be displayed, and all the days checkboxes will be enabled. When user deselects the 'Select Days' checkbox, then the 'Default Day(s)' field will be hidden.
- Default Days will have checkboxes from Sunday to Monday and its not a required field.

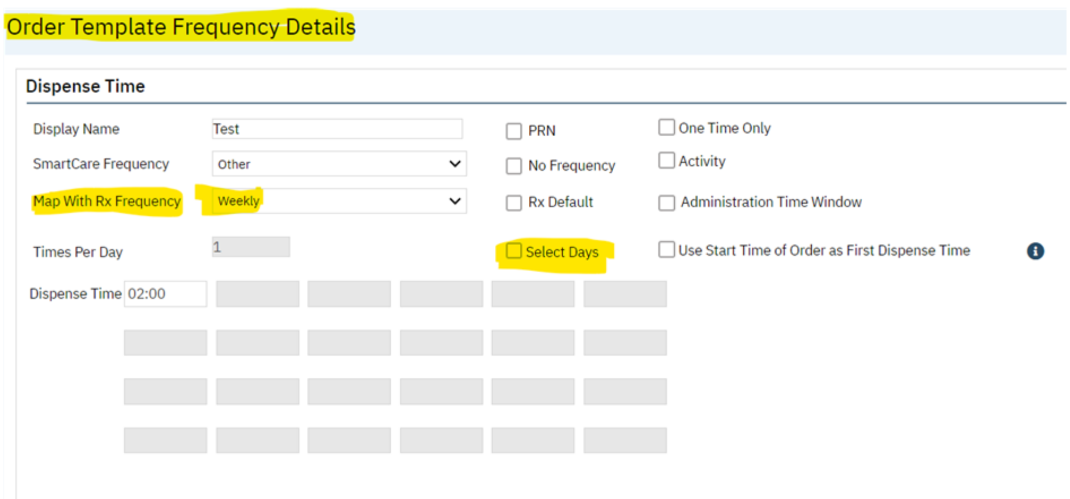
Order Template Frequency Details screen when 'Select Days' checkbox is selected for Weekly frequency.



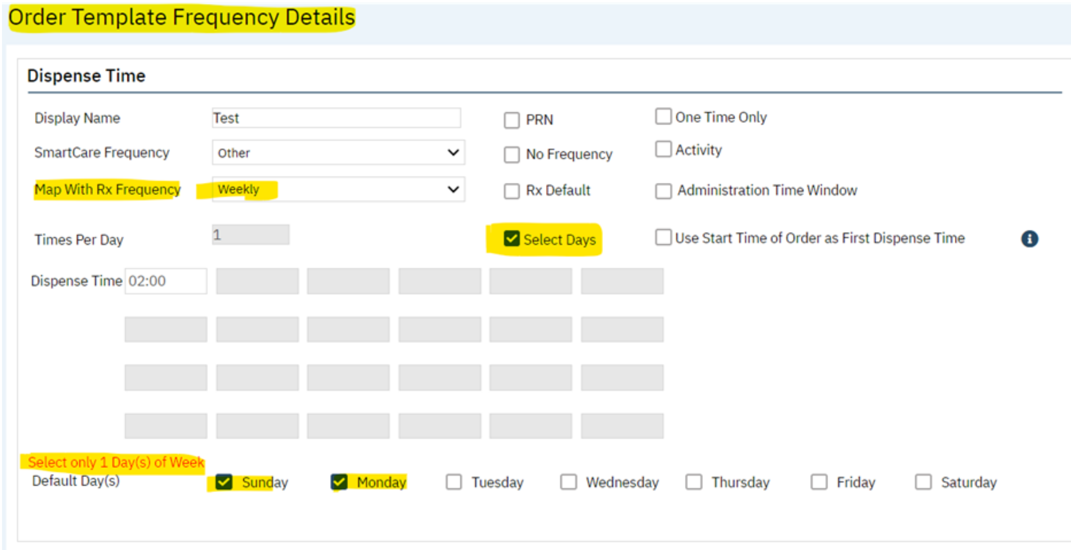
Order Template Frequencies screen when 'Select Days' checkbox is selected for Twice a Week frequency.



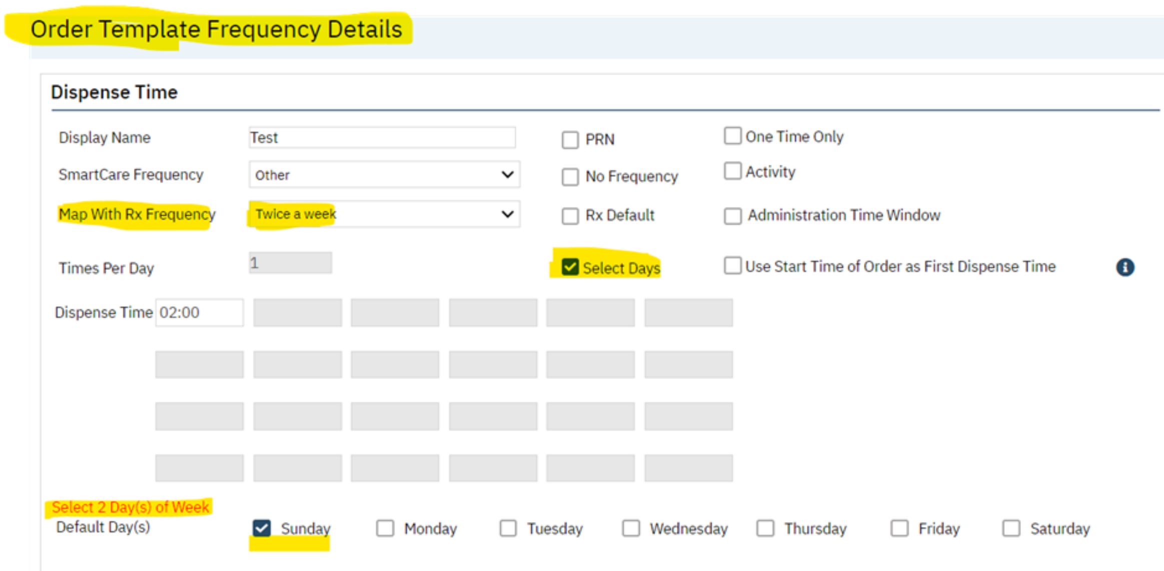
Order Template Frequencies screen when 'Select Days' checkbox is deselected.



- If user selects 'Weekly' in the 'Map with Rx Frequency' dropdown, then only one 'Default Day(s)' checkbox will be allowed to select. If user selects more than one checkbox, then a validation message "Select Only 1 Day(s) of Week" will be displayed as below on clicking Save button

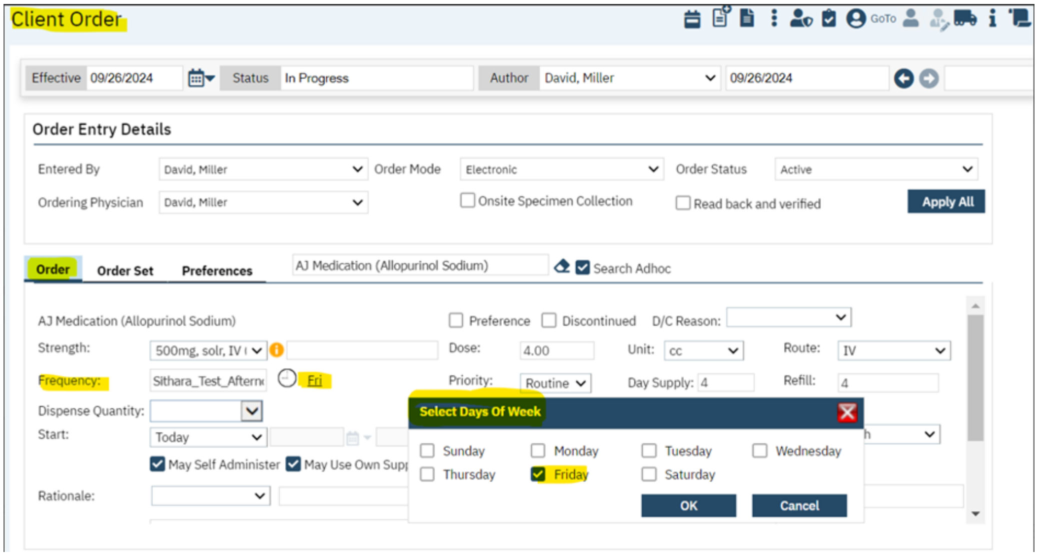


- If user selects 'Twice a Week' in the 'Map with Rx Frequency' dropdown, then only two 'Default Day(s)' checkboxes will be allowed to select. If selected more than two checkboxes or selects only one checkbox, then a validation message "Select 2 Day(s) of Week" will be displayed as below on clicking Save button.



- The selected day(s) will be displayed in the Orders/Order Set tab in the Client Orders screen as 'Mon','Tue' next to the 'Frequency' field and it is a hyperlink. Clicking on the hyperlink will display Select Days Of Week pop-up will be displayed.

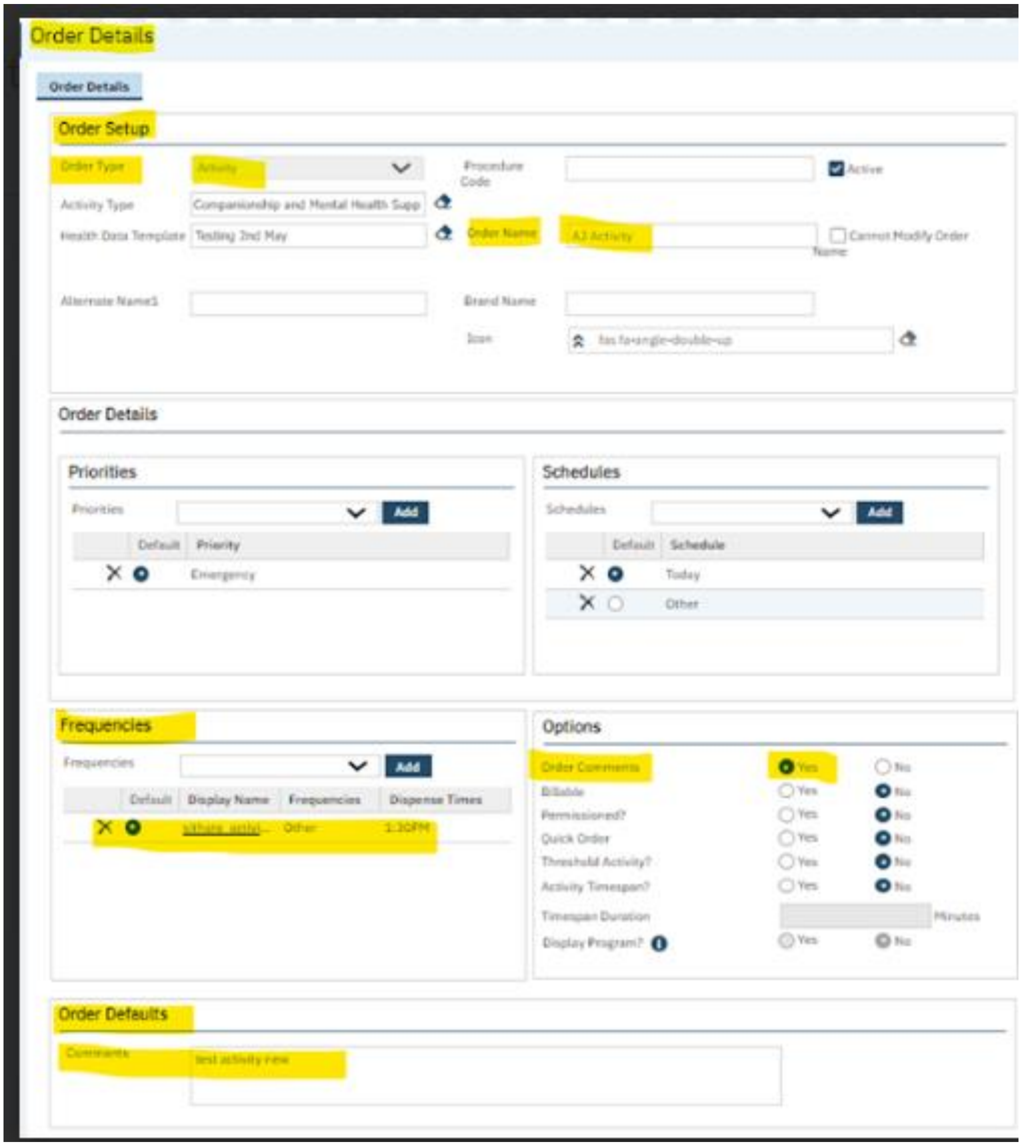
  For example, instead of 'Select Days of Week' it would display 'Fri' if Friday was selected in the associated Order Template Frequency Details.



Changes Implemented in the Order Set Up screen for default mapping in Order and Order Set tab in Client Order screen

- A new default mapping has been implemented for the below fields for the **Order Type: Activity, Procedures, Nursing, Nutrition, Radiology, Adaptive Equipment, Consults and Additional** to Client Order and Order Set.

Screen shot for Order Type -Activity:



Ø **Frequencies:** User can set up the frequencies in the 'Order Template Frequencies screen' and this can be added from the 'Frequencies' dropdown in the Order Set Up screen.

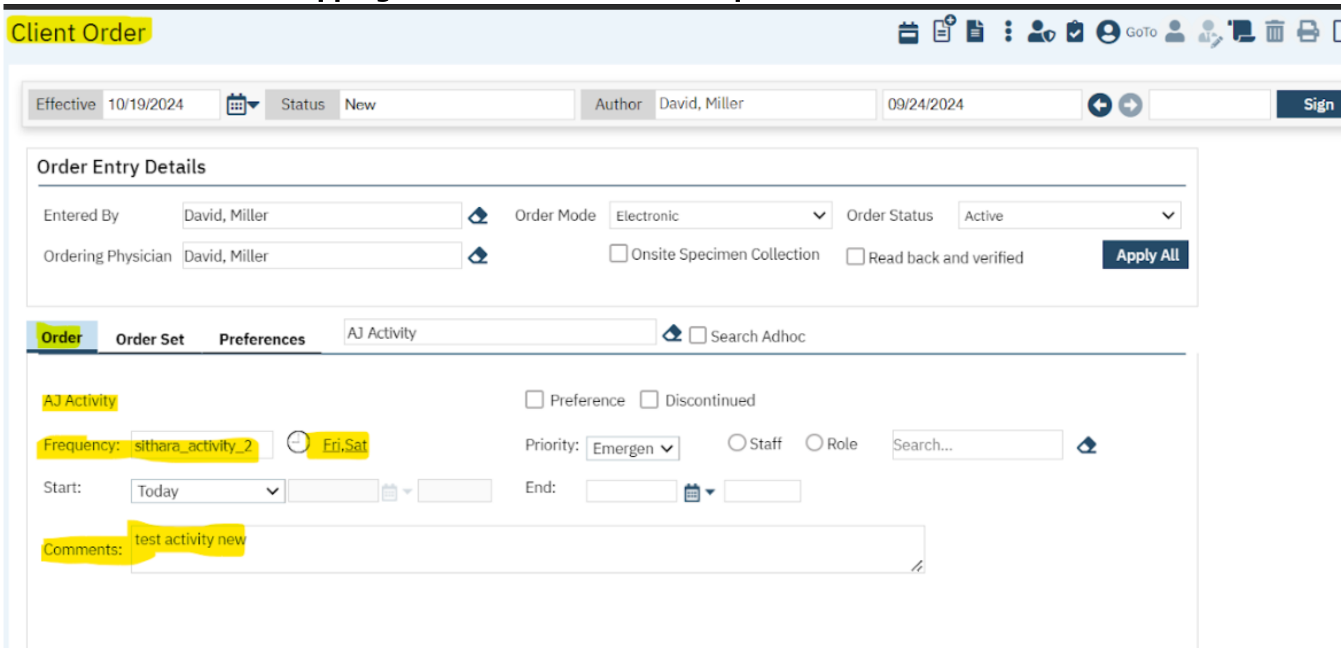
- This field will be mapped to Frequency field in the Orders and Order Sets in Client Orders screen. If the frequency has default days, then the selected day(s) will be displayed in the Orders/Order Set tab in the Client Orders screen as 'Mon','Tue' next to the 'Frequency' field and it is a hyperlink.

Ø **Comments:** When 'Order Comments = Yes' in the 'Options' section of Order Set Up screen, the 'Comments' textbox will be shown in the 'Order defaults' section and a free text up to 250 characters can be entered. If 'Order Comments = No', then the Comments textbox will be hidden.

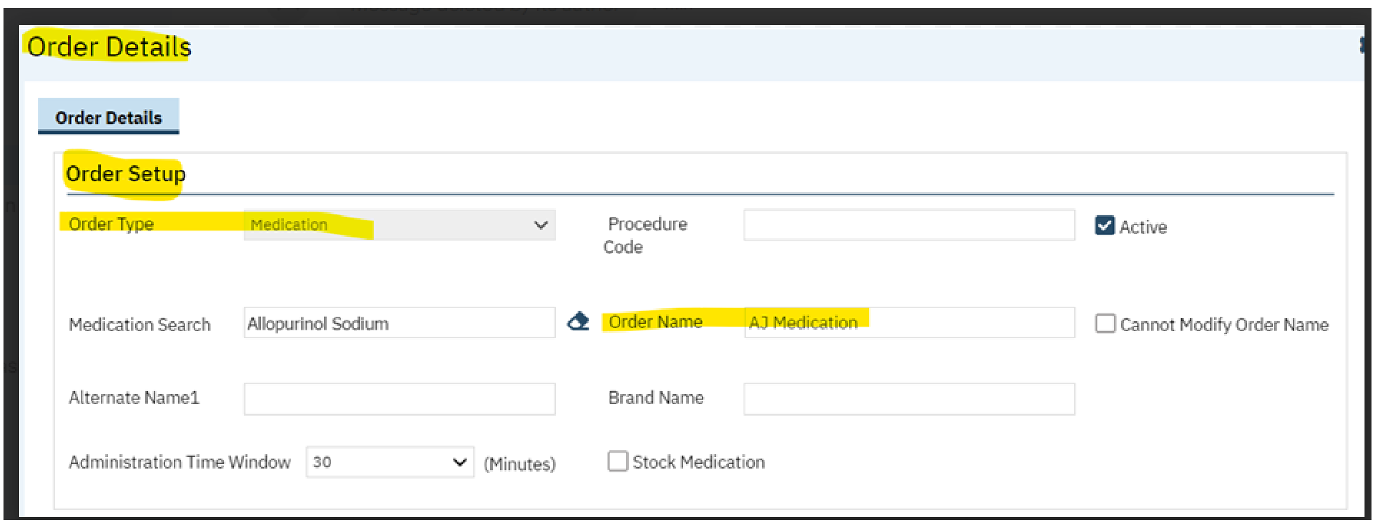
This new Default field will map to Order – Comments; Order Set – Comments in Client Order screen as shown below.

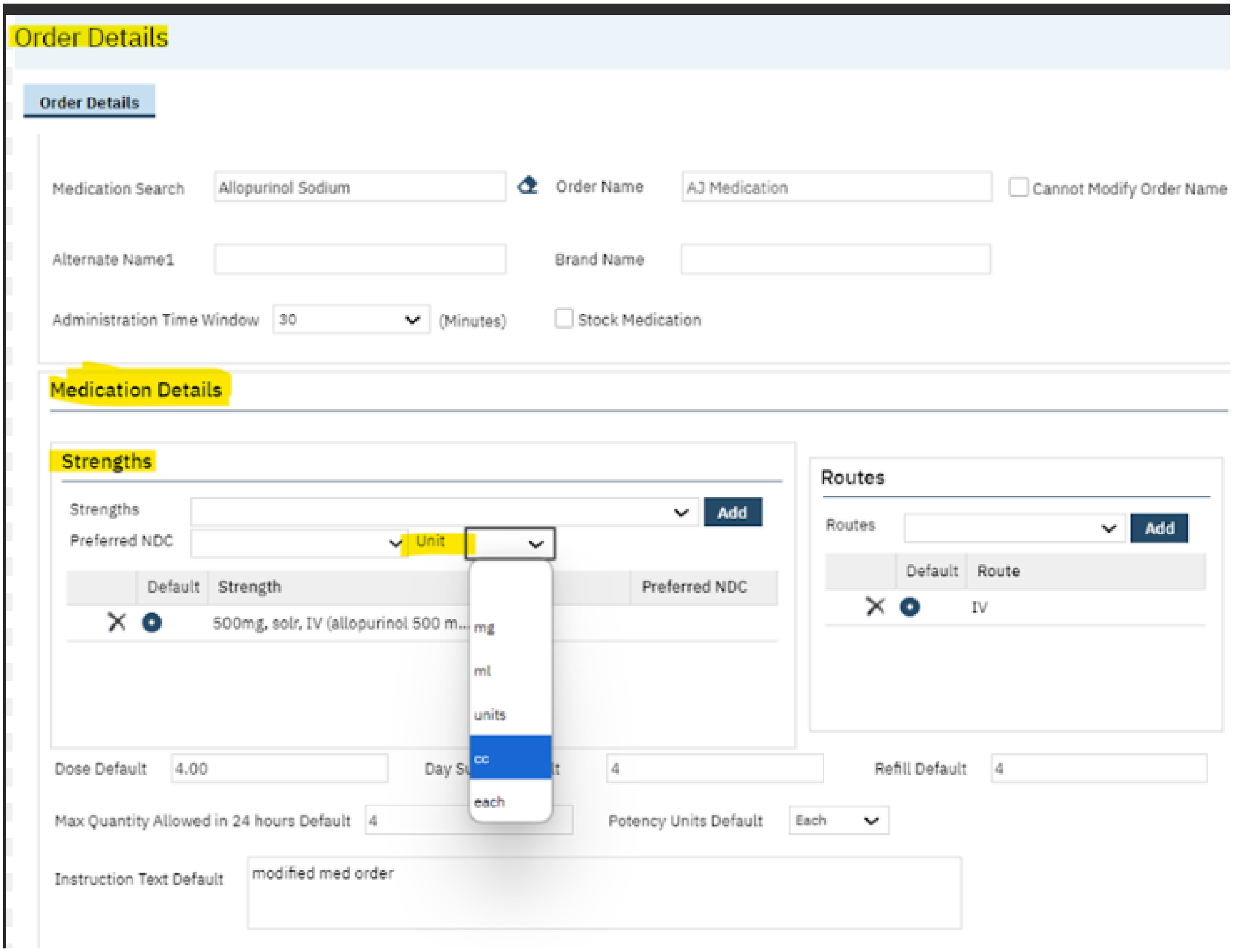
- **'New Button'** field is removed from the 'Frequencies' section.
- **'Medication Category'** field will be hidden in the Order Set Up screen.

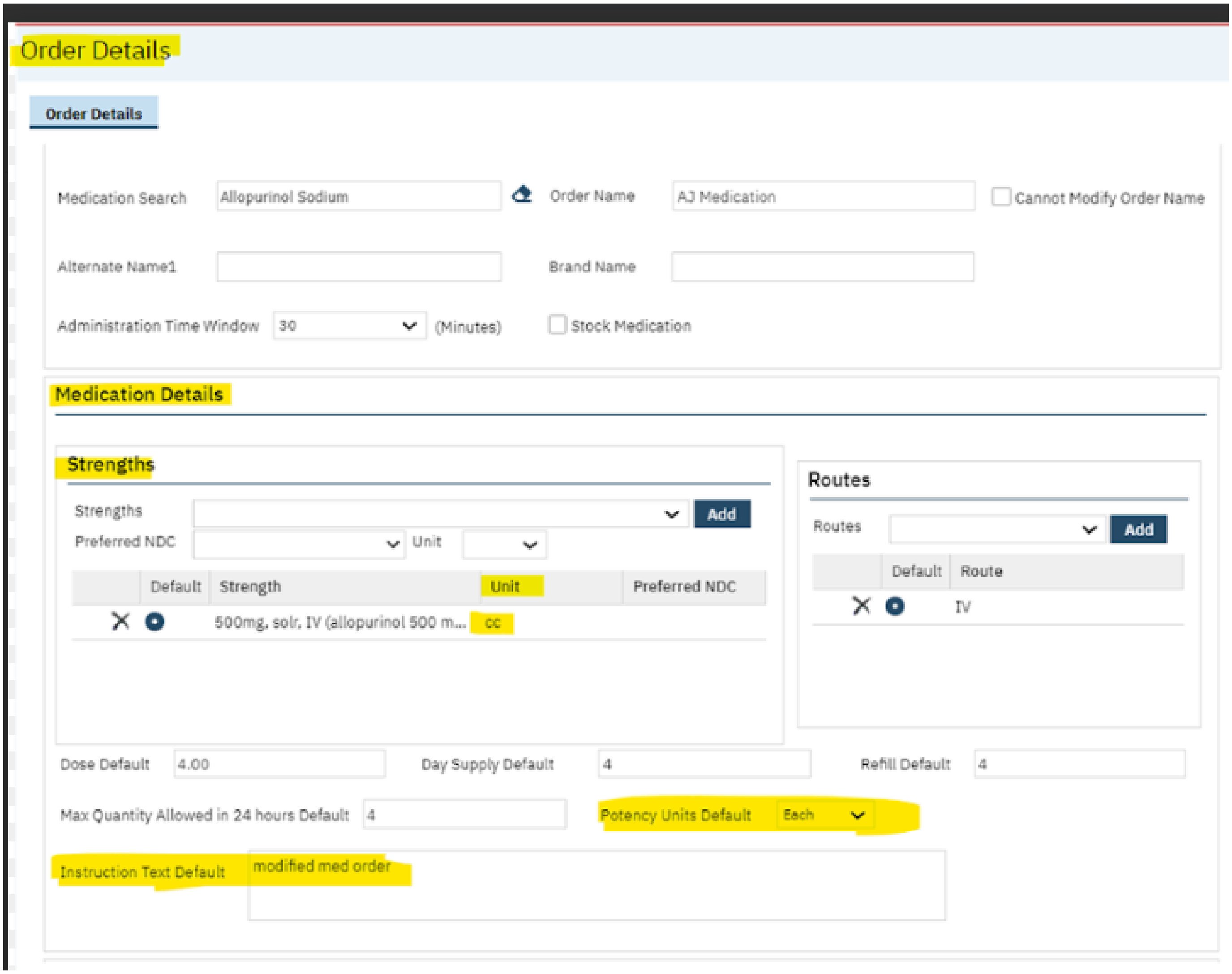
Client Order Screen mapping for Order and Order setup tabs:

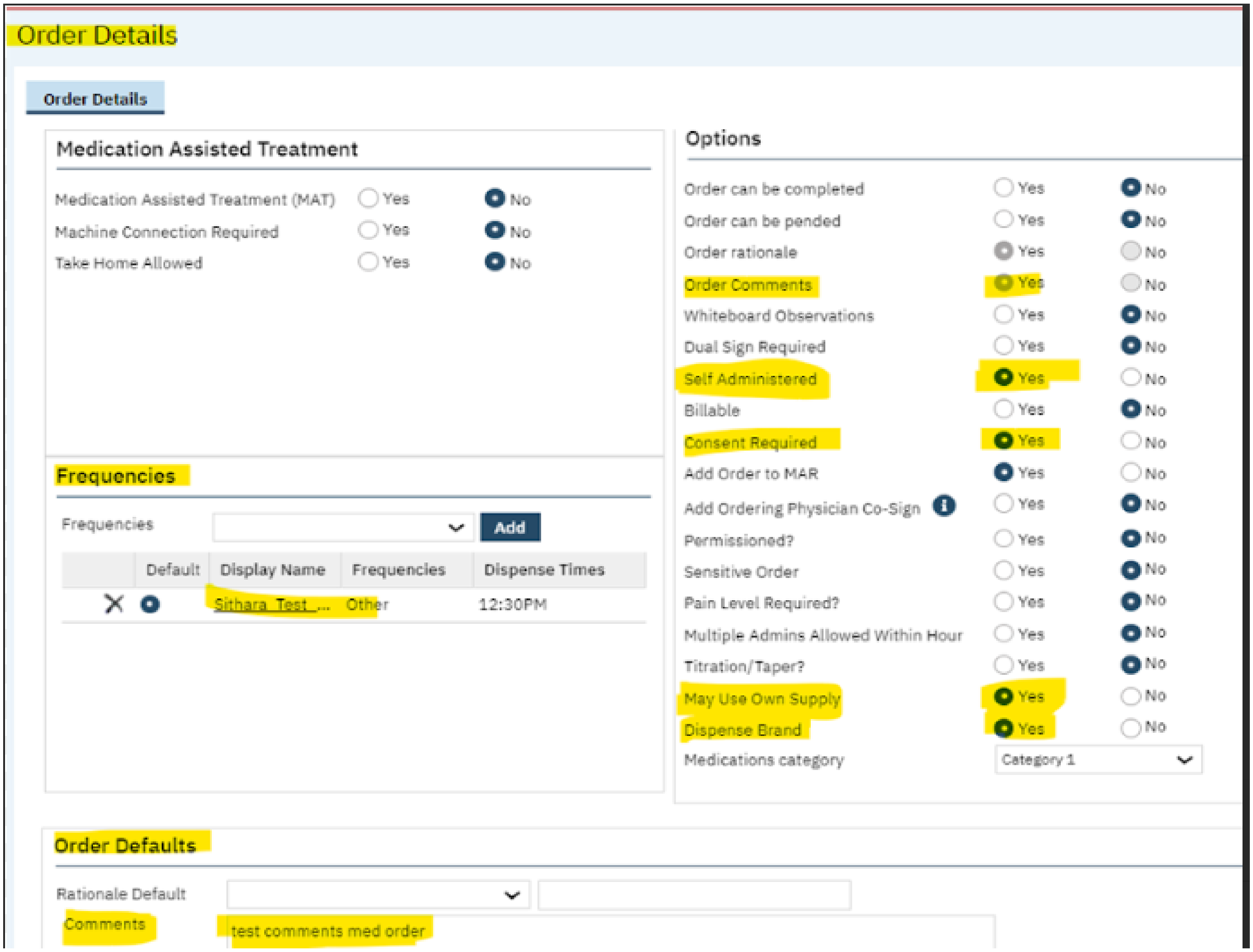


- A new default mapping has been implemented for the below fields for the Order Type: **Medication**




Order Details
Order Details
Medication Search
Allopurinol Sodium
Order Name
AJ Medication
Cannot Modify Order Name
Alternate Name1
Brand Name
Administration Time Window
30
(Minutes)
Stock Medication
Medication Details
Strengths
Strengths
Add
Preferred NDC
Unit
Default
Strength
Preferred NDC
500mg, solr, IV (allopurinol 500 m...
mg
ml
units
cc
each
Routes
Routes
Add
Default
Route
IV
Dose Default
4.00
Refill Default
4
Max Quantity Allowed in 24 hours Default
4
Potency Units Default
Each
Instruction Text Default
modified med order


Order Details
Order Details
Medication Search
Allopurinol Sodium
Order Name
AJ Medication
Cannot Modify Order Name
Alternate Name1
Brand Name
Administration Time Window
30
(Minutes)
Stock Medication
Medication Details
Strengths
Strengths
Add
Preferred NDC
Unit
Default
Strength
Unit
Preferred NDC
500mg, solr, IV (allopurinol 500 m...
cc
Routes
Routes
Add
Default
Route
IV
Dose Default
4.00
Day Supply Default
4
Refill Default
4
Max Quantity Allowed in 24 hours Default
4
Potency Units Default
Each
Instruction Text Default
modified med order



Ø **Unit**: A new field 'Unit' is added in the 'Medication Details Strengths' section. Unit values will be displayed in the dropdown based on the strength selection based on the existing logic. Upon selecting and adding the unit, the value will be inserted in the grid. This field will display only for 'Medication Order Type'.

This NEW Default field will map to Order – Unit field; Order Set – Unit field in Client Oreder screen.

Ø **Potency Units:** It is a single-select dropdown and this field in the 'Medication Details' section is only for 'Medication Order Type'.

This NEW Default field will map to Order – Potency Units; Order Set – Potency Units in Client Order screen.

Ø **Instruction Text Default**: This is a multi-line textbox and a free text up to 250 characters can be entered. This field in the 'Medication Details' section is only for 'Medication Order Type'.

This NEW Default field will map to Order – Instruction Text; Order Set – Instruction Text in Client Orders screen.

Ø **May Use Own Supply**: This is radio button with values 'Yes' and 'No' and this field in the 'Options' section is only for 'Medication Order Type'. If the value is 'Yes', then the 'May Use Own Supply' checkbox will be displayed as checked in the Order and Order Set tabs in Client Order screen. If the value is 'No', the checkbox will be displayed as unchecked.

Ø **Dispense Brand**: This is radio button with values 'Yes' and 'No' and this field in the 'Options' section is only for 'Medication Order Type'. If the value is 'Yes', then the 'Dispense Brand' checkbox will be displayed as checked in the Order and Order Set tab of Client Order. If the value is 'No', the checkbox will be displayed as unchecked.

Ø **Self Administered:** This is radio button with values 'Yes' and 'No' and this field in the 'Options' section is only for 'Medication Order Type'. If the value is 'Yes', then the 'Self Administered' checkbox will be displayed as checked in the Order and Order Set tab of Client Order screen. If the value is 'No', the checkbox will be displayed unchecked.

Ø **Consent Required:** This is radio button with values 'Yes' and 'No' and this field in the 'Options' section is only for 'Medication Order Type'. If the value is 'Yes', then the 'Consent Required' checkbox will be displayed as checked in the Order and Order Set tab of Client Order screen. If the value is 'No', the checkbox will be displayed as unchecked.
Ø **Comments:** When 'Order Comments = Yes' in the 'Options' section of Order Set Up screen, the 'Comments' textbox will be shown in the 'Order defaults' section and a free text up to 250 characters can be entered. If 'Order Comments = No', then the Comments textbox will be hidden.

This NEW Default will be mapped to Order – Comments; Order Set – Comments in Client Order screen.

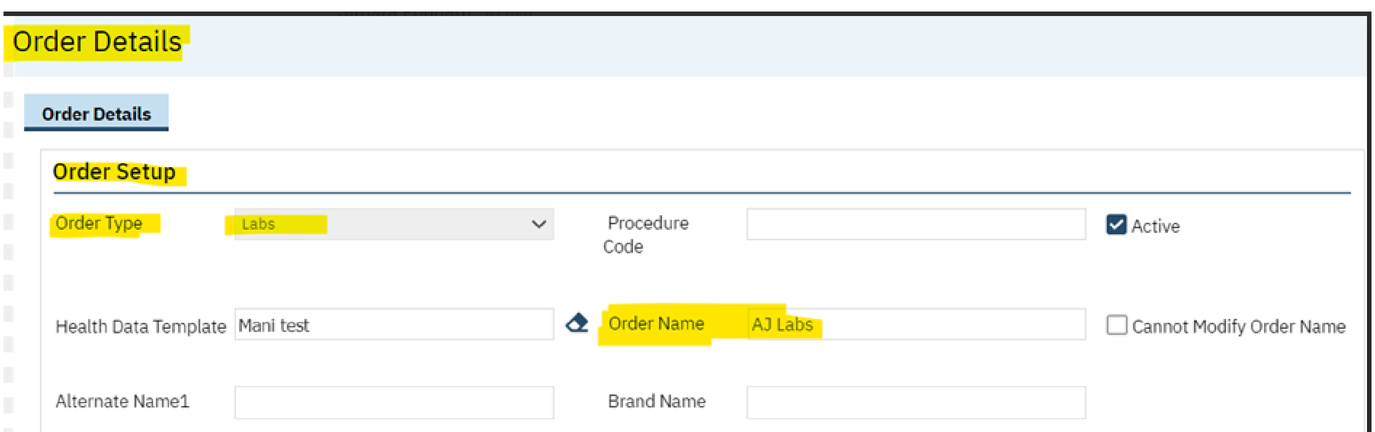
Ø **Frequencies:** User can set up the frequencies in the 'Order Template Frequencies screen' and this can be added from the 'Frequencies' dropdown in the Order Set Up screen.

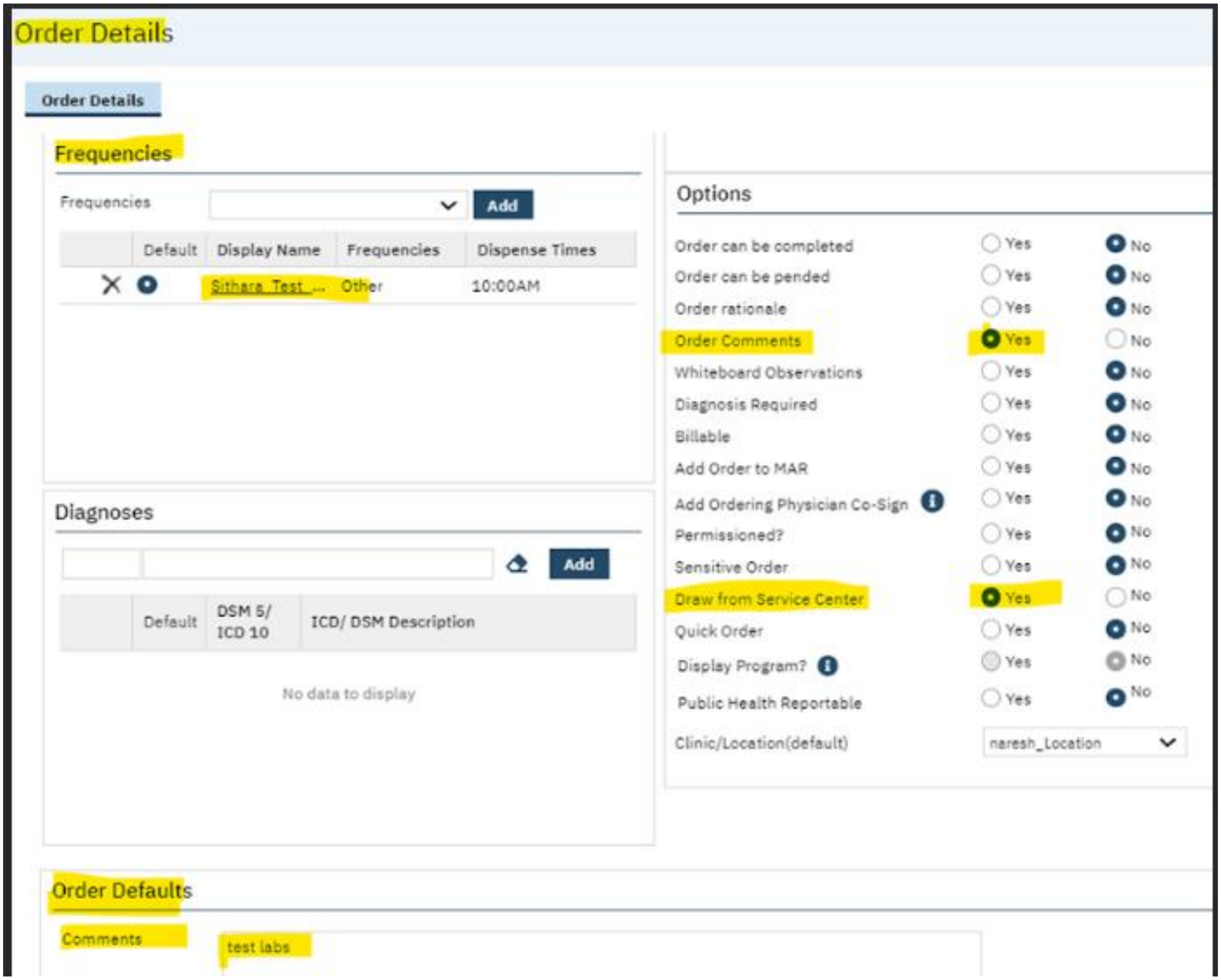
§ This field will be mapped to Frequency field in the Orders and Order Sets in Client Orders screen. If the frequency has default days, then the selected day(s) will be displayed in the Orders/Order Set tab in the Client Orders screen as 'Mon','Tue' next to the 'Frequency' field and it is a hyperlink.

§ '**New Button'** field is removed from the 'Frequencies' section.

Ø Updated the logic to display '**Medication Category'** field in the 'Options' section and this is only for 'Medication Order Type'.

- A new default mapping has been implemented for the below fields for the **Order Type: Labs.**





Ø **Draw From Service Center:** This is a radio button with values 'Yes' and 'No' and this field is in the 'Options' section of Lab order type. If the value is 'Yes', then 'Draw From Service Center' checkbox will be displayed as checked in Order tab and Order Set tab of Client Order screen. If the value is 'No', the field will be hidden.

Ø **Comments:** When 'Order Comments = Yes' in the 'Options' section of Order Set Up screen, the 'Comments' textbox will be shown in the 'Order defaults' section and a free text up to 250 characters can be entered. If 'Order Comments = No', then the Comments textbox will be hidden.

This NEW Default will be mapped to Order – Comments; Order Set – Comments in Client Order screen.

Ø **Frequencies:** User can set up the frequencies in the 'Order Template Frequencies screen' and this can be added from the 'Frequencies' dropdown in the Order Set Up screen.

§ This field will be mapped to Frequency field in the Orders and Order Sets in Client Orders screen. If the frequency has default days, then the selected day(s) will be displayed in the Orders/Order Set tab in the Client Orders screen as 'Mon','Tue' next to the 'Frequency' field and it is a hyperlink.

§ '**New Button'** field is removed from the 'Frequencies' section.

- When user creates an **'Order Set'** in 'Order Sets' screen and adds these orders to it, the default values from the Order Set Up screen will be initialized to the orders and these values can be seen on click of **'Set Default'** button.

- The default values will be displayed in the signed Client Order PDF based on the existing PDF document design.

Data Model Changes:

- Added below columns in the 'Orders' table.
  - Ø CommentsText
  - Ø InstructionText
  - Ø MayUseOwnSupply
  - Ø PotencyUnit
  - Ø DispenseBrand
  - Ø RationaleOtherText

- Added below columns in the 'OrderSetAttributeDefaults' table.
  - Ø MaySelfAdminister
  - Ø ConsentIsRequired
  - Ø MayUseOwnSupply
  - Ø DispenseBrand
  - Ø DrawFromServiceCenter

- Added below columns in the 'OrderTemplateFrequencies' table.
  - Ø DaysOfWeek

~~Outlook Sync~~

~~Reference No~~	~~Task No~~	~~Description~~
~~211~~	~~Core Bugs # 129105~~	~~Scheduled Recurrent services deleted in SmartCare are not being removed in Outlook Calendar.~~

~~**Author:** Aishwarya Bommaklar~~

~~211: Core Bugs # 129105: Scheduled Recurrent services deleted in SmartCare are not being removed in Outlook Calendar.~~

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

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

~~**Navigation Path 1:** 'Client' – 'Services List' page – Click on 'New' icon – Enter all the required details – Click on 'Save' icon – Click on 'Make Recurring' icon – Select the 'Recurrence pattern' – Click on 'OK'.~~

~~**Navigation Path 2:** 'Client' – 'Services List' page – Select any one of the above recurrence service – Click on 'Delete' icon – Select 'Just this service on this date for this clients scheduled in this service.' – Click on 'OK'.~~

~~**Navigation Path 3:** 'My Office' – 'Groups' – Click on 'Group Name' hyperlink – Click on 'Schedule' tab – Click on 'Create New Group Service' button – Select the 'Clients' and Enter the 'Date of Service' – Click on 'OK' – Enter all the required fields – Click on 'Save' icon – Click on 'Make Recurring' icon – Select the 'Recurrence pattern' – Click on 'OK'.~~

~~**Navigation Path 4:** 'My Office' – 'Group Services' – Select any one of the above 'Recurrence Group Service' – Click on 'Delete' icon – Select 'Just this service on this date for this clients scheduled in this service.' – Click on 'OK'.~~

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

~~Before this release, here was the behaviour. When the user deleted the 'Recurrence Service' or 'Recurrence Group Service' in 'SmartCare', it was not removed from the Outlook Calendar.~~

~~With this Release, the above-mentioned issues have been fixed. Now, when the user deletes the 'Recurrence Service' or 'Recurrence Group Service' in 'SmartCare', it is removed from the Outlook Calendar as well.~~

Payments/Adjustments

Reference No	Task No	Description
212	Core Bugs # 128711	835 Electronic Payment is not posting adjustments and transfers.
213	Core Bugs # 129198	Payments/Adjustments:Error message is displayed when trying to modify the existing payment.
214	Core Bugs # 129185	The 'Refund/Adjustment History' dropdown arrows being cut off in the 'Refund/ Adjustment' tab.

Author: Sahana Gururaja

212: Core Bugs # 128711: 835 Electronic Payment is not posting adjustments and transfers.

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

Prerequisites:
1. Mark the 'Active' column of the required adjustment code as 'N' in the 'GlobalCodes' table.

2. Process an 835 file which has a 'Remark Code' along with the 'Adjustment Code' that is specified in the 'ERProcessing Template Rules', and the 'Adjustment Code' 'Active =N' through the 'Payments/Adjustments' screen.

Navigation Path: '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 user processed an 835 ERFile, an AdjustmentCode needed to have Active = 'Y' in the GlobalCodes table to be used by the 835 process to post adjustment/transfer.

With this release, the above mentioned condition is removed now. The 835 files will post adjustments as defined in the 'Er Processing Template Rules' , along with 'Remark Codes'. Now, 'Active=Y' is not mandatory to post adjustment from 835 files.

Author: Yashas Kydalappa

213: Core Bugs # 129198: Payments/Adjustments: Error message is displayed when trying to modify the existing payment.

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

Navigation Path: 'My Office'- 'Payments/Adjustments' - 'Payments/Adjustments' list page - click on 'New EOB/Payment/Adjustment' button - 'Payment/Adjustment Posting' pop-up.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The system was throwing the below error when trying to modify the existing payment records under 'Payment/Adjustment Posting' pop-up and unable to proceed.

Error: Input String was not in the correct format.

With this release, the above-mentioned issue is resolved. Now, when modifying the existing payment records, the above-mentioned error is not displayed, and the user is able to proceed further.

Author: Saravanakumar Nagarajan

214: Core Bugs # 129185: The 'Refund/Adjustment History' dropdown arrows being cut off in the 'Refund/ Adjustment' tab.

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

Navigation Path: My Office -- 'Payments/Adjustments' – 'Payments/Adjustments' list page -- Click on any value hyperlink in the 'Date Received' column -- 'Payment/Adjustment Details' screen -- Click on 'Refund / Adjustment' tab -- 'Refund/Adjustment History' section.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Refund / Adjustment' tab of 'Payment/Adjustment Details' screen, the 'Refund/Adjustment History' section drop down arrow was cut off at bottom. So, the user was unable to see the last row of the data.

With this release, the above-mentioned issue has been resolved. Now, the 'Refund/Adjustment History' section drop down arrow is displayed correctly, and the user can use the arrows to see the last row of the data.

Performance and Scalability Improvements

Reference No	Task No	Description
215	Core Bugs # 128807	Stored Procedure optimization for Performance improvement in List pages, Detail Pages and widgets etc.
216	Core Bugs # 128895	Performance issue while loading Caseload Reassignment list page
217	Core Bugs # 128542	Performance issue
218	Core Bugs # 128717	Frequent Deadlocks are occurring in Customer environments due to the SP - ssp_SCDeleteListPagesData.
219	Core Bugs # 128956	Performance issue with Author Dropdown in Documents and Service/Note.
220	Core Bugs # 128961	Performance issue while cosigning documents and Services/Notes.
221	EII # 126063	Hotkey/Keyboard Shortcut Descriptions

Author: Munish Sood

215. Core Bugs # 128807: Stored Procedure optimization for Performance improvement in list page, details pages and widgets etc.

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

Navigation Path: All screens as mentioned below.

Functionality 'Before' and 'After' release:

With this release, the stored procedures are optimized to improve the performance of the below mentioned list screens, Detail screens, Widgets etc.

- Group Services
- Services/Notes
- Charges and Claims
- Reception
- Services (Client)
- My Services
- Dashboard Widget - Appointments for Today
- Groups - Schedule Service
- Groups
- All list pages where we have Program drop down as Filter criteria.
- Client Problems
- All list pages where we have Staff drop down as Filter criteria
- Client Orders
- Disclosure
- Dashboard Widget - Documents
- My Documents
- Dashboard Widget - Services For Today
- Dashboard Widget - Services for Today with Past Scheduled
- Dashboard Widget - Tracking Widget
- Client Account

- Dashboard Widget - Service Errors
- Ledger - Client Account
- Programs (Administration)
- Flow Sheet
- Client Search
- My Caseload
- Team Scheduling
- Scanned Medical Records.

Author: Niroop Hassan

216: Core Bugs # 128895: Performance issue while loading Caseload Reassignment list page

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

Navigation Path: Go Search — Caseload Reassignment List Page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Caseload Reassignment list page was taking longer time to load.

With this Release, the above mentioned issue has been resolved. Now, Caseload Reassignment page is loading without any performance issue.

Author: Aishwarya Bommaklar

217: Core Bugs # 128542: Performance issue.

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

Navigation Path 1: My Office - Group Services – 'Group Services' list page.

Navigation Path 2: My Office – Staff Calendar.

Navigation Path 3: My Office – Bed Census – 'Bed Census' list page.

Navigation Path 4: Client – Services – 'Services' list page.

Navigation Path 5: My Office -- Reception/Front Desk – 'Reception/Front Desk' list page.

Navigation Path 6: My Office – Dashboard – 'Services Needing Attention' widget.

Navigation Path 7: My Office – Dashboard – 'Services for Today with Past Scheduled' widget

Navigation Path 8: My Office – Dashboard – 'Services For Today' widget.

Navigation Path 9: My Office – Appointment Search – 'Appointment Search' screen

Functionality 'Before' and 'After' release:

With this release, the stored procedures are optimized to improve the performance in the following screens and widgets:

- Group Service List page
- Staff Calendar
- Bed Census List page
- Client Services List Page
- Reception/Front Desk list page
- Services Needing Attention Widget
- Services for Today with Past Scheduled widget
- Services For Today widget

Also, an Index is added for StaffId, EndTime, AppointmentType, ShowTimeAs, LocationId, RecurringAppointment, RecurringAppointmentId, and RecordDeleted columns in the Appointments table.

Author: Sunil Belagali

218: Core Bugs # 128717: Frequent Deadlocks are occurring in Customer environments due to the SP - ssp_SCDeleteListPagesData.

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

Navigation Path: N/A

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. Deadlocks occurred frequently in Customer environments due to the Store Procedure - 'ssp_SCDeleteListPagesData'. This was causing slowness in performance of the 'SmartCare' application.

With this release, the above-mentioned issue has been fixed. Now, a SQL job(which runs at 5:00 AM everyday) is created to Delete Previous 2 day's session data from the table- ListPagePMAppointments- which is present in Store Procedure - 'SSP_SCDELETELISTPAGEPMAPPOINTMENTS'. With this, the performance of the 'SmartCare' application has significantly improved.

Table present in Store Procedure 'SSP_SCDELETELISTPAGEPMAPPOINTMENTS': - ListPagePMAppointments

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Author: Kiran Tigarimath

219: Core Bugs # 128956: Performance issue with Author Dropdown in Documents and Service/Note.

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

Navigation Path 1: Go Search - Select Client - Service/ Note (Client) - Service Note Screen.

Navigation Path 2: Go Search - Select Client - Documents - Select any Documents.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The users experienced slowness while using Author drop down in Documents and Service/Note screen.

With this release, the above-mentioned issue has been resolved. Now, the Author drop down performance is improved in Documents and Service/Note screen.

Author: Kiran Tigarimath

220: Core Bugs # 128961: Performance issue while cosigning documents and Services/Notes.

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

Navigation Path: Login -- 'Client' -- 'Documents'

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The users experienced slowness while loading pdf after cosigning documents, due to accumulation of PDF bytes in Redis server.

With this release, the above-mentioned issue is resolved. Now, the performance is improved by removing the PDF bytes from Redis server, for loading pdf after cosigning documents.

Author: Sunil Belagali

221: EII # 126063: Hotkey/Keyboard Shortcut Descriptions.

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

Navigation Path: Login to SmartCare application – 'System Keyboard Shortcut Configuration' screen.

Functionality 'Before' and 'After' release:

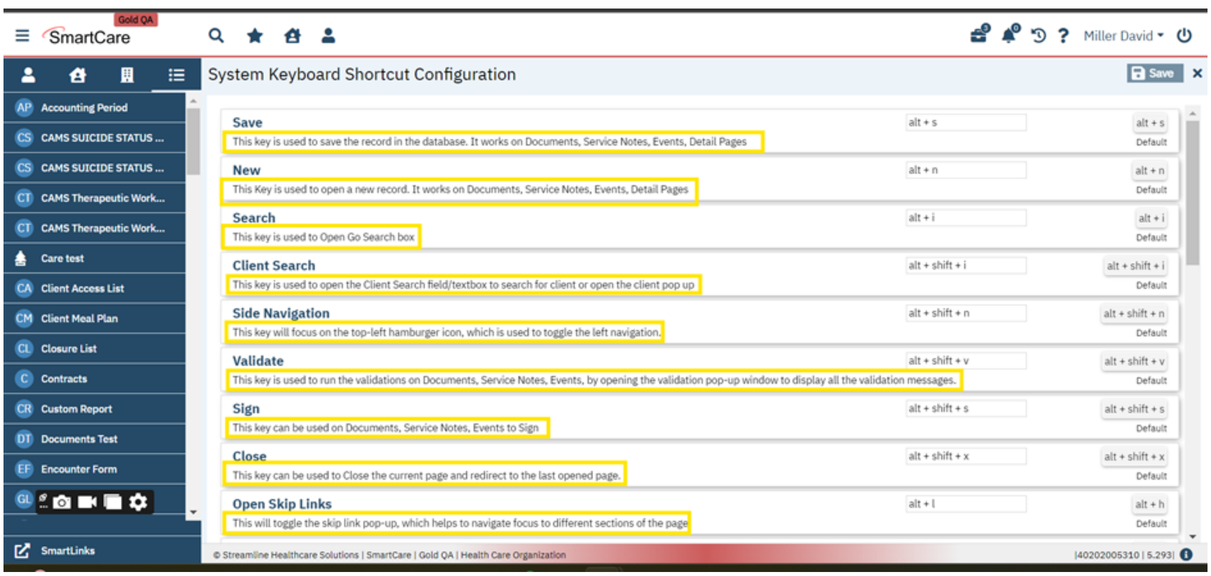
Purpose: To update the shortcut key's description to reduce the need to use mouse while navigating through screens, etc. This is to support the Americans with Disabilities Act (ADA) Standards.

With this release, the description has been added to the below mentioned 'Hotkeys/Keyboard Shortcuts' in 'System Keyboard Shortcut Configuration' screen.

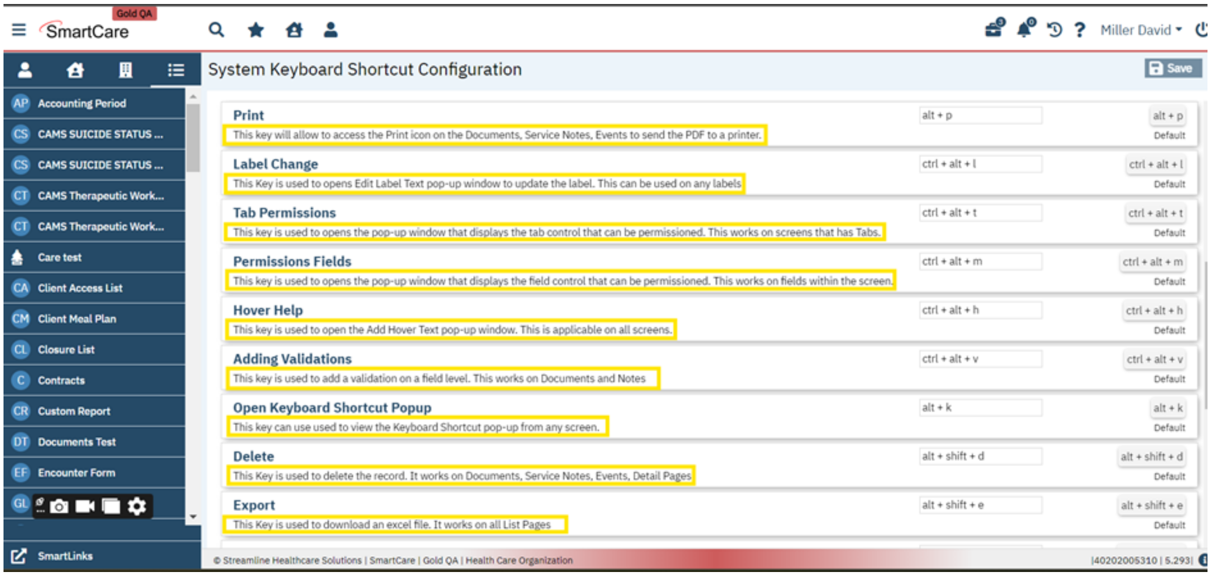
- Save
- New
- Search
- Client search
- Side Navigation

- Validate
- Sign
- Close
- Open Skip Links
- Print
- Label Change
- Tab Permissions
- Permission Fields
- Hover Help
- Adding Validations
- Open Keyboard Shortcut Popup
- Delete
- Export
- Favorite
- New Favorite
- Information
- Smartview
- Go To
- Help
- Configuration
- View Report

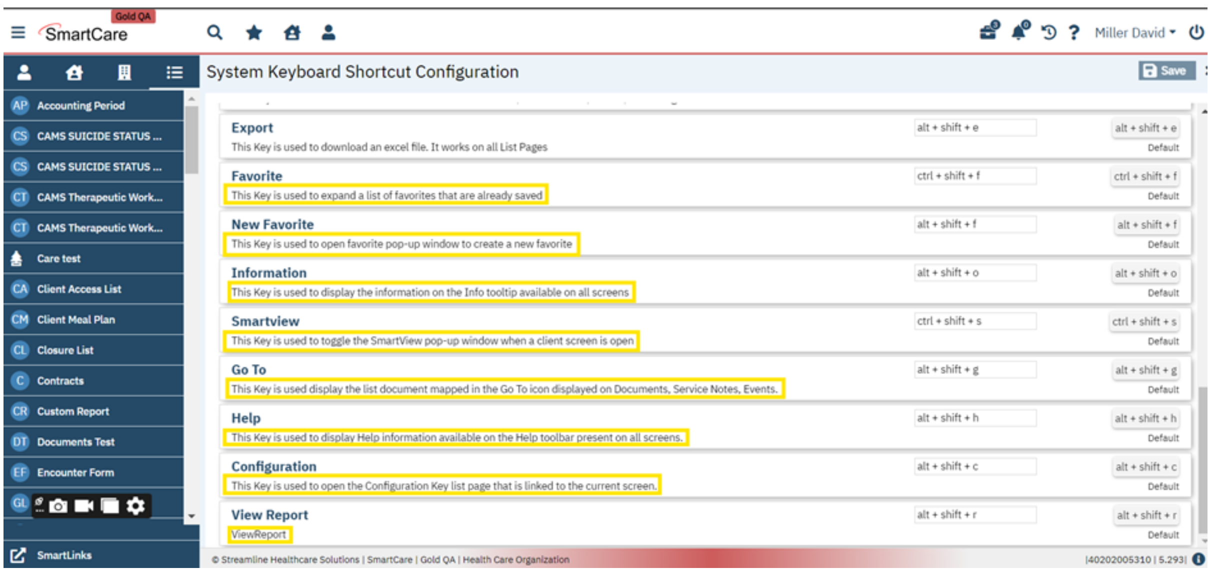
Refer the Screen shots of the Descriptions added to 'Hotkeys/Keyboard Shortcuts':
1) From 'Save' to 'Open Skip Links'



2) From 'Print' to 'Export'



3) From 'Favorite' to 'View Report'



Performance optimization

Reference No	Task No	Description
222	Core Bugs # 129253	ssp_CMListPageClientClaimsData - Optimisation - Client Claims
223	Core Bugs # 129233	Performance issue in the Import 837 List page
224	Core Bugs # 129267	Performance issue in the Provider contracts list page

225	Core Bugs # 129245	ssp_CMGetBillingCodeValidMembers - Optimisation
226	Core Bugs # 129338	Performance issue in the 'Services From Claims' list page

Author: Renuka Gunasekaran

222: Core Bugs # 129253: ssp_CMListPageClientClaimsData - Optimisation - Client Claims

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

Navigation Path: 'Client' --'Claims'.

Functionality Before and After release:

Before this release, here was the behavior. The Client Claims screen performance was slow.

With this release, the performance of the Client Claims screen has been improved by optimizing the corresponding SP ssp_CMListPageClientClaimsData and now within 1 sec the records in the client claims screen are loading.

Author: Renuka Gunasekaran

223: Core Bugs # 129233: Performance issue in the Import 837 List page.

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

Navigation Path: My Office – 837 Import -- Import 837 List.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There was a performance issue in the Import 837 List page.

With this release, the above-mentioned issue is resolved. Now, the Stored procedure has been optimized to improve the performance of the Import 837 List page.

Author: Renuka Gunasekaran

224: Core Bugs # 129267: Performance issue in the Provider contracts list page.

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

Navigation Path: Go search-Provider Contracts(My office).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There was a performance issue in the Provider contracts list page, which was causing slowness.

With this release, the above-mentioned issue has been resolved. Now, ssp_ListPageCMProviderContracts is optimized to improve the performance of the Provider Contracts list page.

Author: Renuka Gunasekaran

225: Core Bugs # 129245: ssp_CMGetBillingCodeValidMembers – Optimisation.

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

Navigation Path: Login -- 'Administration' --' Billing codes'

Functionality 'Before' and 'After'release:

Before this release, 'here was the behavior. The following issues have been addressed:

- ssp_CMGetBillingCodeValidMembers was found running for a longer time**.**
- The 'Client' filter in the billing code list page was pulling the values from the 'ContractRates' table.

With this release, the above-mentioned issues have been fixed and are working fine.

- ssp_CMGetBillingCodeValidMembers has been optimized to reduce the running time and the performance of the billing code list page has been improved.
- The 'Client' filter in the billing code screen pulls the value from the 'ContractRateClients' table

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Author: Renuka Gunasekaran

226: Core Bugs # 129338: Performance issue in the 'Services from Claims' list page.

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

Navigation Path: 'My Office' -- 'Services From Claims' -- 'Services From Claims' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. There was a performance issue in the 'Services From Claims' list page.

With this release, the above-mentioned issue is resolved. Now, the ssp_CMListPageServiceClaims is optimized to improve the performance of the 'Services from Claims' list page.

Placements

Reference No	Task No	Description
227	Core Bugs # 129398	Placement History: The Child Hyperlink is redirected to the incorrect screen.

Author: Shivakanth Moger

227: Core Bugs # 129398: Placement History: The Child Hyperlink is redirected to the incorrect screen.

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

Navigation Path: 'My Office' - 'Placement History' list page -Click on the 'Child' hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user clicked the 'Child' hyperlink text on the Placement History 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 clicks on the 'Child' hyperlink text on the Placement History list page, it is redirected to the Client Information (c) screen.

Plans

Reference No	Task No	Description
228	Core Bugs # 128831	Plan Template Not Pulling in All Standard Billing Codes.
229	EII # 127819	Added new values to the 'Action if rule is broken' dropdown and implemented the 'Adjustment code' dropdown

Author: Yashas Kydalappa

228: Core Bugs # 128831: Plan Template Not Pulling in All Standard Billing Codes.

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 'Use this Plan as a Template' button – 'Plan Billing Code' pop-up.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. 'Use this Plan as a Template' was not showing all of the active billing codes in grid, when filtered with 'Use Standard Billing Codes' template.

With this release, the above mentioned issue has been resolved. Now all of the active billing codes will be displayed under grid, when the billing codes tab is filtered with 'Use this Plan as a Template'.

Author: Yashas Kydalappa

229: EII # 127819: Added new values to the 'Action if rule is broken' dropdown and implemented the 'Adjustment code' dropdown.

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

Navigation Path: 'Administration' -- 'Billing Setup' -- 'Plans' -- 'Plans' list Page – click on plan name hyperlink or new button 'Plans Details' screen -- 'Rules' tab -- 'Rule Generation' section.

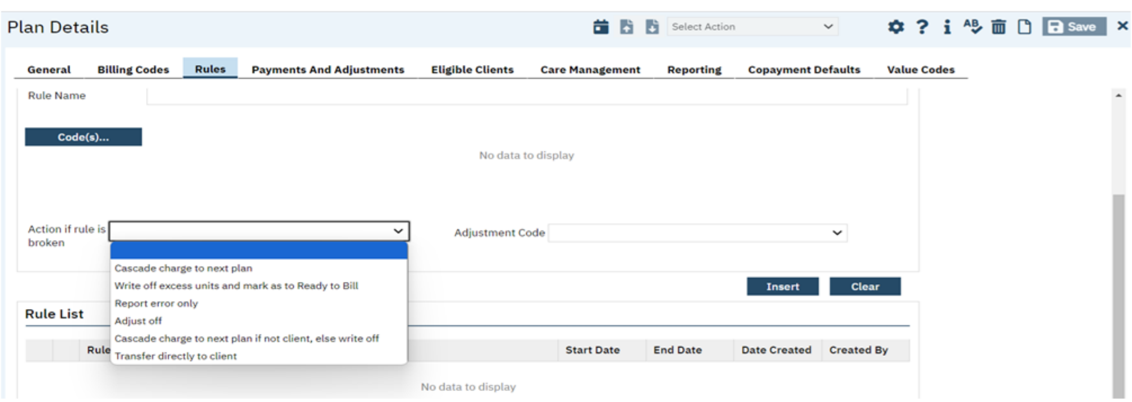
Functionality 'Before' and 'After' release:

Purpose: To Add the new values to the 'Action if rule is broken' dropdown & to add the Adjustment Code dropdown for the plan rule.

With the release, the following changes have been implemented.

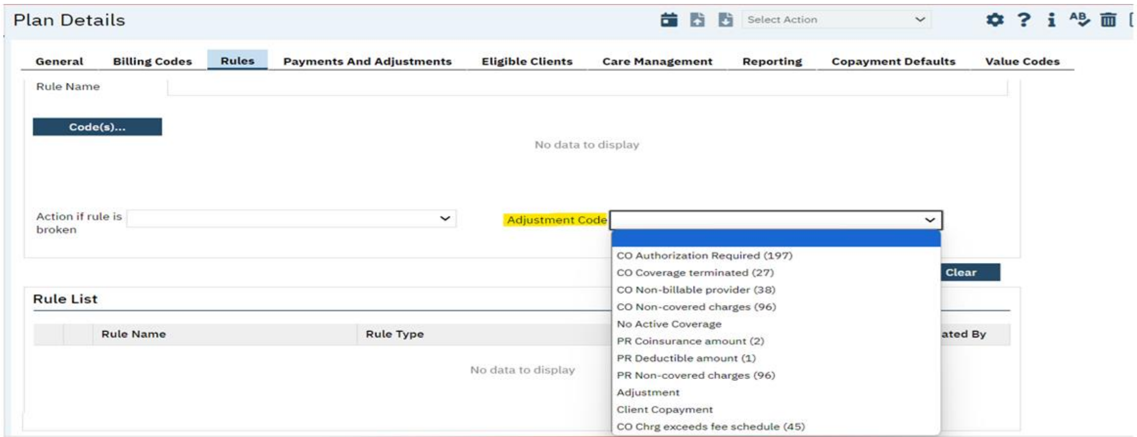
The below values are added to the 'Action if the rule is broken' dropdown along with the existing values under the 'Rules tab of the 'Plan Details' screen. The Initiation for the dropdown values are from the globalcode category 'RULEVIOLATIONACTION'.

Plan Details screen



The 'Adjustment Code' dropdown has been implemented next to the 'Action if rule is broken' dropdown.

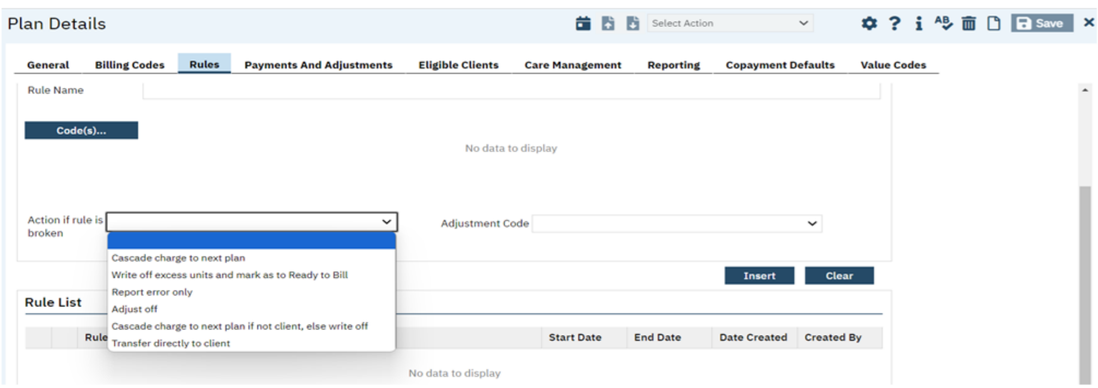
The 'Adjustment Code' dropdown field will be displayed only for these dropdown values: 'Cascade charge to next plan', 'Write off excess units and mark as to Ready to Bill', 'Adjust off', 'Cascade charge to next plan if not client, else write off', 'Transfer directly to client' **options except "Report error only".**



The Initiation for the 'Adjustment Code' dropdown values are from the globalcode category 'ADJUSTMENTCODE'.

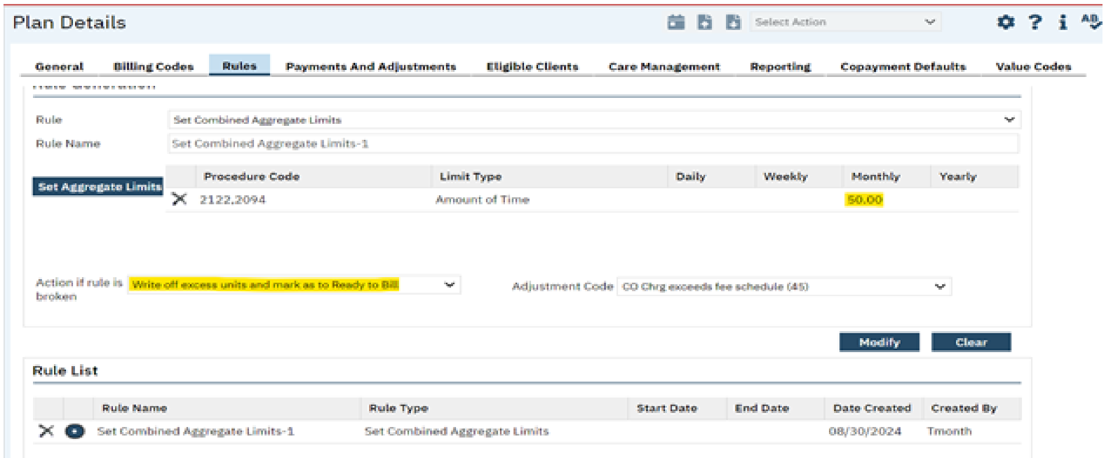
Action if rule is broken: This is a dropdown containing with below dropdown values:

1. **Cascade charge to next plan:** This is an existing dropdown value, If this value is selected under 'Primary Coverage Plan' , then the charges will cascade to the next eligible coverage plan.



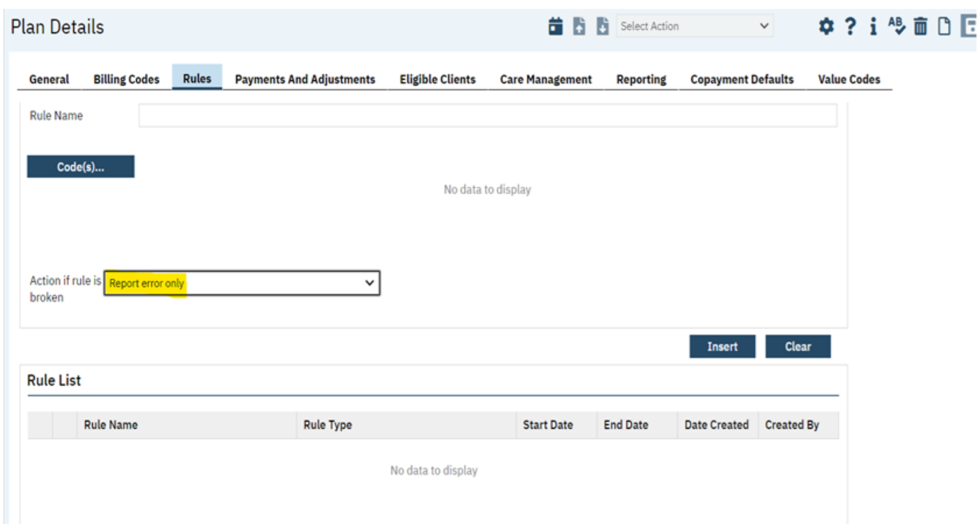
2. **Write off excess units and mark as to Ready to Bill:**

The new '**Write off excess units and mark as to Ready to Bill'** dropdown value is added to the Action if rule is broken' dropdown field. if this value is selected along with the 'Set Combined Aggregate Limits' plan rule to create a charge, when the 'Ready to Bill' job runs, then the system will calculate the charge amount till the cap limit and excess charge amount are written off and the charge status will set with 'Ready to Bill'.



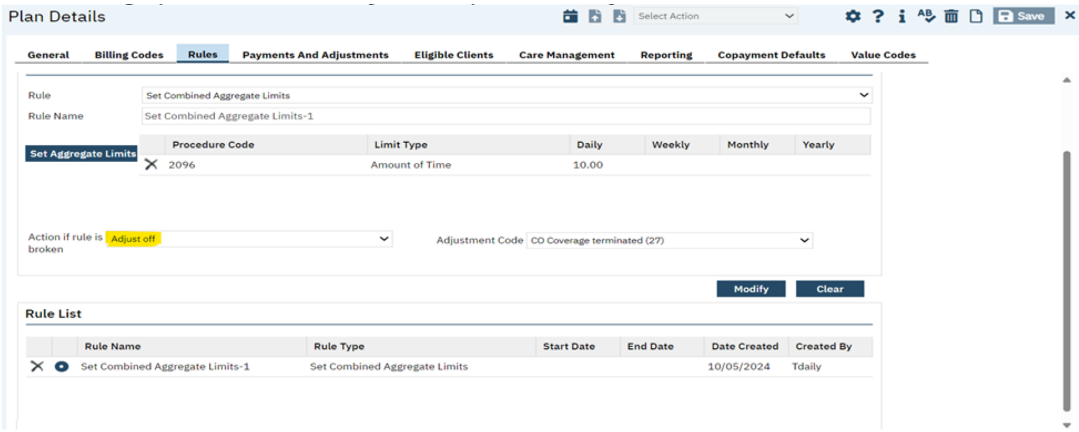
3. **Report Error Only:**

- The new '**Report Error Only'** dropdown value is added to the 'Action if rule is broken' dropdown field. The system will report the errors when the 'Ready to Bill' job runs for the charge if it has any errors.
- The 'Adjustment Code' dropdown will not be displayed if the 'Report Error Only' has been selected.



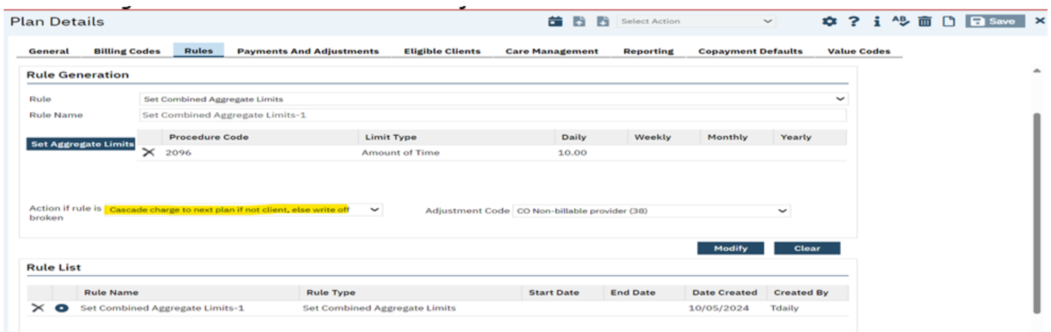
4. Adjust off:

The new 'Adjust off' dropdown value is added to the 'Action if rule is broken' dropdown field. The system will write off the total charge amount when the 'Ready To Bill' job runs, if the coverage plan has been saved with the 'Adjust Off' option.



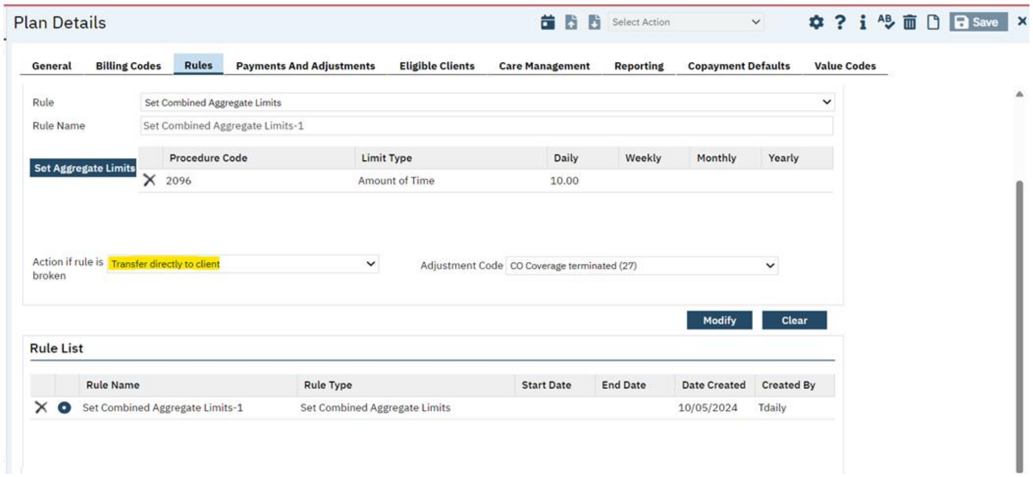
5.Cascade charge to next plan if not client, else write off:

This new '**Cascade charge to next plan if not client, else write off'** dropdown value is added to the 'Action if rule is broken' dropdown field. If the system finds another eligible coverage plan, then the charge amount will transfer to the secondary coverage plan. If there is no secondary coverage plan has been mapped, then the charges will be written off.



6.Transfer directly to client:

This new 'Transfer directly to client' dropdown value is added to the 'Action if rule is broken' dropdown field. The system will directly transfer the charge amount to the client when the 'Ready to Bill' job runs, even though the initially charge has been created to the coverage plan.



Data Model Changes: Added a new 'AdjustmentCode' column in the 'CoveragePlanRules' table.

~~Primary Care~~

~~Reference No~~	~~Task No~~	~~Description~~
~~230~~	~~Core Bugs # 129302~~	~~Primary Care Appointments are not Saving on Correct Provider Name.~~
~~231~~	~~Core Bugs # 129116~~	~~Primary Care: Mode of delivery is not displaying on the EM Code Pop-up.~~
~~232~~	~~EII # 127410~~	~~E&M Code pop up changes - Adding Location and Mode of Delivery to Add-on Code Screen~~

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

~~230: Core Bugs # 129302: Primary Care Appointments are not Saving on Correct Provider Name.~~

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

~~**Navigation Path:** My Office -- My Calendar -- 'My Calendar' screen -- Click on 'Click to Create New Primary Care Entry' icon -- 'New Primary Care Entry' popup -- select 'Provider Name' -- Enter all the required details -- Click on 'OK' button~~

~~**Functionality 'Before' and 'After' release:**~~
~~Before this release, here was the behavior. In the 'New Primary Care Entry' popup, when the user tried to create Primary Care Appointments, the Primary Care Appointments were not saved to the Provider Name selected, instead saved to the calendar of the logged in user.~~

~~With this release, the above-mentioned issue has been resolved. Now, the Primary Care Appointments are saved to the correct Provider Name when the user creates the Primary Care Appointments.~~

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

~~231: Core Bugs # 129116: Primary Care: Mode of delivery is not displaying on the EM Code Pop-up.~~

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

~~**Navigation Path 1:** 'My Office' --- 'My Calendar' screen – Select a client --- New Primary care appointment - Click on 'Ok' button – Do not select ''Mode of Delivery' — Click on 'Save' button.~~

~~**Navigation Path 2:** 'My Office' --- 'My Calendar' screen – Select a client --- New Primary care appointment - Click on 'Ok' button – Select a 'Mode of Delivery' value ---Click on 'Save' button 'Client' - 'Client Summary (Primary Care)' screen --- Click on 'Quick Note Status' icon (on the left side of date hyperlink) - Select a template - Click 'Ok' button - Redirects to Medical Progress Note - Click on 'Sign' button --- 'E&M Code' Pop-up --- 'Mode of Delivery' field.~~

~~**Navigation Path 3:** 'Client' – 'Medical Progress Note' screen --- Click on 'New' icon – Enter any required data --- Click on 'Save/Sign' button --- 'E&M Code' Pop-Up' displays - Do not select ''Mode of Delivery' in the dropdown field --- Click 'Ok' button.~~

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

~~Before this release, the user was able to sign the 'Medical Progress Note' even if 'Mode of Delivery' field value was not selected since it was not a required field.~~

~~With this release, the above-mentioned issue has been resolved and implemented the below changes in 'Primary Care Appointment' pop-up and 'E&M Code' Pop-up.~~

~~If the Mode of Delivery field is a mandatory field while scheduling a Primary Care Appointment, then the below validation will be displayed in the 'Primary Care Appointment Pop-Up', if this field is left blank on save.~~

~~**Validation Message: *"Please select Mode of Delivery".***~~

~~The selected Mode of Delivery field from the Primary Care Appointment pop-up, will be initialized to the 'Mode of Delivery' field in the 'E&M Code' Pop-up of Medical Progress Note, while navigating from the scheduled appointment in 'Client Summary (Primary Care)' screen.~~

~~When the user creates and signs a Medical Progress Note, the below validation will be displayed in the 'EM Code Pop-Up' if 'Mode of Delivery' field is left blank.~~

~~**Validation Message:** *"Please select Mode of Delivery".*~~

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

~~232: EII # 127410: E&M Code pop up changes - Adding Location and Mode of Delivery to Add-on Code Screen.~~

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

~~**Navigation Path 1:** My Office -- My Calendar -- 'My Calendar' screen -- Click on 'Click to Create New Primary Care Entry' icon -- 'New Primary Care Entry' popup -- select a Mode of Delivery' -- Enter all the other required details -- Click on 'OK' button.~~

~~**Navigation Path 2:** Go Search – Client Summary (PC) (Client) screen --- Click on the 'Quick Note Status' icon near the Date hyperlink --- Select a 'Template' and click 'Ok' button --- 'Medical Progress Note' screen --- Click on 'Save/Sign' button --- E&M Code' pop-up – Go to 'Add-On Codes' tab – Select required data --- Click on 'Insert' button.~~

~~**Navigation Path 3:** 'Client' --- Go search 'Medical Progress Note' screen --- Select a 'Template' and click 'Ok' button --- Click on 'Save/Sign' button --- 'E&M Code' pop-up – Go to 'Add-On Codes' tab – Select required data --- Click on 'Insert' button.~~

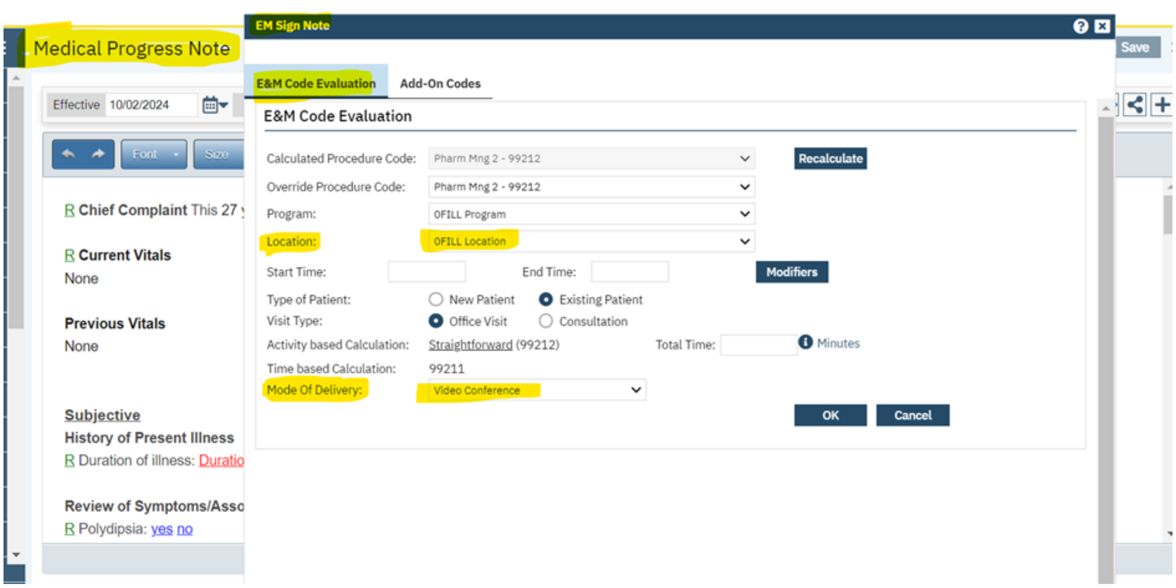
~~**Functionality 'Before' and 'After' release:**~~

~~**Purpose:** To make sure that the Location and Mode of Delivery of the Add-On Codes Services can be captured and it can be different than the parent Service in the Service tab.~~

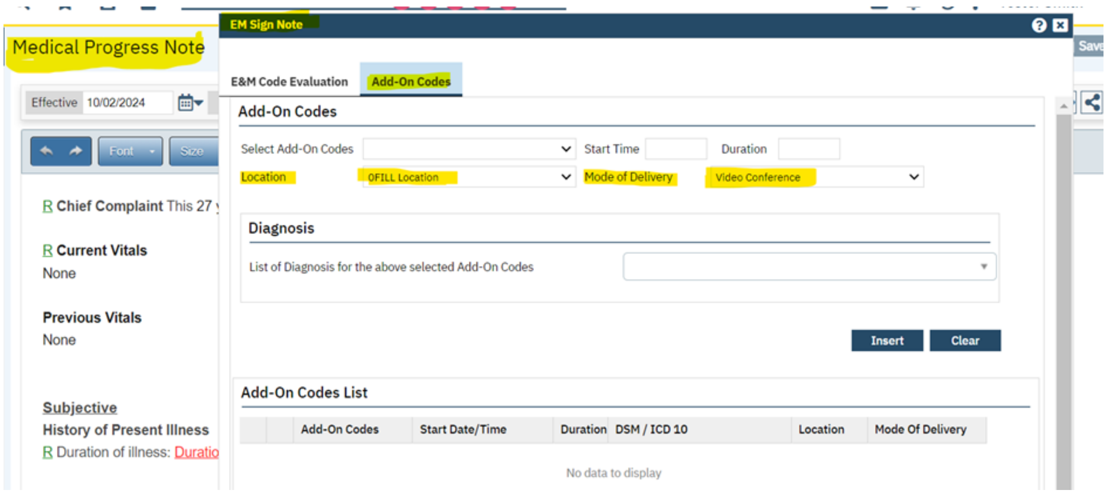
~~With this release, the below functionality has been implemented in the 'Add-On Codes' tab of 'E&M Code' pop-up in the 'Medical Progress Note'.~~

- ~~The field 'Location' dropdown in the 'Add-On Codes' tab will be initialized with the location value from the 'E&M Code Evaluation' tab.~~
- ~~The field 'Mode of Delivery' dropdown in the 'Add-On Codes' tab will be initialized with the Mode of Delivery value from the 'E&M Code Evaluation' tab.~~
- ~~The 'Location and Mode of Delivery' dropdown fields are editable and can be modified when Add-On Codes service has different Location and Mode of Delivery.~~
- ~~The 'Add-On' Code with 'Location and Mode of Delivery' values can be inserted to the 'Add-On Codes List' grid and it will be displayed in the Medical Progress note PDF document as per the existing design after sign.~~

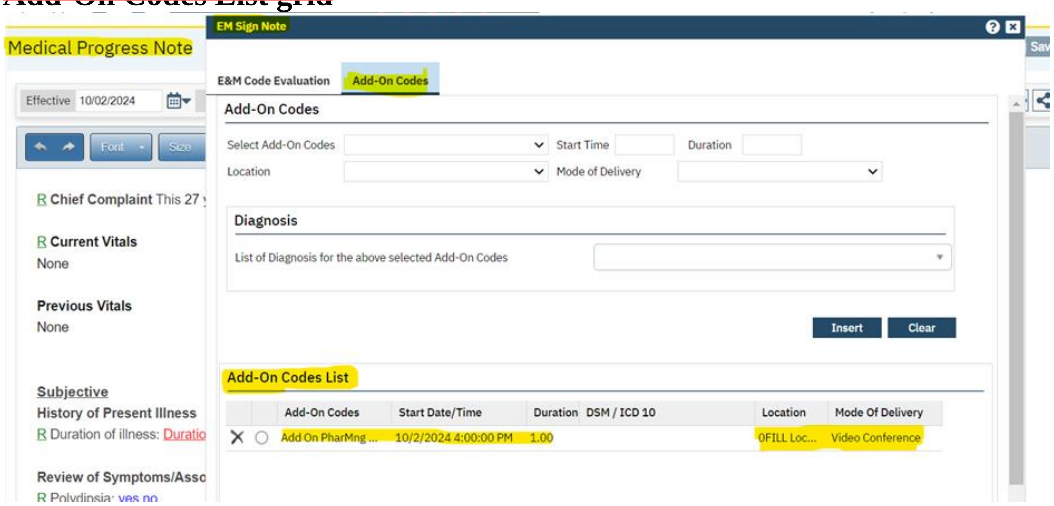
~~**'E&M Code Evaluation' tab in the E&M Code' pop-up**~~



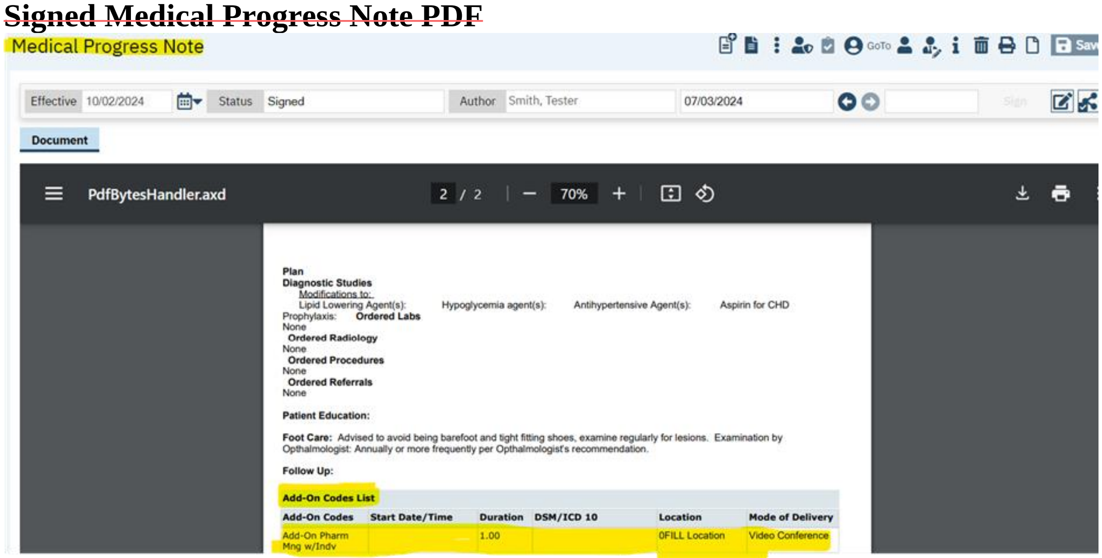
~~**'Add-On Codes' tab in the E&M Code' pop-up**~~



~~Add-On Codes List grid~~



~~Signed Medical Progress Note PDF~~



~~**Data Model Changes:** Added columns 'LocationId' and 'ModeOfDelivery' in the 'ProgressNoteAddOnCodes' table.~~

Print Check

Reference No	Task No	Description
233	EII # 128657	Performance Improvement on Claim Line Pay popup - Check Print

Author: Renuka Gunasekaran

233: EII #128657: Performance Improvement on Claim Line Pay popup - Check Print

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

Navigation Path 1: 'My Office' -- 'Claim Lines' -- select any claim type (P/I/PP/IP) -- Select Client -- Claim line Entry Screen -- Save and Close -- Select Few Claim lines from claims(My Office) -- 'Select Action' -- 'Adjudicate' -- 'Pay' -- 'Print Check'.

Functionality 'Before' and 'After' release:

Purpose: To improve the performance on Claim Line Popup CheckPoint process.

Before this release, here was the behavior. When a user clicked on 'Print check' in Pay popup for the large number of claim lines, system was taking more time to respond.

With this release, the Performance of the check print has been improved by optimizing the code for the print check process.

Procedure/Rates

Reference No	Task No	Description
234	Core Bugs # 129351	Observed slowness in the Procedure/Rates List page.

Author: SaravanaKumar Nagarajan

234: Core Bugs # 129351: Observed slowness in the Procedure/Rates List page.

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

Navigation Path: Go Search-Procedure/Rates (Administration)- Procedure/Rates list page-Click on any Procedure Hyperlink- Procedure Code Details-Click on close.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user opened the Procedure/Rates List page and navigated back and forth from the list page to the details and then back to the list page, slowness is observed in loading the screens.

With this release, the above-mentioned issue has been resolved. Now, when the user opens the Procedure/Rates List page and navigates back and forth from the list page to the details page and then back to the list page, the Procedure/Rates List page is loading fine without any slowness.

Programs

Reference No	Task No	Description
235	Core Bugs # 129462	Program Details: Rules Tab: Modify Button is Inactive.

Author: SaravanaKumar Nagarajan

235: Core Bugs # 129462: Program Details: Rules Tab: Modify Button is Inactive.

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

Navigation Path: Programs (Administration) – Enter program name – Apply Filter – Click on Program Name – Click on Rules Tab - set the End Date - click on Modify button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Rules tab of the Program Details screen, when the user selected the program and set the End Date and tried to click on Modify button, the Modify button was not active.

With this release, the above mentioned issue has been resolved. Now, when the user selects the Program in the Rules tab of the Program Details screen and sets the End Date, the Modify button is active.

Provider Client

Reference No	Task No	Description
236	EII # 128712	Implementing a Custom auto link of MCO Providers to Clients

Author: Renuka Gunasekaran

236: EII #128712: Implementing a Custom auto link of MCO Providers to Clients.

Note: This change is specific to the customer who is having the customization logic in their environment.

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

Navigation Path 1: 'Client Search' -- Create 'Potential Client' -- 'My office' -- 'Claims' -- Create any Claim type 'I'/'P'/'PI'/'PP' -- 'Claim Entry Screen' -- Enter required details by selecting Provider and Insurer -- save – insert.

Navigation Path 2: Check 'ProviderClients' table.

Functionality 'Before' and 'After' release:

Purpose: When a system receives a large volume of claims for clients in the network, that are not linked to the providers who are submitting the claims, the user would use "Approved" authorization step in Nightly job to make the link. So, it was requested to add a step in the Nightly MCO Job that will read the claim records, identify the Providers and Clients in those claim records, and create a ProviderClients for this combination, if it does not already exist.

With this release, the below mentioned changes have been done:

- The PostUpdatestoredprocedure column with 'ssp_PostUpdateClaimEntry' is updated in all claim entry screens (i,p,ip,pp) in 'Screens' table.
- A custom hook has been implemented in the new stored procedure 'ssp_PostUpdateClaimEntry' to create record in 'Providerclients' table for the clients when a claim line is created.

Note: These changes do not affect any core functionality of the system.

Psychiatric Note

Reference No	Task No	Description
237	Core Bugs # 129434	The screen shifting to a different tab than the selected tab when saving Psychiatric Note.

Author: Rakesh Naganagoda

237: Core Bugs # 129434: The screen shifting to a different tab than the selected tab when saving Psychiatric Note.

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

Navigation Path: 'Client'– 'Services/Notes' -- click on new -- 'Services/Notes' screen – Select Procedure related to 'Psychiatric Note' – Enter the data in any tab fields and click on Save button.
Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Psychiatric Note, when the user selected any tab and saved it, the screen often changed to a different tab than the selected tab.

With this release, the above-mentioned issues have been resolved. Now, the screen is not changed to another tab when the user Saves the Psychiatric Note by selecting any tab.

Reception

Reference No	Task No	Description
238	Core Bugs # 128785	Error was displaying when the user tries to open Reception / Front Desk (My Office).
239	Core Bugs # 129098	Reception: Error message was logged in the errorlog table.
240	Core Bugs # 128800	Reception Screen: The Flags are duplicating When Hitting Apply Filter.
241	Core Bugs # 129177	Location name glitch in Front Desk/Reception.
242	Core Bugs # 129385	Unable to print daily schedule with selected clinician from 'Reception/Front Desk'.
243	EII # 127202	Changes in the Reception Screen for MAT Medication Scheduled dispenses
244	EII # 126872	Changes in the Reception screen to set as 'Show' and Signed services back to 'Cancel' or 'No Show'.

Author: Niroop Hassan

238: Core Bugs # 128785: Error was displaying when the user tries to open Reception / Front Desk (My Office).

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

Navigation Path: Go Search - Reception / Front Desk (My Office).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to open Reception / Front Desk (My Office), the below error message was displayed:

Error: 8152*****String or binary data would be truncated*****ssp_PMReception*****1687*****16*****30

With this release, the above mentioned issue has been resolved. Now, when the user tries to open Reception / Front Desk (My Office) the error is not displaying and Reception/ Front Desk is displaying.

Author: Aishwarya Bommaklar

239: Core Bugs # 129098: Reception: Error message was logged in the errorlog table.

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

Navigation Path: My Office– Reception - Change the Service Status of any one of the Service – Click on Apply Filter.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user changed the Service Status from Reception screen, the below error message was logged in ErrorLog table.

Error Message: "Cannot read properties of undefined (reading 'toLowerCase')"

With this release, the above mentioned issue has been resolved. Now, the error message is not logged in the Errorlog table when the user changes the service status from the Reception screen.

Author: Niroop Hassan

240: Core Bugs # 128800: Reception Screen: The Flags are duplicating When Hitting Apply Filter.

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

Navigation Path: Go search-Reception/Front Desk -Click on Apply filter .

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Reception screen, when the user clicked on the Apply Filter button, the flags were duplicated.

With this release, the above-mentioned issue is resolved. Now, the flags are not duplicated in the Reception screen when a user clicks on the Apply filter.

Author: Niroop Hassan

241: Core Bugs # 129177: Reception: Location name exists with single quote.

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

Prerequisite: Location name exists with single quote.

Navigation Path: Go Search - Reception /Front Desk (My Office).

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. If the Location Name (E.g. Loaction'1) had single quote, the location name displayed with invalid character (E.g. Location'\1) in the Location column of Front Desk/ Reception screen.

With this release, the above-mentioned issue has been resolved. Now, in the Location column of Front Desk/ Reception screen, the location name is displaying correctly.

Author: Niroop Hassan

242: Core Bugs # 129385: Unable to print daily schedule with selected clinician from 'Reception/Front Desk'.

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

Prerequisite: The Configuration Key 'DisplayStaffAsTypeableSearchTextBox' value is set to 'Yes'.

Navigation Path: 'My Office' – 'Reception/Front Desk' - 'Reception/Front Desk' list page – Select the required clinician from the 'All Clinicians' search box and click on 'Apply Filter' button -- Click on 'Print Daily Schedule' icon.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. In the 'Reception/Front Desk' list page, when the user tried to print the 'Daily Schedule' report for selected clinician, it was displaying all reports.

With this release, the above-mentioned issue has been resolved. Now, the 'Daily Schedule' report displays only selected clinician reports.

Author: Niroop Hassan

243: EII #127202: Changes in the Reception Screen for MAT Medication Scheduled dispenses

Release Type: Change | **Priority:** Urgent
Prerequisite: The client has a 'MAT Medication' scheduled or dispensed.

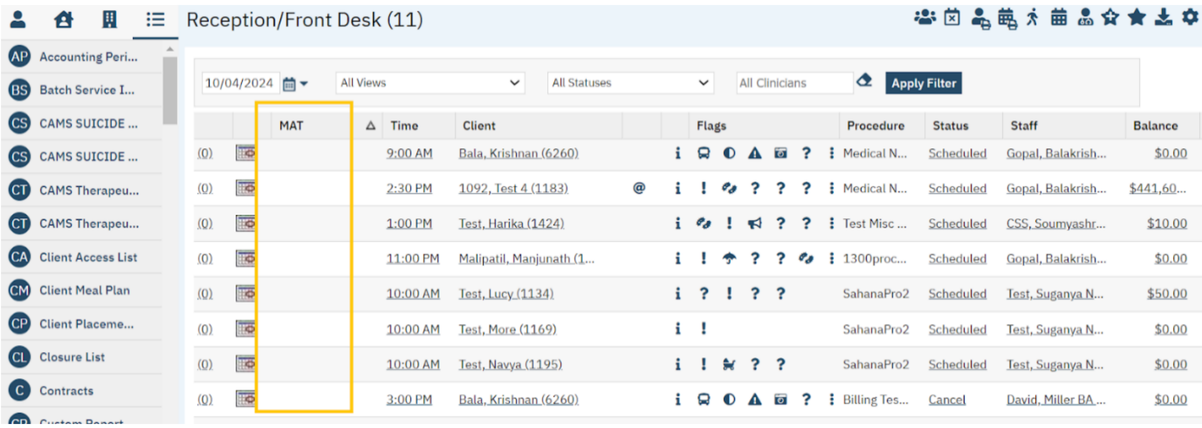
Navigation Path: 'My Office' – 'Reception/Front Desk' – 'Reception/Front Desk' list page.

Functionality 'Before' and 'After' Release:

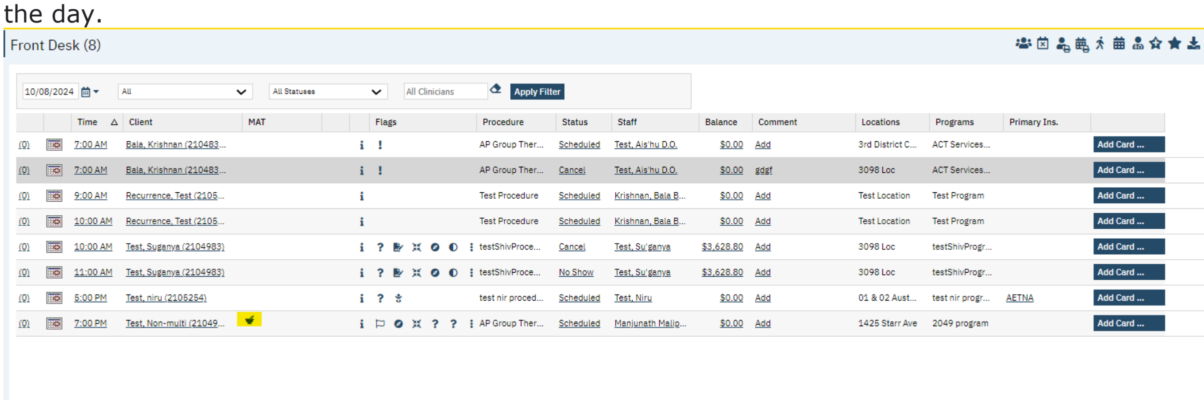
Purpose: The Scheduled dispenses are visible on the MAT Management screen, but front desk staff who are also checking in non-MAT appointments would need to switch back and forth. To avoid this, scheduled dispenses information is provided in Reception/Front Desk screen.

With this Release, the following implementation has been done:

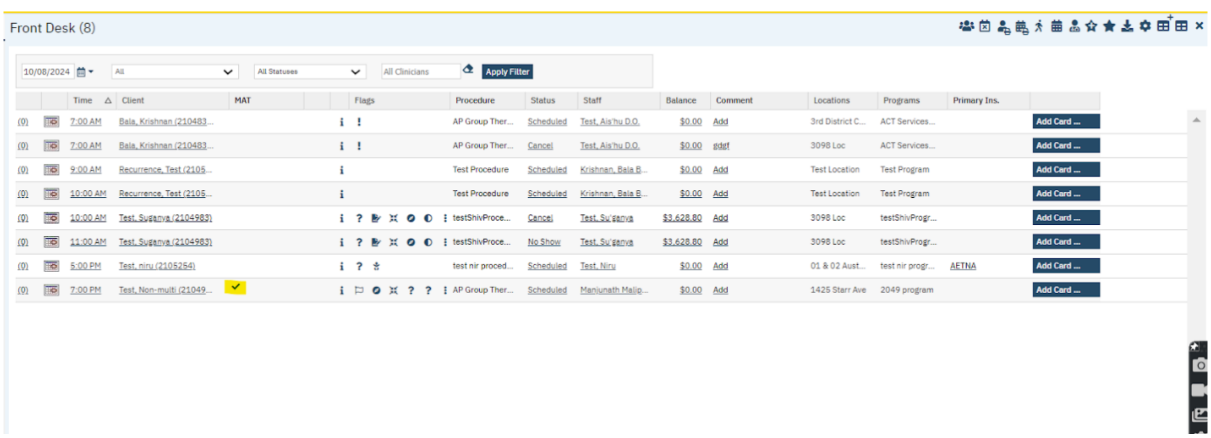
1. The 'MAT' column is added to the grid section of the 'Reception/Front Desk' list page.



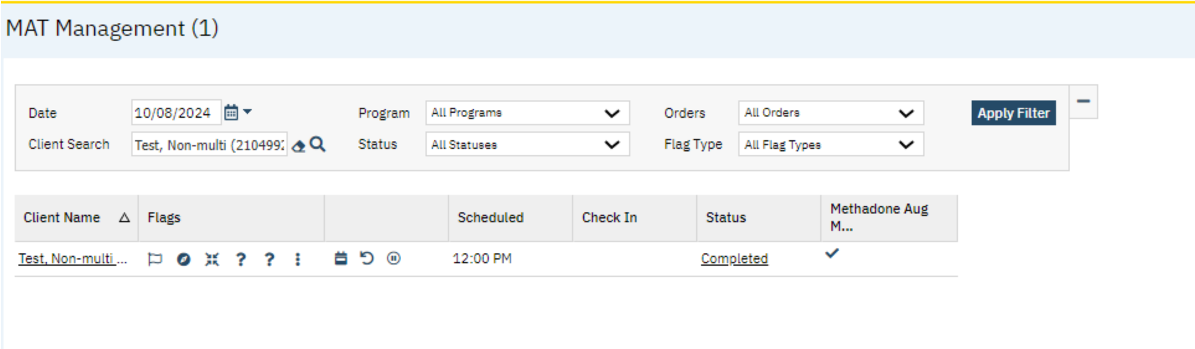
2. The 'Cup'  icon will be displayed if the client has MAT medication that needs to be dispensed for the day.



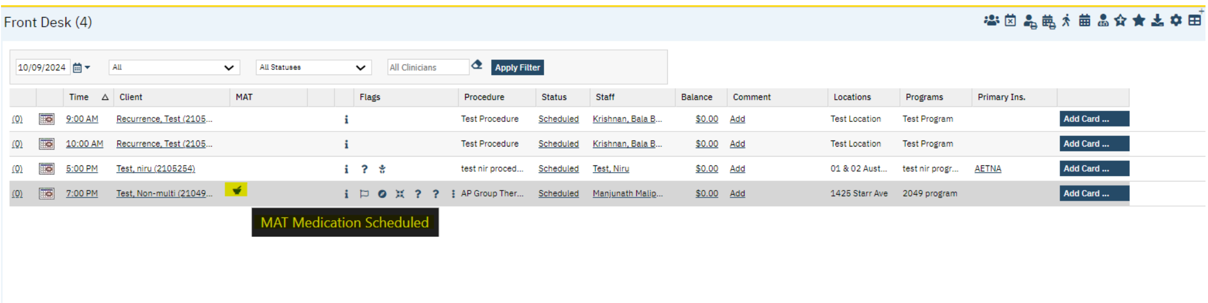
3. The 'Tick'  icon will be displayed if the client has MAT medication that has already been dispensed for the day.



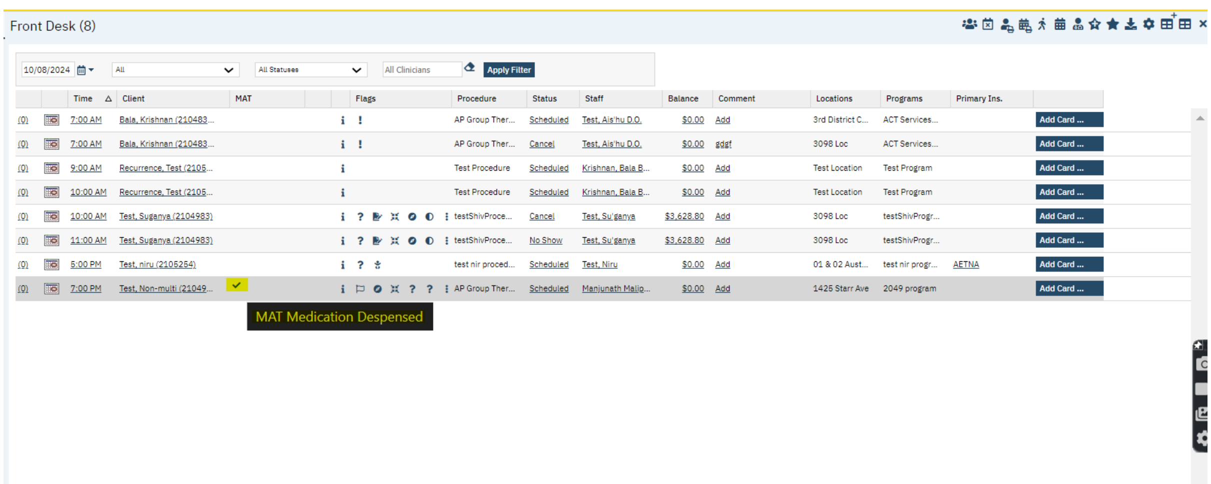
4. Clicking on the 'Cup/Tick' icon, will navigate the user to the 'MAT Management list page' . **Refer to the below screenshot**.



5. Hovering the mouse over the 'Cup' icon will show the message 'MAT Dispense Scheduled'.



6. Hovering the mouse over the 'Tick' icon will show the message 'MAT Medication Dispensed'.



Author: Niroop Hassan

244: EII # 126872 : Changes in the Reception screen to set as 'Show' and Signed services back to 'Cancel' or 'No Show'.

Release Type: Change **|** **Priority:** Urgent
Prerequisite: Signed Service is there for a client.

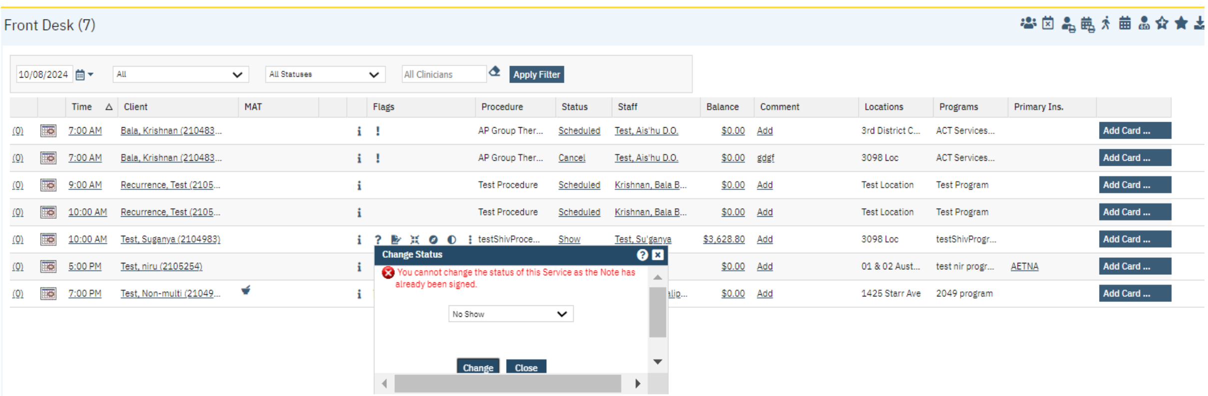
Navigation Path: 'My Office' – 'Reception' – 'Reception' list page – Click on the 'Status' hyperlink of the signed service – 'Change Status' popup – Select 'Cancel/No Show' and click on the 'Change' button.

Functionality 'Before' and 'After' Release:

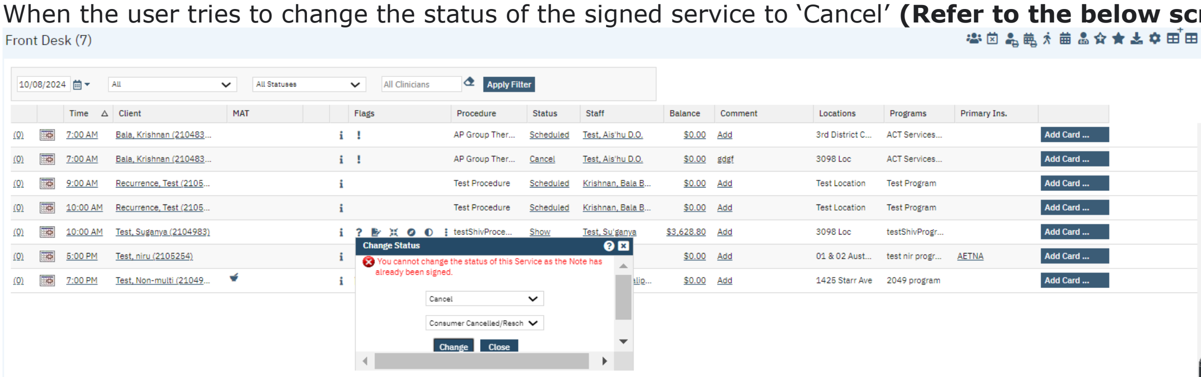
Purpose: To maintain the integrity of the already signed Note in the 'Reception' screen, when Staffs alter the status of any Service to 'Cancel' or 'No Show' in a scenario.

With this Release, when the user tries to change the status of the signed service to 'No Show/Cancel' , the below validation message is displayed in the 'Change Status' popup.

Validation message: 'You cannot change the status of this Service as the Note has already been signed'.



When the user tries to change the status of the signed service to 'Cancel' **(Refer to the below screenshot).**



Note:

1. Whenever the System Configuration Key 'DisableNoShowNotes' = N, then the system is allowing the status change to 'No show' as the note will be retained in this scenario.
2. Whenever the 'Configuration Key' 'DisableCancelNotes' = N, then the system is allowing the status change to 'Cancel' as the note will be retained in this scenario.

Risk Assessment

Reference No	Task No	Description
245	Core Bugs # 129183	The selected values are not added in the 'Risk factor look up' and 'Protective factor lookup' popup & not displayed in the 'Risk Assessment' PDF.

Author: Rakesh Gangadhar

245: Core Bugs # 129183 : The selected values are not added in the 'Risk factor look up' and 'Protective factor lookup' popup.

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

Navigation Path: 'Client' search -- – 'Documents' – 'Risk Assessment' screen – 'Risk Assessment' tab – 'Protective Factors' section/ Other Risk Factors section – Click on 'Protective Factor Lookup' button/ 'Risk Factor Lookup' button –'Protective Factor Lookup' popup/ 'Risk Factor Lookup' popup appears.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Risk Assessment' screen, when the values in the 'Risk Factor Lookup' and 'Protective Factor Lookup' popups were selected and the user had clicked on 'Ok', the values were not added and not displayed in the 'Risk Assessment' PDF.

With this release, the above-mentioned issue is resolved. Now, the selected values in the 'Risk Factor Lookup' and 'Protective Factor Lookup' popups are added when clicking on 'Ok' button under the 'Risk Assessment' screen and also displayed in the 'Risk Assessment' PDF.

RWQM

Reference No	Task No	Description
246	EII # 125088	Added additional filters and columns to the 'RWQM Work Queue' list page and also re- arranged the columns.

Author: Namratha Nagaraj

246: EII # 125088: Added additional filters and columns to the 'RWQM Work Queue' list page and also re- arranged the columns.

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

Navigation Path: 'My Office' – 'RWQM Work Queue' -- 'RWQM Work Queue' list page.

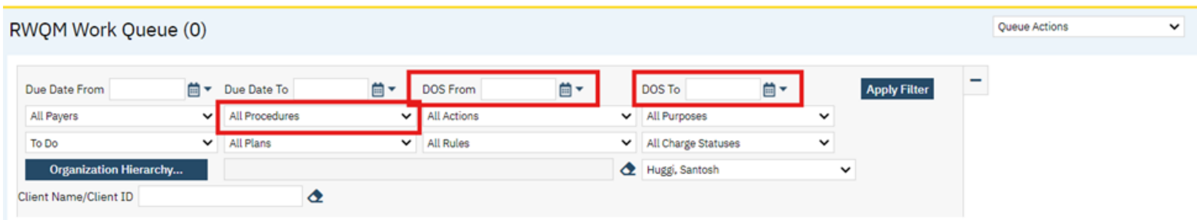
Purpose: To make the 'RWQM Work Queue' list page more efficient and user-friendly.

Functionality Before and After release:

With this release, the following fields have been implemented in the Filter section of the 'RWQM Work Queue' list page and rearranged the list page filter parameters and list page columns.

- DOS From
- DOS To
- Procedure

Filter Section:



- **DOS From:** This field is a Date control field. When filtered by these dates, Displays the records list with a DOS lying in this date range.

- **DOS To:** This field is a Date control field. When filtered by these dates, Displays the records list with a DOS lying in this date range.
- **Procedure:** This is a dropdown field, and it has a responsive option 'All active Procedure Codes'. When filtered by a Procedure, displays records list that map to the selected Procedure.

The 'RWQM Work Queue' list page filter parameters are rearranged in the following order: Due Date From

2. Due Date To
3. DOS From
4. DOS To
5. All Payers
6. All Procedures
7. All Actions
8. All Purposes
9. To Do/Complete
10. All Plans
11. All Rules
12. All Charge Statuses
13. Organization Hierarchy…
14. All My Staff
15. Client Name/Client ID

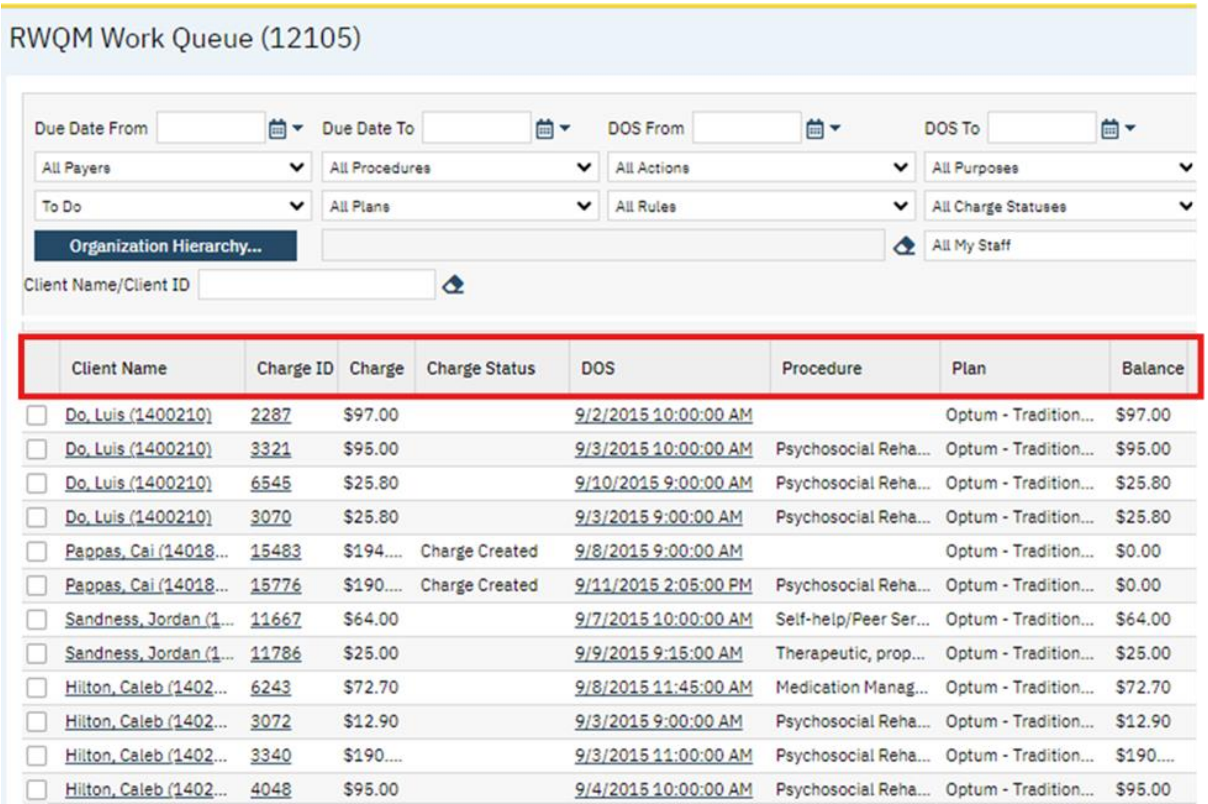
Grid Section:

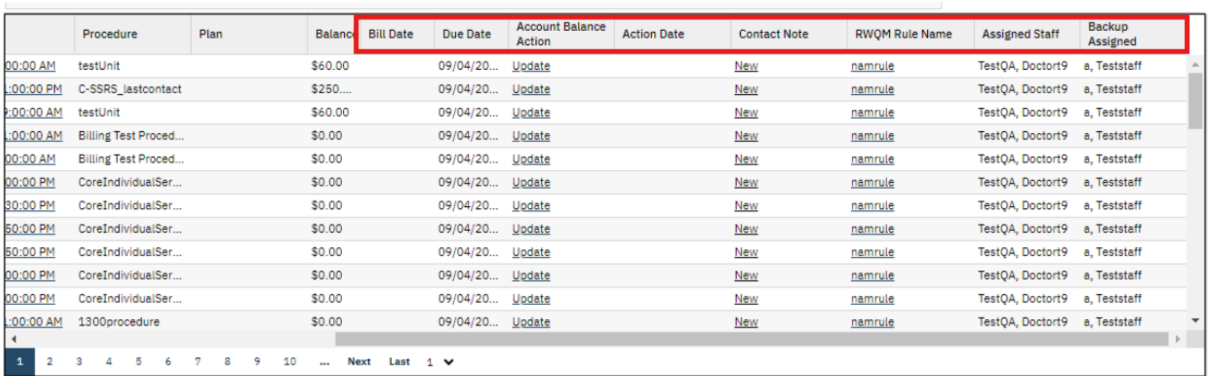
Procedure: This will display the Procedure Code mapped to the Service.

The 'RWQM Work Queue' list page columns are rearranged in the following order

1. Client Name
2. Charge ID
3. Charge
4. Charge Status
5. DOS

6. Procedure
7. Plan
8. Balance
9. Bill Date
10. Due Date
11. Account Balance Action
12. Action Date
13. Contact Note
14. RWQM Rule Name
15. Assigned Staff
16. Backup Assigned





Rx Application

Reference No	Task No	Description
247	Core Bugs # 128169	Pharmacy Preview Page not showing the days correctly.
248	Core Bugs # 128736	The user received critical alerts because the medication is not saved due to network latency or a sluggish internet connection.
249	Core Bugs # 128886	Medication Titration Incorrectly Showing for multiple instructions
250	Core Bugs # 128920	Queued Orders: Loss of Data when Multiple Users concurrently queued prescriptions.
251	Core Bugs # 128940	Incorrect NDC code is sent to the Surescripts when the user changes the strength of the medications while approving the Refills and prescribes them electronically.
252	Core Bugs # 128946	Rx Logging out when re-ordering medication by the Non prescriber
253	EII # 127071	To remove requirement for height and weight for Rx < 18
254	EII #127276	Rx: Save/Default ALL data in Templates, Retain ALL data in Refill/Modify Action from Original Order, and Label Change
255	Core Bugs # 129280	Modify the Route Description Details
256	EII # 128651	Mapping few more Layman's terminologies to the medication routes.
257	EII # 128284	The "Sure Scripts Medication History" does not reload if the history is available.
258	Core Bugs # 129317	Send Script Requiring Script Clarification Due to mg/ml Confusion
259	Core Bugs # 128941	Getting an error Message when generating a PMP report.

Author: Rajgopal Yajurvedi

247: Core Bugs # 128169: Pharmacy Preview Page not showing the days correctly.

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

Navigation Path: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Select the Drug with starting three letters – In two steps fill all required fields with 30 days each –– click on 'Insert' button – Select the Pharmacy with EPCS – click on 'Prescribe' button– Click 'Pharmacy Preview' button – Preview Medication Script – Medication Prescribed Section – Days Supply.

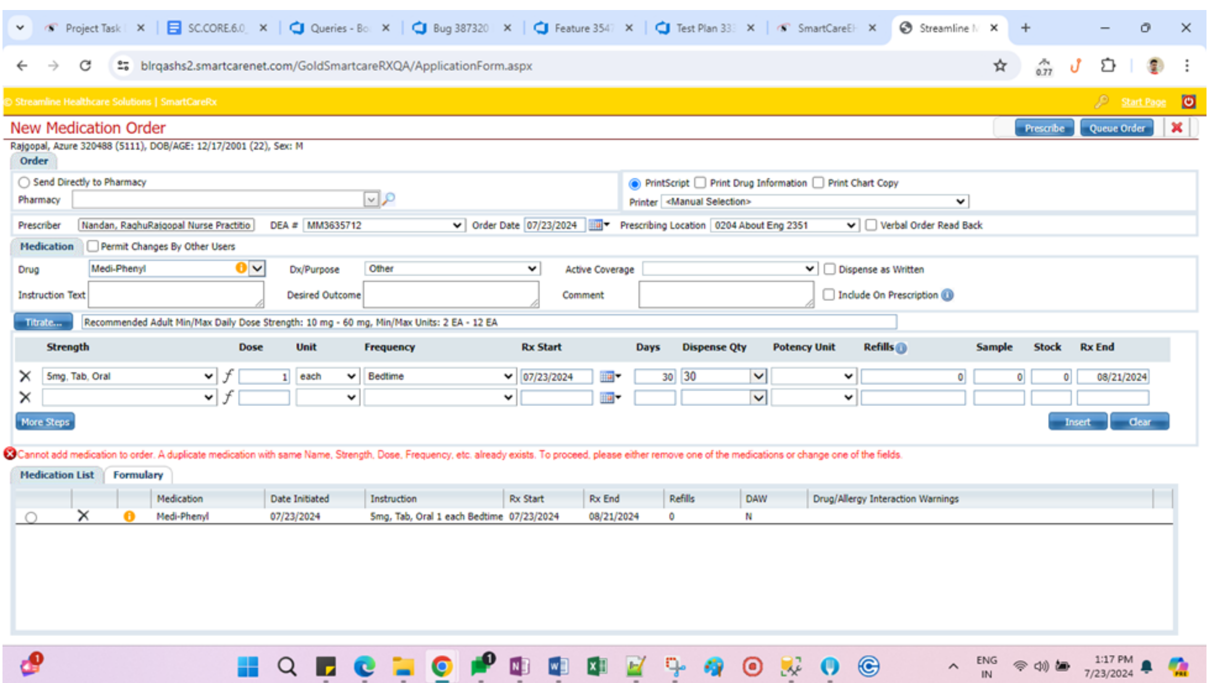
Functionality 'Before' and 'After' release:

Before this release, here was behaviour. The prescriber had selected EPCS pharmacy and added the prescription in two steps with a 30-day period. And the prescriber selected the Prescribe button and navigated to the Prescribe Page and clicked the Pharmacy Preview button, then the days were shown as 59 instead of 60 in the Pharmacy Preview Script.

With this release, the above mentioned issue has been resolved. Now, when the user adds the medication with Same Days in multiple steps, then checks in Pharmacy Preview Script, then days are calculated correctly and displayed. And also the validation message is added for the below scenarios and medication is not allowed to insert:

- When prescriber adds the same instruction for the same Medication in the same Order.
- When prescriber add the same instruction for the same medication in the different order.
- When user add the same instruction with same refills for the same medication different order.

Validation Message: 'Cannot add medication to order. A duplicate medication with same Name, Strength, Dose, Frequency, etc. already exists. To proceed, please either remove one of the medications or change one of the fields.'



Author: Manjunath Malipatil

248: Core Bugs # 128736: The user received critical alerts because the medication is not saved due to network latency or a sluggish internet connection.

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

Functionality 'Before' and 'After' release:

Navigation Path 1: Login to 'Rx Application' – 'Start Page' – 'Patient Search' – 'Patient Summary' screen – Click on the 'Add Medication' button – select a Medication – Enter all the Details – Insert the 'Medications' – Select the inserted medication add more steps and modify it – click on 'Save' button.

Navigation Path 2: Login to 'Rx Application'– 'Start Page' – 'Patient Search' – 'Patient Summary' screen – select the 'Non-Order Medication' -- 'Update Medication (Non-Ordered Locally)' screen –Select the medication add more steps and modify it – click on 'Save' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user faced a slow internet connection and added medication in the 'Add Medication' screen and then made modifications, the 'Medication' was not saved, and the user encountered critical alerts.

With this release, the above-mentioned issue has been resolved. Now, medications are saved correctly when medications are added to the 'Add Medication' screen, without triggering any critical alerts.

Author: Rajgopal Yajurvedi

249: Core Bugs # 128886: Medication Titration Incorrectly Showing for multiple instructions.

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

Prerequisite: Medications with Titration needs to be Queued Ordered via below **path:**

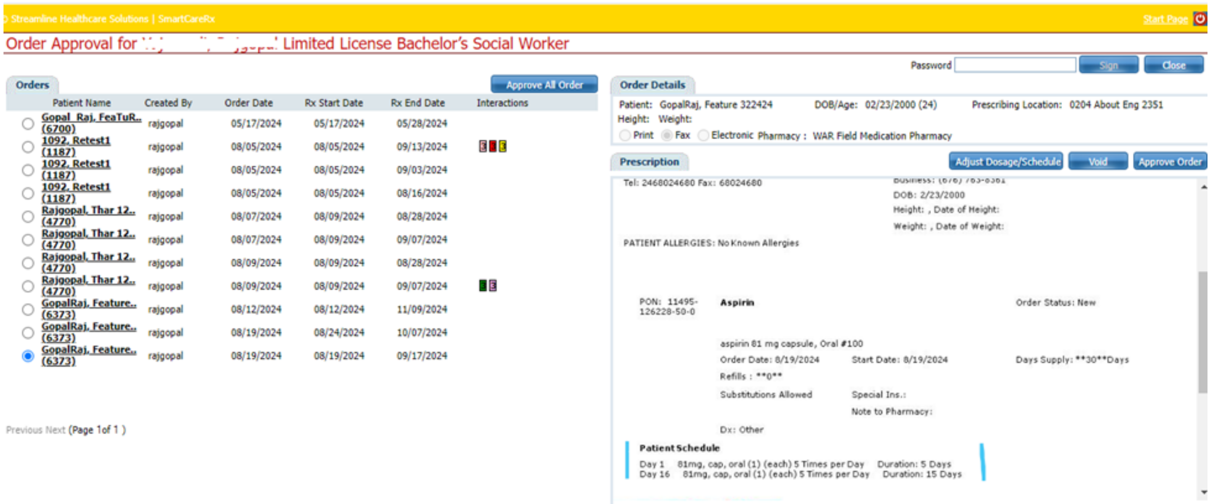
Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Select the Drug with starting three letters –Click On Titration button – Titration Popup – Add the different instructions in alternative steps – Click 'Save&Close' button – click on 'Queued Order ' button - 'Patient Summary' page.

Navigation Path: Login to SmartCare Application - 'My Office'– 'Medication Management' link – Rx Application – Start Page – Click 'Queued Order' – Order Section – Select Medication radio button – Prescription section.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Rx application, when the prescriber queued the titration medication and navigated to the Order Approval page, the Patient Schedule was not displayed in the Prescription section.

With this release, the mentioned issue has been fixed. Now, when the prescriber queues the titration medication and navigates to the Order Approval page, the Patient Schedule will be displayed in the Prescription section.



Author: Manjunath Malipatil

250: Core Bugs # 128920: Queued Orders: Loss of Data when Multiple Users concurrently queued prescriptions.

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

User 1

Navigation Path 1: Login to Rx Application – Start Page – Patient Search – Patient Summary screen – Click on New Order Button – select a medication – enter all the details – insert the medications – Click on Queued order Button.

User 2

Navigation Path 2 : Login to Rx Application– Start Page – Patient Search – Patient Summary screen – Click on New Order Button – select a medication – enter all the details – insert the medications – Click on Queued order Button.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the multiple users were simultaneously working on creating queued orders, there was a data loss. (For instance, if the first user (User 1) clicked on the "Queued Order" button and the second user (User 2) clicked on it a moment later, only the first user's queued order was saved. The second user's queued order was not saved.)

With this release, the above-mentioned issue has been resolved. Now, the data loss does not occur when multiple users are creating a Queued order simultaneously.
Additionally, when the Queued order button is pressed, the button will be disabled so that multiple clicks are avoided.

Author: Manjunath Malipatil

251: Core Bugs # 128940: Incorrect NDC code is sent to the Surescripts when the user changes the strength of the medications while approving the Refills and prescribes them electronically.

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

Navigation Path: Login to Rx Application -- Start Page -- Refill Requests Tab -- click on Approve with changes button -- select a medication -- Click on strength Drop down and select the different strength -- click on modify button -- Click on Prescribe button in Prescribe Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user changed the strength of the medications while approving the Refills and prescribing them electronically, the Refill requested NDC code was sent to Surescripts instead of approved medication's NDC code.

With this release, the above-mentioned issue has been resolved. Now, when the user approves the Refills by changing the medication strength and prescribes electronically, the correct NDC code is sent to the Surescripts, which is matched to the Approved refill medication.

Author: Rajgopal Yajurvedi

252: Core Bugs # 128946: Rx Logging out when re-ordering medication by the Non prescriber

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

Prerequisite:

- Original prescriber is inactive on selected medication and the current login staff is non-prescriber.

- Medications needs to be prescribed via below **path**:

Login to SmartCare Application - 'Client' – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Select the Drug with starting three letters – Fill all required fields – click on 'Insert' button – click on 'Prescribe' button - Prescribe Page – Click 'Prescribe' button – 'Patient Summary' page.

Navigation Path: Login in Rx (as a Non Prescriber Staff) - Go to Patient Summary Screen -select medication - Click Re-order button – Re-Order Medication Order page – Select the medication from Medication List.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the non-prescriber staff selected the radio button for Medication in Medication List section, on the Re-Order Medication Order Page of the Rx application, the non-prescriber was logged out of the application.

With this Release, the above mentioned issue has been resolved. Now, for the non-prescriber staff, on selecting the radio button for Medication in Medication List section, then the non-prescriber staff will not be logged out of the application.

Author: Manjunath Malipatil

253: EII # 127071: To remove requirement for height and weight for Rx < 18

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

Prerequisite:

1. The Height and weight is added to the client who is less than 18 years from below **path**:

Login to SmartCare Application -- Select a client who is less than 18-year-old -- Flow Sheet (Client) -- Click on New Button -- New Entry Flow Sheet screen – Enter the height and weight – Enter the required fields -- Click on save button.

2. The value of the System configuration key 'ShowMsgWhenHeightWeightIsMissingInRx' is set to 'Yes'.

3. This Configuration Key will influence the following screen: SmartCareRx

Navigation Path 1: Login to Rx Application – In start page click on Patient Search – Select a patient who is less than 18-year-old and does not have height and weight – In Patient Summary screen Click on New Order button – In New Medication order screen select a medication—enter all the required fields and insert the medication – Click on Prescribe button—Confirmation pop up – enter all the required fields – Click on Ok to Prescribe Button – prescribe screen click on Prescribe button.

Navigation Path 2: Login to Rx Application – In start page click on Patient Search – Select a patient who is less than 18-year-old and does not have height and weight – In Patient Summary screen, Click on New Order button – In New Medication order screen select a medication—enter all the required fields and insert the medication – Click on Queue Order button -- Confirmation pop up – enter all the required fields – Click on Ok to Queue Order Button.

Navigation Path 3: Login to Rx Application – In start page click on Patient Search – Select a patient who is less than 18-year-old and does not have height and weight – In Patient Summary screen select a medication and click on Re order Button –In Re-Order Medication Order screen -- Click on Prescribe button—Confirmation pop up – enter all the required fields – Click on Ok to Prescribe Button – prescribe screen click on Prescribe button.

Navigation Path 4: Login to Rx Application – In start page click on Patient Search – Select a patient who is less than 18-year-old and does not have height and weight – In Patient Summary screen select a non-controlled medication and click on Change order Button – In Change Medication Order screen -select a medication and make necessary changes and click on Modify button - Click on Prescribe button—Confirmation pop up – enter all the required fields – Click on Ok to Prescribe Button – prescribe screen click on Prescribe button.

Navigation Path 5: Login to Rx Application – In start page click on Patient Search – Select a patient who is less than 18-year-old and does not have height and weight – In Patient Summary screen select a SmartCare order and click on Complete order Button –In Complete Medication Order screen -- Click on Prescribe button—Confirmation pop up – enter all the required fields – Click on Ok to Prescribe Button – prescribe screen click on Prescribe button.

Navigation Path 6: Login to Rx Application – In Start page click on Queued Order button – In order Approval Screen select a medication – Click on Adjust Dosage/Schedule button –select a medication and make the adjustments to the medication - click on modify button – Click on Save Adjustment Button -- Confirmation pop up – enter all the required fields –– Click on Ok to Adjustment Button – In Prescribe screen click on Update Order button.

Functionality 'Before' and 'After' release:

Purpose: The user can't always get the patient's height and weight during a telehealth appointment since the patient or parent doesn't know or doesn't want to give it to them. The current validation is a hard stop in these situations; thus, the prescriber is unable to prescribe.

Before this release, here was the behaviour. A validation message was triggered in the RX Application when the user tries to prescribe the medication to a client who is less than 18 years old and does not have height and weight added.

With this release, a new System configuration key 'ShowMsgWhenHeightWeightIsMissingInRx' is introduced.

System Configuration Key Details:
System Config Key: ShowMsgWhenHeightWeightIsMissingInRx
Read Key as: Show Msg When Height Weight Is Missing In Rx.
Allowed Values: Yes, No
Default Value: No

Description: This new feature is being added to the core product by introducing a system configuration key. The value of this key will determine the default value of the"ShowMsgWhenHeightWeightIsMissingInRx" functionality. This validation includes a Confirmation Message popup with soft stop functionality.

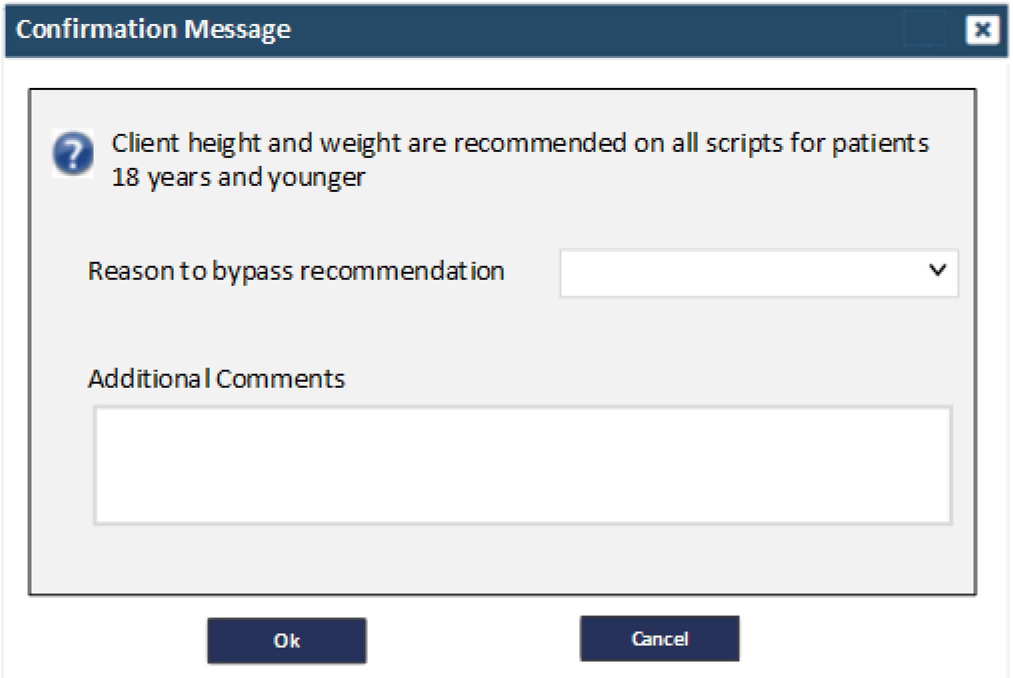
Note from NCPDP - Script Implementation Recommendations Document - Dated March 2020: Currently, SCRIPT version 10.6 does not require that patient height and/or weight be sent, the transmission of this additional patient information is supported in the Observation Segment. This information is especially important for infused, injected, oncology, and paediatric medications.

If the Key-value is set to "Yes", then throw Confirmation Message popup when user clicks on Prescribe and:

1. Client is 18 years or younger, and

2. Client has no Height and/or Weight Flow Sheet entry, or

3. Client's most recent Height and/or Weight Flow Sheet entry is 6 months ago or more.



This popup includes soft stop functionality for prescribing medication in RX, until:

1. User selects one of the global code options and clicks Ok, or

2. User enters the Client's Height and Weight on Flow Sheet, or

3. Client turns 19 years old.

If the Key-value is set to "No", then the SmartCare doesn't throw Confirmation Message popup at all. This will be the default value of the key.

Note:

1. Regardless of this configuration key, the system doesn't throw Validation on a verbal order. (orders that have already been sent to Pharmacy)

2. 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 is "No".

The reason to bypass recommendation: Drop down with has following response options for selection.

- Patient refused

- Unable to obtain due to patient condition

- Unable to obtain due to clinical setting (e.g. telehealth etc.)

- Specific medication or dose is not impacted by height/weight

- Other

These are global sub codes under the global code 'RxHeightWeightValidation' which comes under the global code category 'RxValidationOverride'.

Ok to Prescribe: Button: It will be disabled by default and will be enabled only when the user selects any response option for reason to bypass recommendation.

- If user selects Other as a response option, the user needs to enter the Additional comments, then only Okay to Prescribe Button will be enabled.

Note: Additional Comments is a text field with Maximum 250 characters.

Once user enters all the required details, the user will be allowed to bypass the height and weight Validation and will be able to prescribe the Medication.

Data Model Changes:

- New table ClientMedicationOrders added.

- New table ClientMedicationOrderValidationOverrides added.

- New column "ClientMedicationOrderId" added in ClientMedicationScriptDrugs Table with foreign key reference ClientMedicationOrders.ClientMedicationOrderid.

Author: Rajgopal Yajurvedi

254: EII # 127276: Rx: Save/Default ALL data in Templates, Retain ALL data in Refill/Modify Action from Original Order, and Label Change

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

Navigation Path 1: 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 – Select Save as Templated / Override Template – click on 'Insert' button – Select the Pharmacy – click on 'Prescribe' button– 'Prescribe' button – 'Patient Summary' page

Navigation Path 2: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Select the above prescribed medication – Re Order button – Re-Order Medication Order Page – Verify above selected Pharmacy is selected – click on 'Prescribe' button– 'Prescribe' button – 'Patient Summary' page

Navigation Path 3: Login to SmartCare Application - 'Client'– 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – Select the above prescribed medication – Change Order button – Change Order Medication Order Page – Verify above selected Pharmacy is selected – click on 'Prescribe' button– 'Prescribe' button – 'Patient Summary' page

Functionality 'Before' and 'After' release:

Purpose: The users were struggling with using Rx for their overall needs due to lack of flexibility with Rx Templates. At this time users had to create their own templates for each medication.

- User has requested to be able to change the template values, if desired, before finalizing the script.

- User has requested to have all fields be available to default in the template, i.e. include Comment fields, include on prescription etc. since right now the templates are limited to specific fields and they want all visible fields to allow for default since there are times when the template will be for specific use cases and will need these extra fields to be populated.

- Users also need a way to create order sets within Rx as there are times where they do prescribe the same types of medications together and do not want to have to search for each one individual

Before this release, here was the behaviour.

1. In the New Medication Order Page, when a user search & select the medication, and select 'Save as Template / Override Templated' radio button, then below fields were getting saved with 'Save as Template / Override Templated' functionality. So when a user searches the same medication, then these below fields were auto filled with 'Save as Template / Override Templated functionality'.

- Strength
- Quantity
- Unit
- Schedule
- Days
- Refills
- DispenseQuantity
- DispenseQuantityText
- Comment
- IncludeOnPrescription
- SpecialInstructions

2. In the New Medication Order page, when the user selects the Pharmacy in Pharmacy dropdown and prescribes the medication. Next if user select the medication and goes for Re-Order or Change Order, then Preferred Pharmacy was displayed, instead previously above selected Pharmacy

3. In the New Medication Order page, Label Direction was present for patient's instructions.

With this release. the functionalities are modified as below.

1. In the New Medication Order Page, when a user search & select the medication, and select 'Save as Template / Override Templated' radio button, then along with above fields, the below fields also will be saved with 'Save as Template / Override Templated' functionality.

So, if user searches the same medication, then along with above fields, the below fields will be auto filled with 'Save as Template / Override Templated' functionality

-Dx/Purpose

-Dispense as Written

-Desired Outcome

-Note to Pharmacy

-Include On Prescription

-Dose

-Frequency (Previously called 'Directions')

-Potency Unit

-Additional Orders

-Sample

-Stock

2. Here in Pharmacy selection,

- In the New Medication Order page, when the user selects the Pharmacy in Pharmacy dropdown and prescribes the medication. Next if user select the medication and goes for Re-Order or Change Order, then above selected Pharmacy will be auto selected.

- And if multiple medication are prescribed to one pharmacy and if user select the that multiple medication and goes for Re-Order or Change Order, then above selected Pharmacy will be auto selected.

- And if multiple medication are prescribed to multiple pharmacies and if user select the that multiple medication and goes for Re-Order or Change Order, then preferred Pharmacy will be auto selected or if preferred pharmacy is not selected for the patient, then pharmacy dropdown will be empty.

3. In the Rx Application, Direction label is changed to Frequency label for patient's medication instructions.

Data Model Changes: In Table Drugordertemplates added new columns Purpose,DesiredOutcome,PotencyUnit,Stock,Sample,DispenseAsWritten

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Author: Rajgopal Yajurvedi

255: Core Bugs: 129280: Modify the Route Description Details.

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

Navigation Path: Login to SmartCare Application – Client – 'Medication Management (Rx)' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Select the Topical Drug with starting three letters(like Skin related drug) – Fill all required fields – Select the Potency Unit code – Select the EPCS Pharmacy – click on 'Insert' button – click on 'Prescribe' button - Prescribe Page – Click on Preview Pharmacy – Verify layman's term in frequency – 'Prescribe' button – Medication Script – Verify layman's term in frequency - 'Patient Summary' page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a prescriber electronically prescribed a topical medication, 'Such as the Skin or the Eye' (layman's term) was mentioned under the Frequency section of the Medication Script or Pharmacy Preview script.

With this release the above mentioned issue has been resolved. Now, when a prescriber electronically prescribes a topical medication, then 'Onto The Surface' (layman's term) is mentioned under the Frequency section of the Medication Script or Pharmacy Preview script.

Author: Rajgopal Yajurvedi

256: EII # 128651: Mapping few more Layman's terminologies to the medication routes.

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

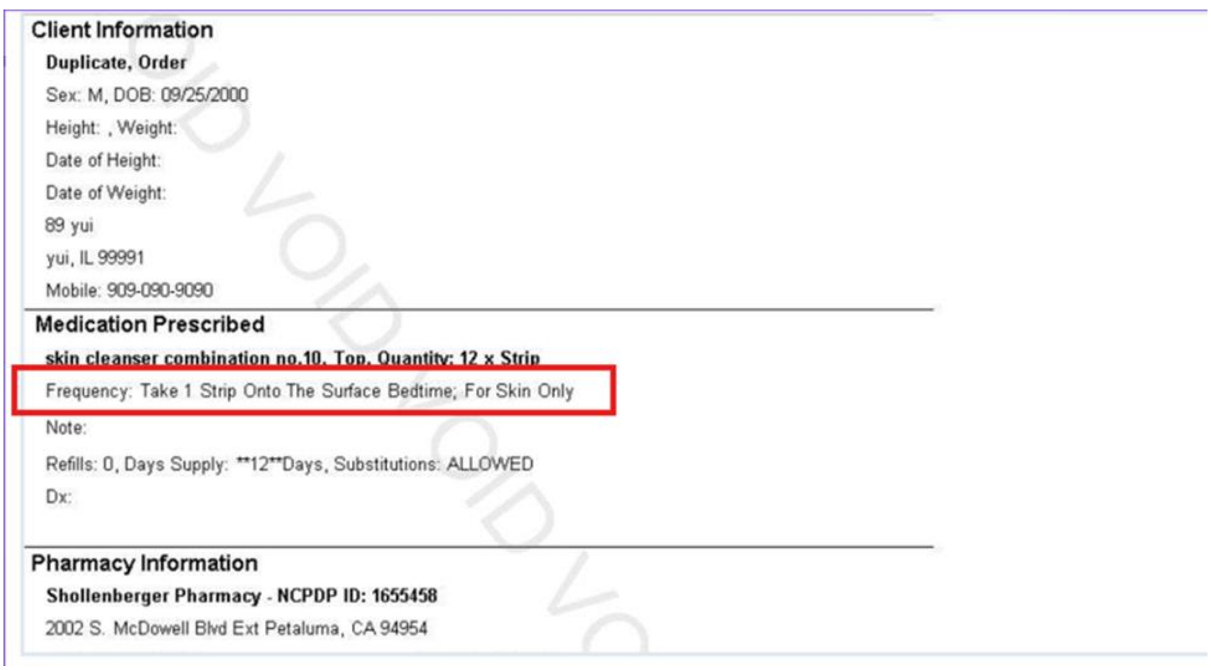
Navigation Path: Login to SmartCare Application - 'Client' – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – 'New Medication Order' Page - Select the Drug with starting three letters – Fill all required fields - Select the potency unit code - Select the EPCS Pharmacy – click on 'Insert' button – click on 'Prescribe' button – Prescribe Page – click Prescribe button – MedicationScript.

Functionality 'Before' and 'After' release:

Purpose: To add Layman's terms for medication routes and frequency information for better clarity of prescription.

With this release, some more Layman terms are added to the Medications/Routes and the frequency information. i.e the below format where pharmacists will have a better understanding of the prescription.

Example Format – Frequency: Take 1 Strip **(Potency Unit Code)** Onto The Surface **(Layman's Terms)** Bedtime; For Skin Only **(Additional Instructions)**


Client Information
Duplicate, Order
Sex: M, DOB: 09/25/2000
Height: , Weight:
Date of Height:
Date of Weight:
89 yui
yui, IL 99991
Mobile: 909-090-9090

Medication Prescribed
skin cleanser combination no.10, Top, Quantity: 12 x Strip
Frequency: Take 1 Strip Onto The Surface Bedtime; For Skin Only
Note:
Refills: 0, Days Supply: **12**Days, Substitutions: ALLOWED
Dx:

Pharmacy Information
Shollenberger Pharmacy - NCPDP ID: 1655458
2002 S. McDowell Blvd Ext Petaluma, CA 94954

Author: Rajgopal Yajurvedi

257: EII # 128284: Rx: The "Sure Scripts Medication History" does not reload if the history is available.

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

Prerequisite:

1. Service is scheduled for the client through the below **path:**

    a. Login to 'SmartCare' Application - 'Client' search – 'Service' - Click on the 'New' button - 'Service Details' page - Enter all required details - Click the 'Save' button.

2. Sign the 'Medication History Request Consent' document through the below **path:**

    a. Login to 'SmartCare' Application - 'Client' search – 'Medication History Request Consent' document - Enter all the required details - 'Sign' document.

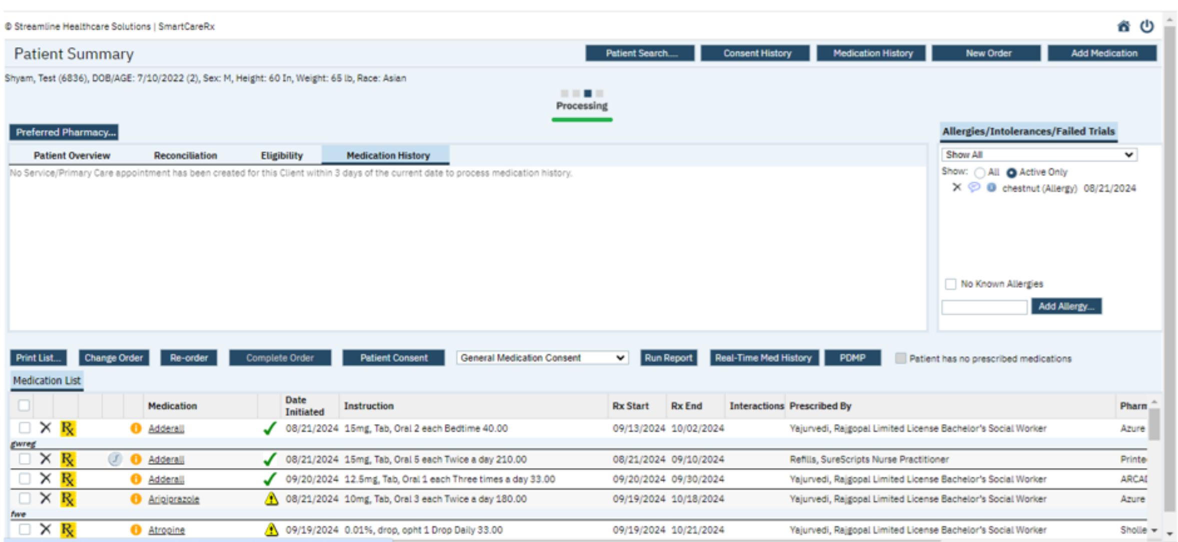
Navigation Path: Login to 'SmartCare' Application - 'Client' search – 'Medication Management (Rx)' – 'Rx' Application – 'Patient Summary' screen – 'Medication History' tab.

Functionality 'Before' and 'After' release:

Purpose: To reload the medication history data when the prescriber clicks the "medication history" tab.

Before this release, here was the behavior. In the 'Rx' Application, the "Sure Scripts Medication History" was not reloading if the history was available during the user's active session.

With this release, the above-mentioned issue has been Resolved. Now, a logic is implemented to reload the 'Medication' history data, when the prescriber clicks on the "Medication History" tab.



Author: Rajgopal Yajurvedi

258: Core Bugs # 129317: Rx Send Script Requiring Script Clarification Due to mg/ml Confusion.

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

Navigation Path: Login to SmartCare Application - 'Client' – 'Medication Management Rx' link – Rx Application – 'Patient Summary' screen – New Order button – New Medication Order Page - Select the Drug(mg/ml) with starting three letters – Fill all required fields - check potency unit code dropdown disabled - click on 'Insert' button - Click Prescribe button - Prescribe page - Patient Summary page.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. During the prescription, when the user was prescribing the mg/ml type of some medications, then medication instructions were sent to the pharmacy with incorrect data due to potency unit code.

With this release, we have fixed the above issue. Now, when the user is prescribing the mg/ml type of medications, the potency unit code dropdown will be disabled, and the Null value will be stored in the ClientMedicationinstructions table. And the medication instructions are sent to pharmacy with correct data.

Author: Manjunath Malipatil

259: Core Bugs # 128941: Getting an error Message when generating a PMP report.

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

Prerequisite: The value of the system configuration key NumberOfPDMPStateRegistrations is set to greater than 1 (i.e.., 2, 3 etc.)

Navigation path: Login to Rx Application -- Start Page -- Click on 'Patient Search' – select a patient – 'Patient Summary' Screen – Click on 'PMP' Button – 'PDMP State Selection' pop up – Select the state from state selection popup – click on Save & Close button.

Functionality 'Before' and 'After' release:

Before This release, here was the behaviour. When the system was configured with Multi-state PMP, and the user selected a state from the 'PDMP State Selection' pop-up in the 'Patient Summary' screen, the below mentioned red error message is displayed. PMP Report is not generated.

Error message: An Error has occurred. Please Contact your System Administrator.

With this release, the above-mentioned issue has been resolved. Now, the PMP Report is generated when the user selects a state from the 'PDMP State Selection' pop-up on the Patient Summary screen.

Scanning

Reference No	Task No	Description
260	Core Bugs # 128540	Error during batch scan
261	Core Bugs # 128655	Uploading of selected files in the 'Batch Image Upload' popup in the 'Scanning' screen is not working.
262	Core Bugs # 128758	Scanning: Uploaded PDF files are not displayed within the frame.
263	Core Bugs # 128842	Scanning: Metadata tab for lab reviewers is not appearing for Scanned Medical Records.
264	Core Bugs # 128964	Scanning: Out of Memory Exception was thrown
265	Core Bugs # 129483	Scanning: When uploading records to client files using the Scanning feature, the Provider chosen during the upload process is not reflected on the CM Events list page.

Author: Tejaswini Srinivas

260: Core Bugs # 128540: Error during batch scan

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

Navigation Path: My office -- Scanning -- Click on Batch scan.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The user was unable to load the bulk-scanned documents due to an exception during the batch scan.

With this release, the above-mentioned issue has been fixed. Now, the user is not facing any exception errors while loading the bulk-scanned documents**.**

Author: Tejaswini Srinivas

261: Core Bugs # 128655: Uploading of selected files in the 'Batch Image Upload' popup in the 'Scanning' screen is not working.

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

Navigation Path: Go Search — Scanning — Start Batch Upload button --- click on Select button in Batch Image Upload popup and select a file — click on Upload button in Batch Image Upload pop up.

Functionality 'Before' and 'After' release:

Before This release, here was the behaviour. In the Scanning screen, the Upload button was not working in the Batch Image Upload pop up.

With this Release, the above mentioned issue has been resolved. Now, in the Scanning screen, the Upload button is working in the Batch Image Upload pop up and user is able to upload the file.

Author: Tejaswini Srinivas

262: Core Bugs # 128758: Scanning: Uploaded PDF files are not displayed within the frame.

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

Navigation Path: My office - Scanning -Click on Start Batch upload - upload multiple PDFs - view the PDF.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the scanning, the uploaded PDF files were not displayed within the frame when viewed.

With this release, the above mentioned issue has been resolved. Now, the width of the PDF frame has been modified and now the uploaded PDF files can be viewed within the frame without any issues under the scanning screen.

Author: Tejaswini Srinivas

263: Core Bugs # 128842: Scanning: Metadata tab for lab reviewers is not appearing for Scanned Medical Records.

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

Navigation Path: My office - Scanning - Upload a PDF file - Select Record Type as 'M:L;Lab Results with Review – Save the Record and check the Metadata tab.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The Metadata tab with the list of reviewers was not displayed consistently on uploading a PDF file.

With this release, the above mentioned issue has been resolved. Now, the Metadata tab appears with the list of reviewers drop down consistently on uploading a PDF file.

Author: Lavanya Gowdru

264: Core Bugs # 128964: Scanning: Out of Memory Exception was thrown.

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

Navigation Path: Scanning --- 'Scan New Image' icon --- Scan the records --- Click on Save.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. While performing Scanning, the user would receive an out of memory' exception and an error was being logged in the errorlog table.

Exception: 'Out of memory'

With this release, the above-mentioned issue has been resolved. Now, the above exception is not logging in the errorlog table while functioning around Scanning.

Author: Lavanya Gowdru

265: Core Bugs # 129483: Description: Scanning: When uploading records to client files using the Scanning feature, the Provider chosen during the upload process is not reflected on the CM Events list page.

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

Prerequisite: Scan/Upload the records with Client events Association through the below **navigation path:**

Path 1: Scanning --- 'Scan New Image' icon --- Scan the records --- Select the 'Client Events' association --- Enter the required values --- Click on Save.

Path 2: Scanning --- 'Upload New Image' icon --- Upload the records --- Select the 'Client Events' association --- Enter the required values --- Click on Save.

Navigation Path: 'Client' search – 'CM Events' screen – 'CM Events' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user attempted to upload records to client files using the Scanning functionality, the selected Provider was not updating on the 'CM Events' list page, and instead, NULL values were displayed in the Provider column.

With this release, the above-mentioned issue has been resolved. Now, the selected Provider is displayed in the 'CM Events' list page, when uploading records to client files using the Scanning functionality.

SCM Methadone

Reference No	Task No	Description
266	EII #128646	Changes are implemented to MAT Edit Dosage Pop up under the MAT Management details screen.
267	EII #128634	MAT Management: The 'Completed' status is removed from the Current Status dropdown in the 'MAT Current Status popup'.
268	EII #127510	MAT Suboxone dosing workflow is implemented.
269	EII #127509	The Calibration Workflow is implemented in the MAT management screens.

Author: Smruthi Srikanth

266: EII # 128646: Changes are implemented to MAT Edit Dosage Pop up under the MAT Management details screen.

Release Type: Change **Priority:** Urgent

Navigation Path 1: 'Administration' - 'Orders' - 'Orders' list page - New -'Order Details' screen - Select 'Medication' Order Type - Enter the required fields - Select (Medication Assisted Treatment (MAT), Machine ConnectionRequired, Take Home Allowed) = Yes ,under 'Medication Assisted Treatment' section - Save.

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

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

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

Navigation Path 5: 'My Office' – 'MAT Management' list page – Click on 'Dispense' icon for the 'Client' Medication to be dispensed – 'MAT Management Details' -Click on required dosage in the Dispense information section-MAT Edit Dosage Pop up.

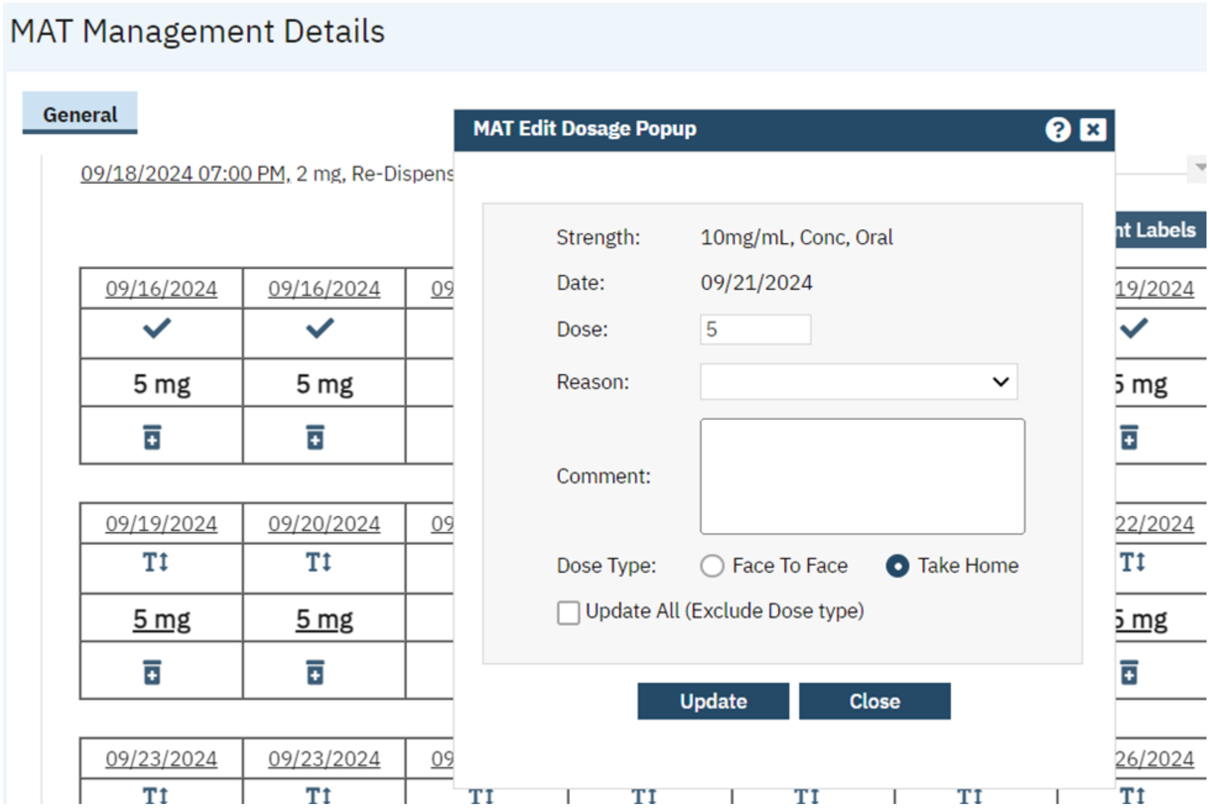
Functionality 'Before' and 'After' release:

Purpose: The user should be able to Edit a dose (when there is a one time edit and not creating new order) without impacting the type of dosing (Face to Face vs. Take Home).

With this release, for the selected date, the users will be able to update 'Dose' value and 'Dose Type' in the 'MAT Edit Dosage Popup' screen. The users can click on the 'Update All' checkbox to change 'Dose' for all the dates in the medication.

The following changes are made in the 'MAT Edit Dosage Popup':

- The 'Convert to' label is renamed to 'Dose Type'.
- The 'Update All': When the 'Update All' checkbox is selected, the system updates all the Fields except for the 'Dose Type'.
- The users can update each entry individually, if they changed the Dose type 'Adhoc'.



~~**Author:** Smruthi Srikanth~~

~~**267: EII # 128634: MAT Management: The 'Completed' status is removed from the Current Status dropdown in the 'MAT Current Status popup'.**~~

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

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

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

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

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

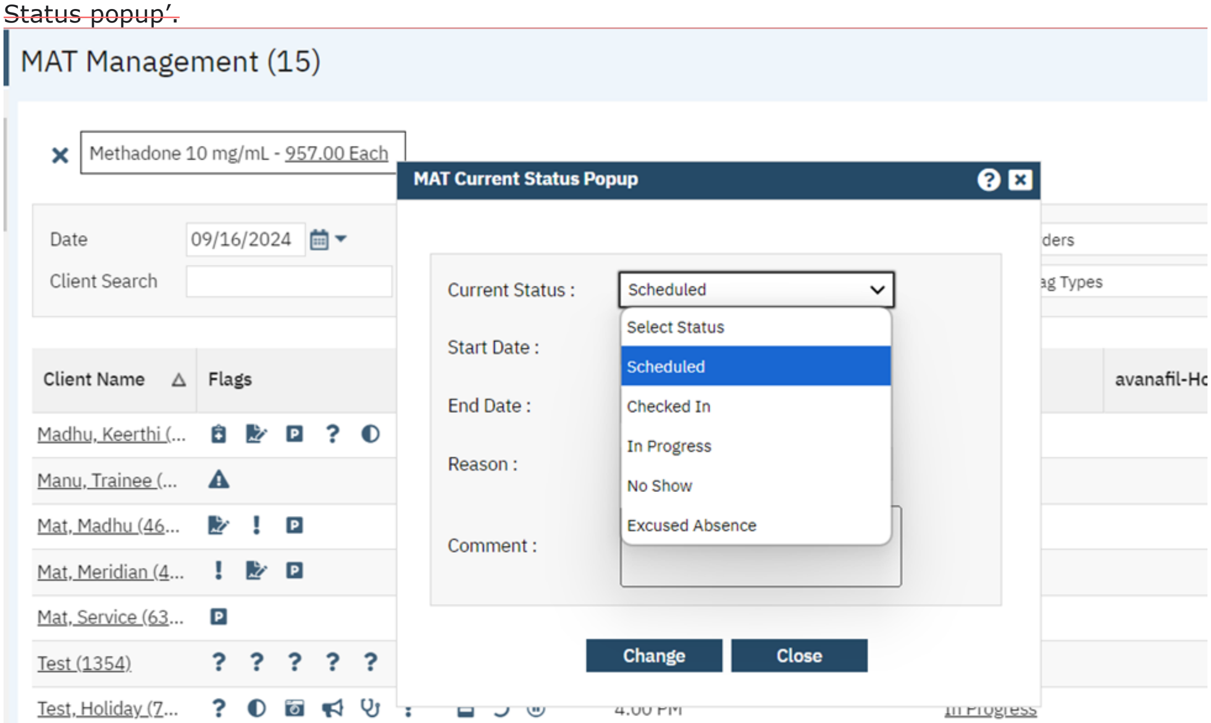
~~**Navigation Path 5 :** My Office' – 'MAT Management' list page' – Click on 'Status' hyperlink for the required client-MAT current Status Pop up.~~

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

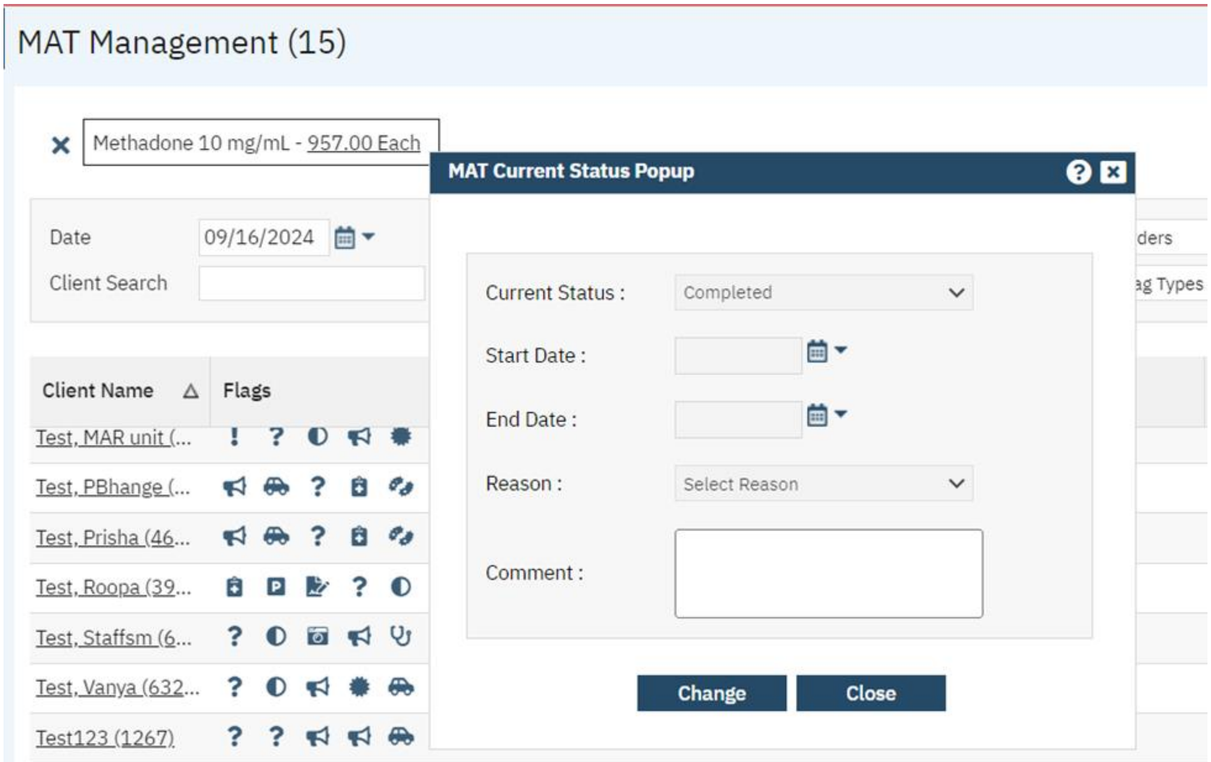
~~**Purpose:** The MAT Management screen currently includes an option for staff to manually change the Status to Completed, but the users all agreed that a Completed status should only apply when a client is actually~~

~~dispensed their dose. The Completed status is auto-applied when a client receives their dose so it does not need to be available in the Status dropdown for manual selection.~~

~~With this release, the 'Completed' status is removed from the Current Status dropdown in the 'MAT Current Status popup'.~~



~~If the status is 'Completed' , then in 'MAT Current Status popup', the current status shown as "Completed" and the text field is disabled. The user will be allowed to add comments. The Completed status is auto-applied when a client receives their dose so it does not need to be available in the Status dropdown for manual selection.~~



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

~~**268: EII #127510: MAT Suboxone dosing workflow is implemented.**~~

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

~~**Navigation Path 1:** Administration – Recodes– Select 'SetMedicationForMATMultiInventoryDispense' value from 'All Recode Categories' dropdown field -Click on Apply filter-Click on SetMedicationForMATMultiInventoryDispense hyperlink- Recode Detail' screen – enter required details – click on Insert – click on Save.~~

~~**Navigation Path 2:** 'Administration' - 'Orders' - 'Orders' list page - New - 'Order Details' screen - Select 'Medication' Order Type - Enter the required fields - Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes under 'Medication Assisted Treatment' section - Save.~~

~~**Navigation Path 3:** My Office – 'Medication/Lot/Bottle' list page – New - 'Medication/Lot/Bottle Details' screen - Enter the required fields – Save.~~

~~**Navigation Path 4:** My Office – 'MAT Dispenser' list page – New - 'MAT Dispenser Detail' screen – 'General' tab - Enter the required fields – Save.~~

~~**Navigation Path 5:** 'Client' - 'Client Orders' list page - New - 'Client Order details' screen - Select the Order created in Navigation Path 2 - Enter the required fields – Insert - Save and sign.~~

~~**Navigation Path 6:** 'My Office' – 'MAT Management' list page – Connect User – Enter required fields - Click on 'Dispense' icon for the respective 'Client' Medication to be dispensed – 'MAT Management Details' screen.~~

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

~~**Purpose:** A single order is written with total dosage (e.g. 10mg). Patients are typically dosed at 2, 4, 8, 12 or 16. The Higher doses are normally done as split doses with half taken in the clinic and the other half at home.~~

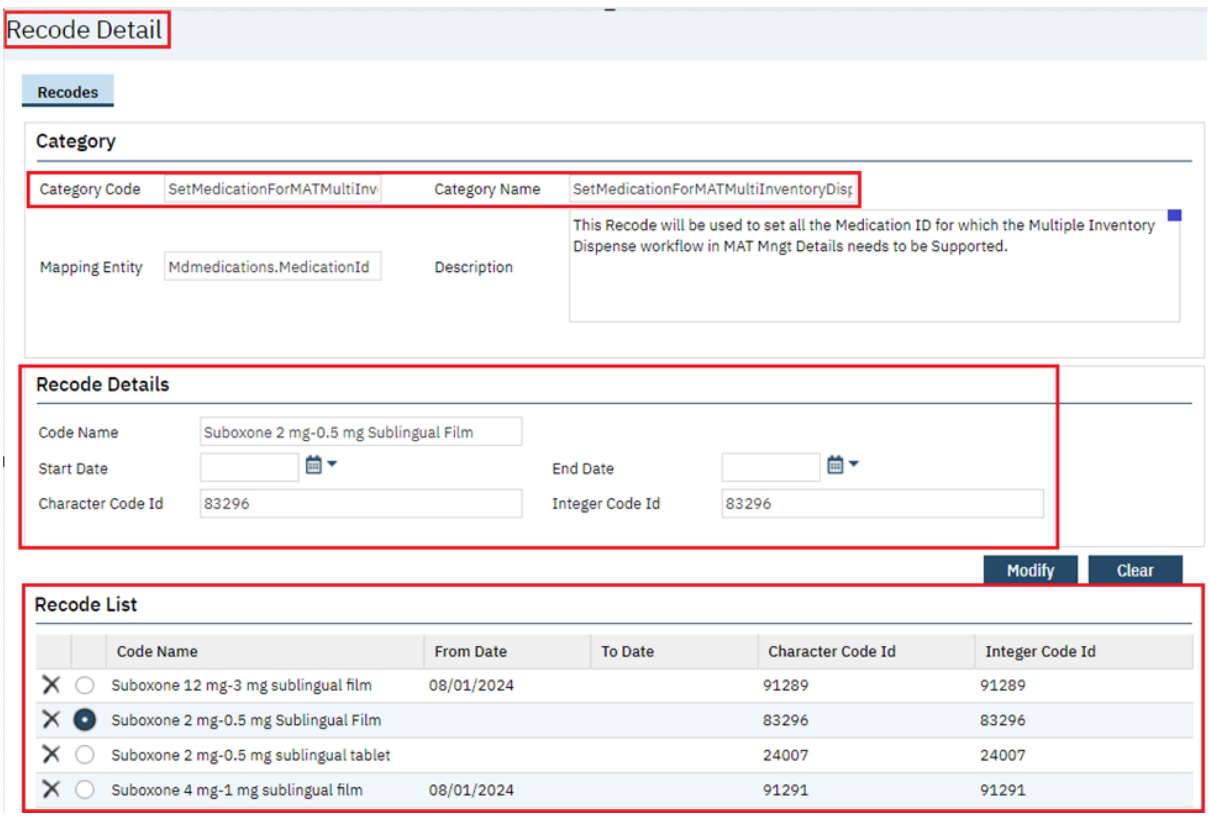
~~With this release, in the MAT module, additional functionality has been implemented.~~

~~1.A new Recode Code category 'SetMedicationForMATMultiInventoryDispense' is implemented.~~

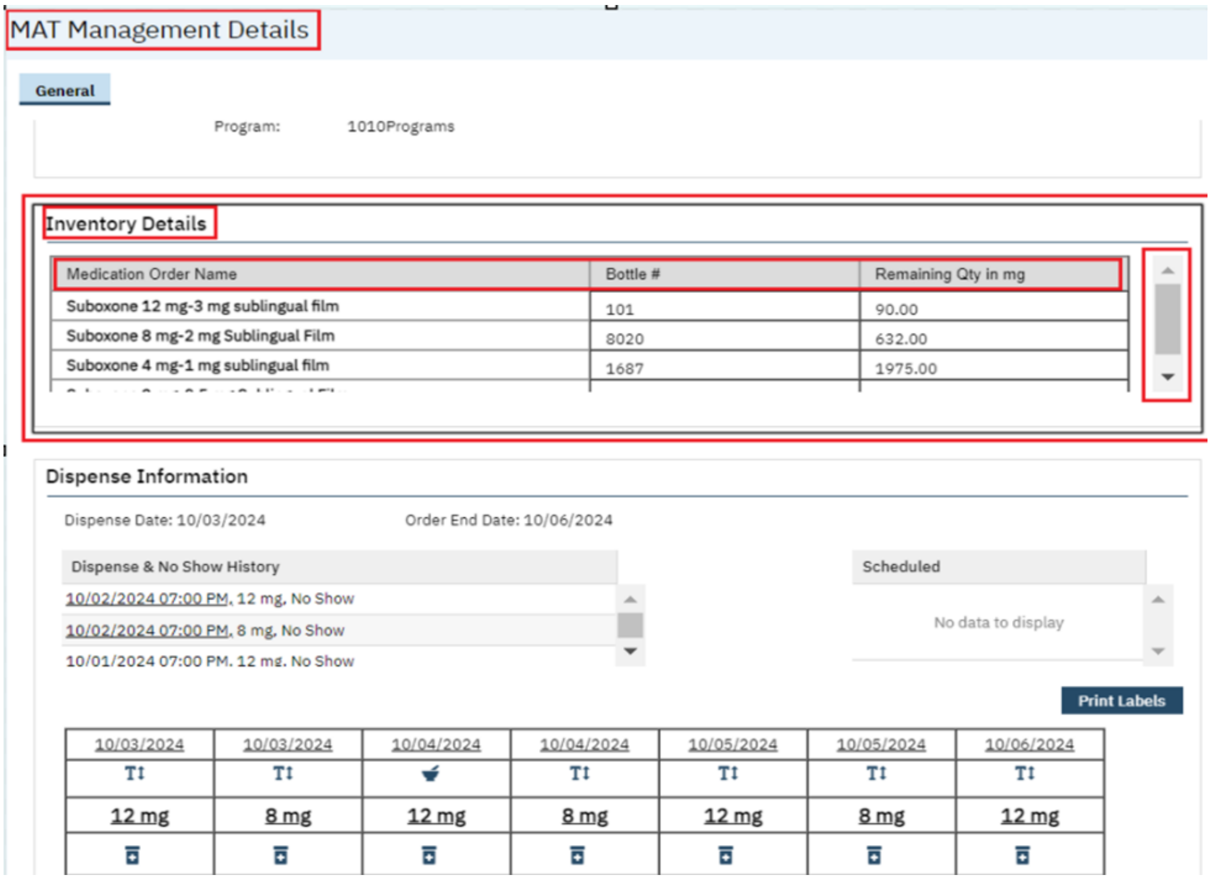
~~If this Recode has been end dated by specifying the From Date and To Date, it has been considered as Inactive.~~

~~**IntegerCodeId:** Medication Id from the MDmedications Table.~~

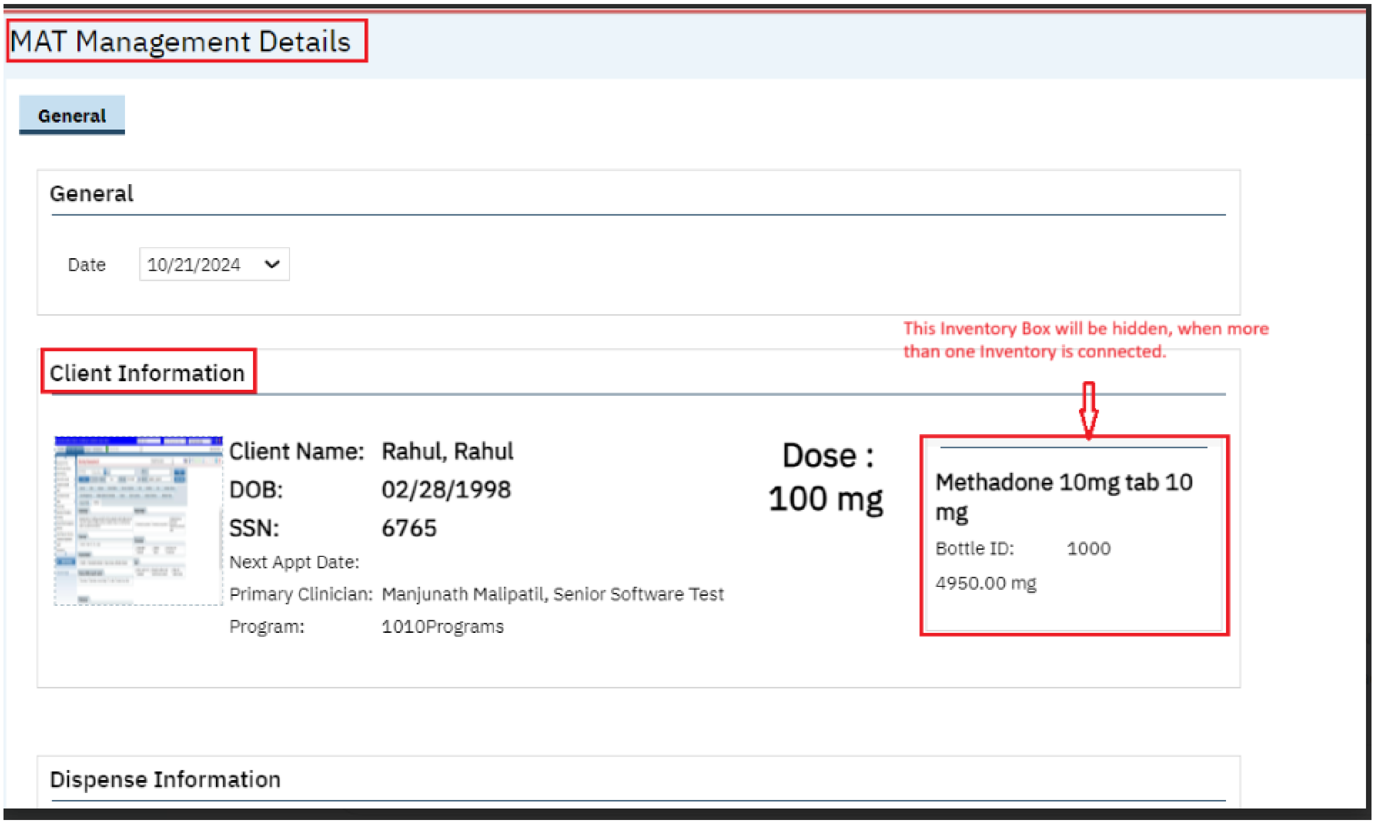
~~Example: MedicationId of Suboxone Medications.~~



~~2.MAT Management Details: In the 'General' tab, a new scrollable 'Inventory Details' section has been added below the 'Client Information' section.~~



~~This **Inventory Details** Section will be displayed for those Medications (in Multiple Inventories) listed in the Recode category -SetMedicationForMATMultiInventoryDispense. The 'Inventory Box' part (Order name, Lot#, Bottle#, <mg>, Color indicator) in the Client Information Section is hidden as that display is for only one inventory. (Please see the screenshot below)~~



~~**Medication Order Name:** To be displayed in the Format <Medication Order> <Strength>.~~

~~**Bottle #:** Displays the Bottle number to which the Machine/Inventory is connected to.~~

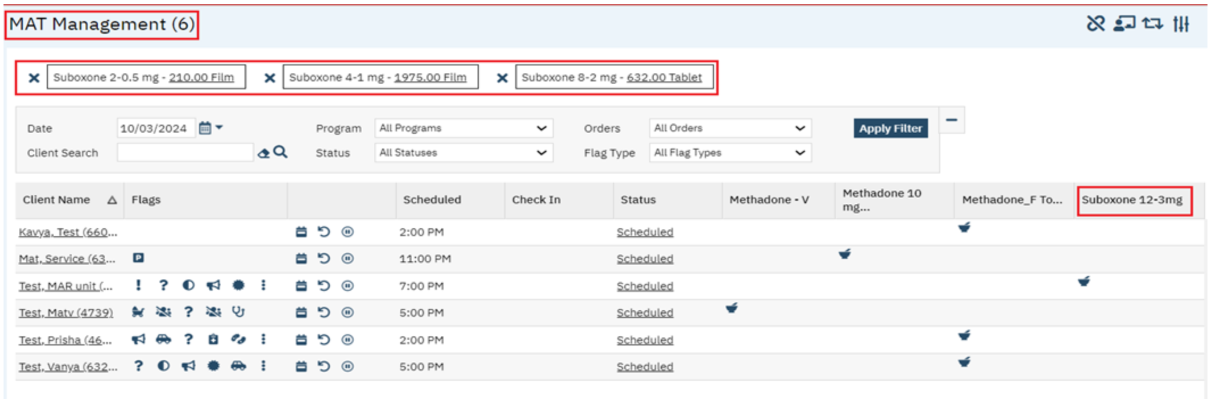
~~**Remaining Qty in mg:** Displays the remaining contents of the bottle.~~

~~This field is auto updated upon each dispense.~~

~~**Lot#:** This field has been removed from the 'Inventory details' box.~~

~~The application Compares the 'Client order' Medication and Forms (Either films or Tablet) and pull all the Machines and Inventory connected via list page in this section for the Medication. (Either films or Tablet).~~

~~**Example:** Client order is for **Suboxone 8 mg-2 mg Sublingual Film** but Inventories of 8,4 and 2mg are connected in the List page, pulls all the Inventory of that Medications in this Section.~~



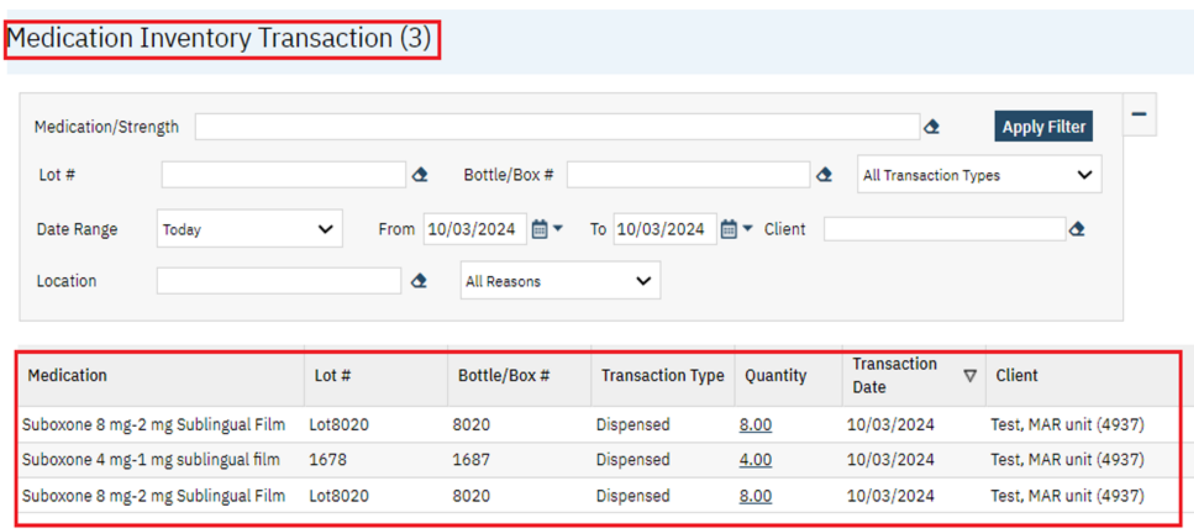
~~When Multiple Inventories of the same mg values are connected, then the Medication is dispensed from the Oldest created Lot/bottle.~~

~~If any of Inventories does not have sufficient quantity, those are disconnected and the new ones in List page are connected and Dispensed.~~

~~On the Dispense, Inventory Transaction to be created for each film/pill. (12mg, 8mg, 4mg and 2mg Transactions)~~

~~One Transaction for each inventory is created.~~

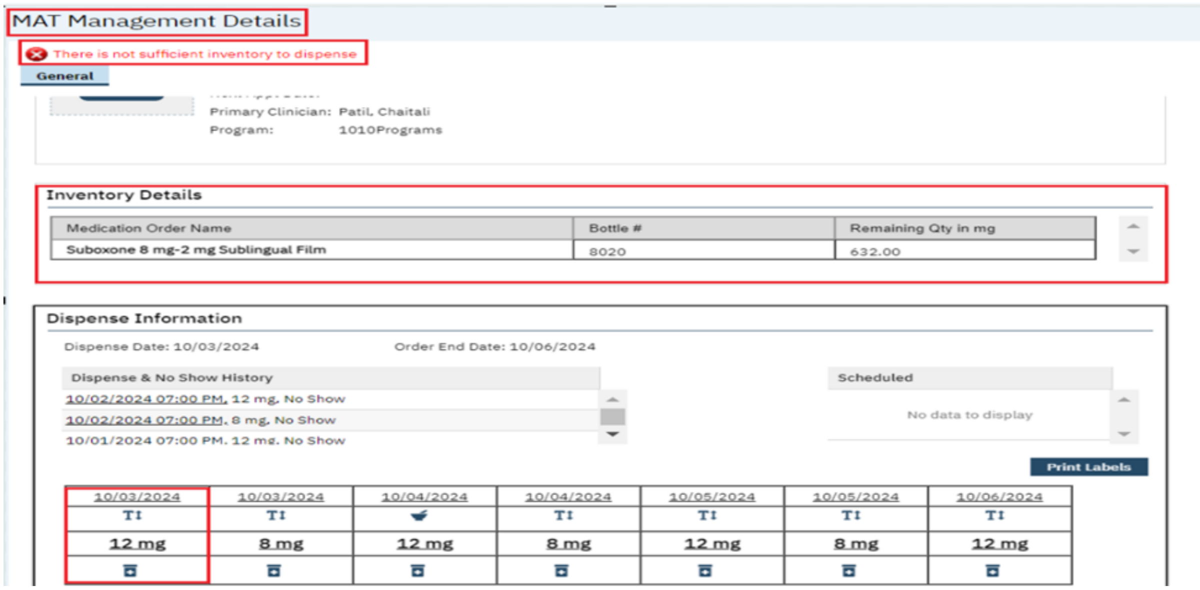
~~**Example:** If 12 mg medication needs to be dispensed, then one transaction for 8mg film strip and one transaction for 2mg (2mg films) film strip to be done.~~



Medication	Lot #	Bottle/Box #	Transaction Type	Quantity	Transaction Date	Client
Suboxone 8 mg-2 mg Sublingual Film	Lot8020	8020	Dispensed	8.00	10/03/2024	Test, MAR unit (4937)
Suboxone 4 mg-1 mg sublingual film	1678	1687	Dispensed	4.00	10/03/2024	Test, MAR unit (4937)
Suboxone 8 mg-2 mg Sublingual Film	Lot8020	8020	Dispensed	8.00	10/03/2024	Test, MAR unit (4937)

~~If the Client Dose cannot be dispensed based on the connected inventory, then the system will not allow the dispense to continue and a validation message to be displayed as "There is not sufficient inventory to dispense".~~

~~**Example:** Client dispense is for 12mg, but the nurse only connected to inventory for 8mg films. In this case, the nurse would need to connect to the 2mg and/or 4mg films to perform the dispense.~~



~~**Data Model Changes:**~~

~~The MATStrength column is added to the MATMedicationProcedureCodes table.~~

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

~~269: EII # 127509: The Calibration Workflow is implemented in the MAT management screens.~~

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

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

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

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

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

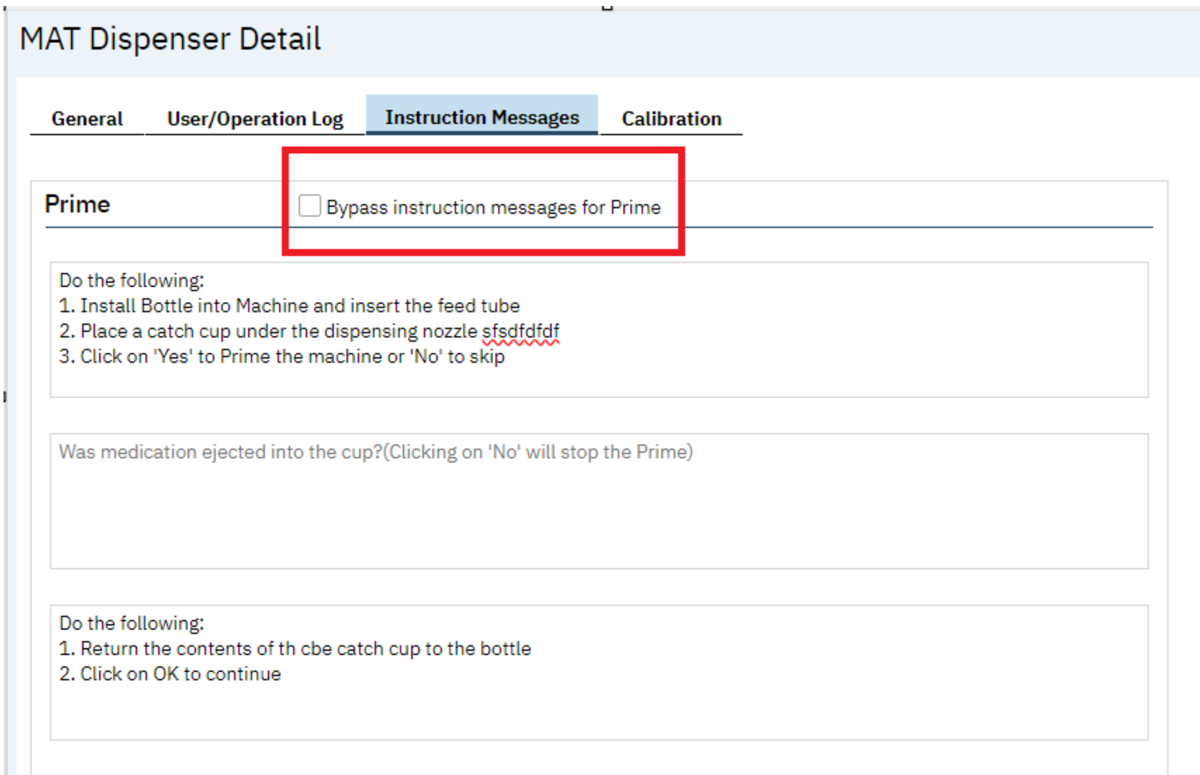
~~**Navigation Path 5:** 'My Office' – 'MAT Management' list page – Calibrate - Connect User – Enter required fields - Click on 'Dispense' icon for the respective 'Client' Medication to be dispensed – 'MAT Management Details' screen.~~

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

~~**Purpose:** The current calibration steps instruct the users to connect a bottle of water to the pump, but some customers calibrate with the actual methadone solution.~~

~~With this release, the following changes are added in the 'MAT Dispenser Detail' Screen.~~

~~1.MAT Dispenser Detail: In the 'Instruction Messages' tab, under 'Prime' Section: A new 'Bypass instruction messages for Prime' checkbox has been added.~~

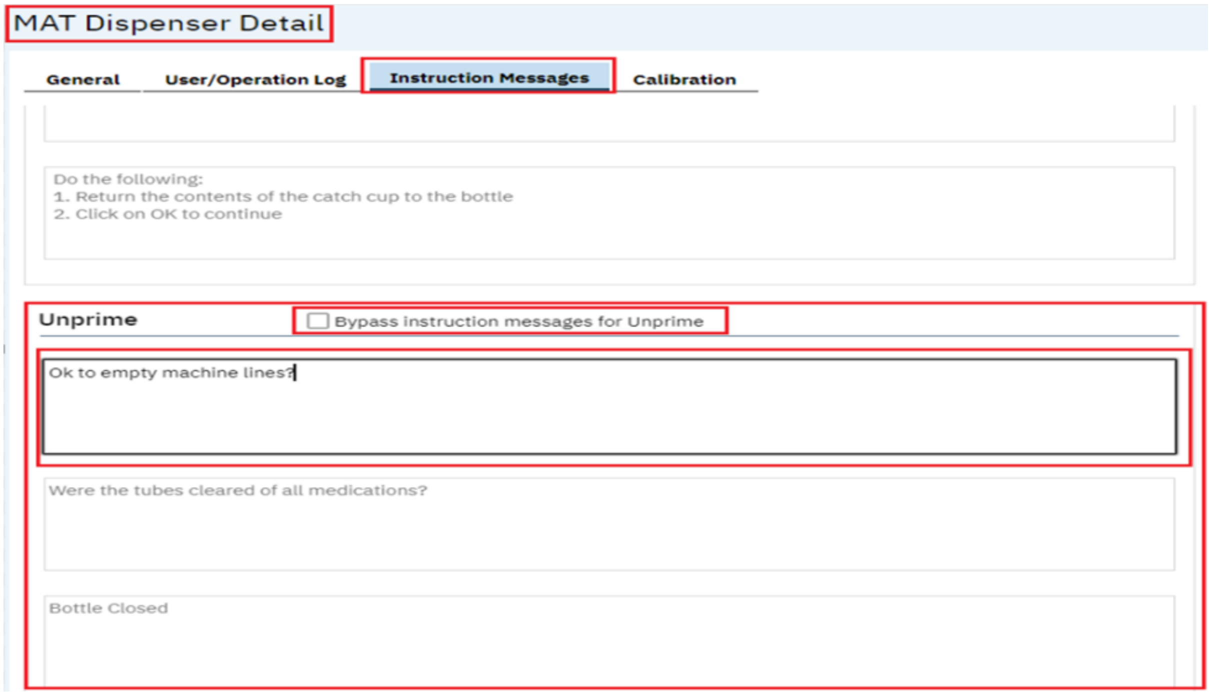


~~When the checkbox is checked, all the Instruction Messages will not be displayed. Instead 'Machine Primed' pop-up will be displayed with an 'OK' button under the MAT Management screen.~~

~~Below the 'Prime' section, a new section 'Unprime' has been added with 'Bypass instruction messages for UnPrime' checkbox.~~

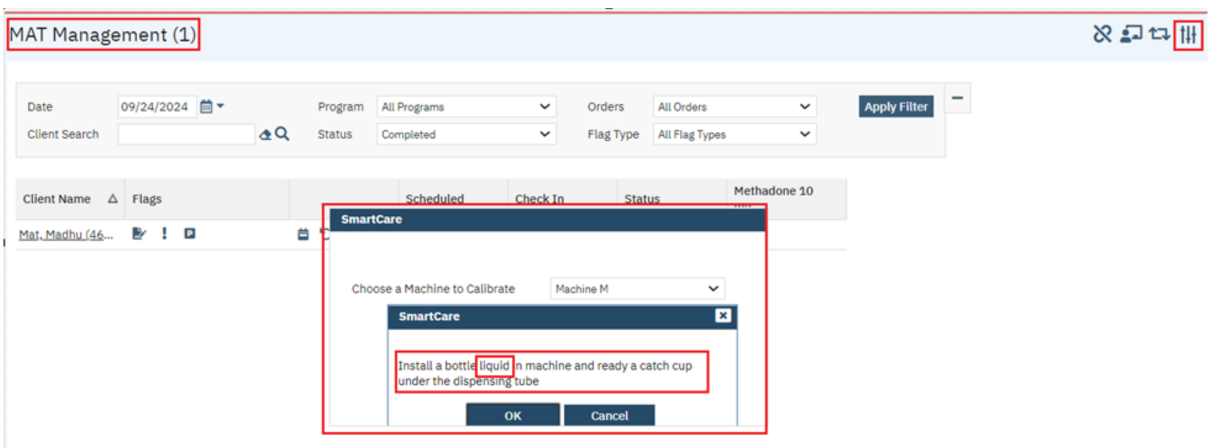
~~The Unprime section is displayed with below mentioned textboxes.~~

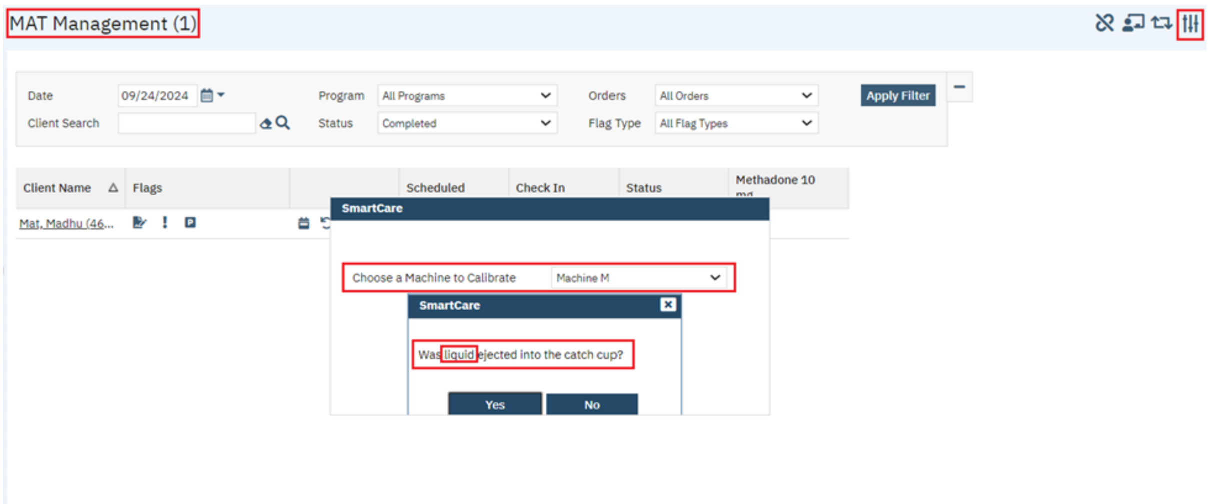
- ~~Ok to empty machine lines?~~
- ~~Were the tubes cleared of all medications?~~
- ~~Bottle Closed.~~



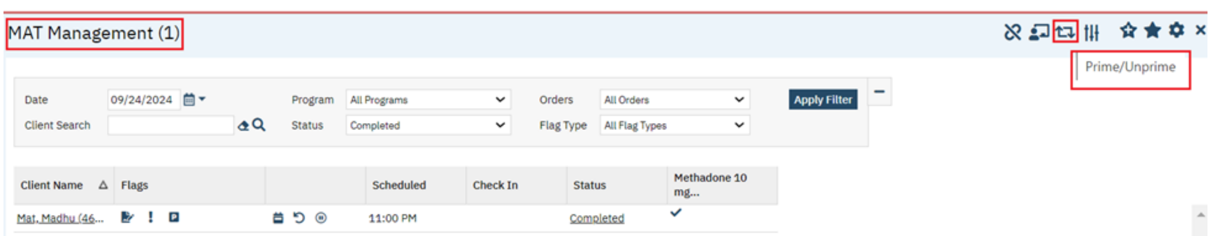
~~MAT Management Screen:~~

~~1.Choose a Machine to calibrate pop up: the text "water" has been replaced with a generic term "liquid" in the pop up.~~



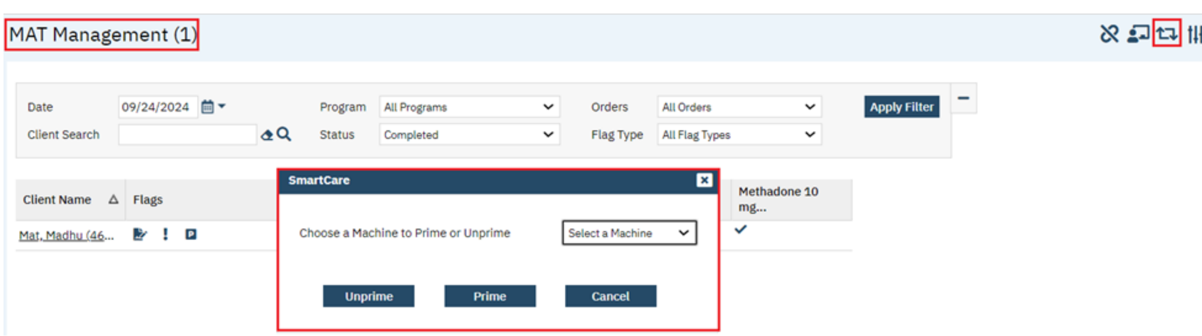


~~3. MAT Management: A new 'Prime/Unprime' icon has been added between Connect User and Calibration icon in the Toolbar.~~



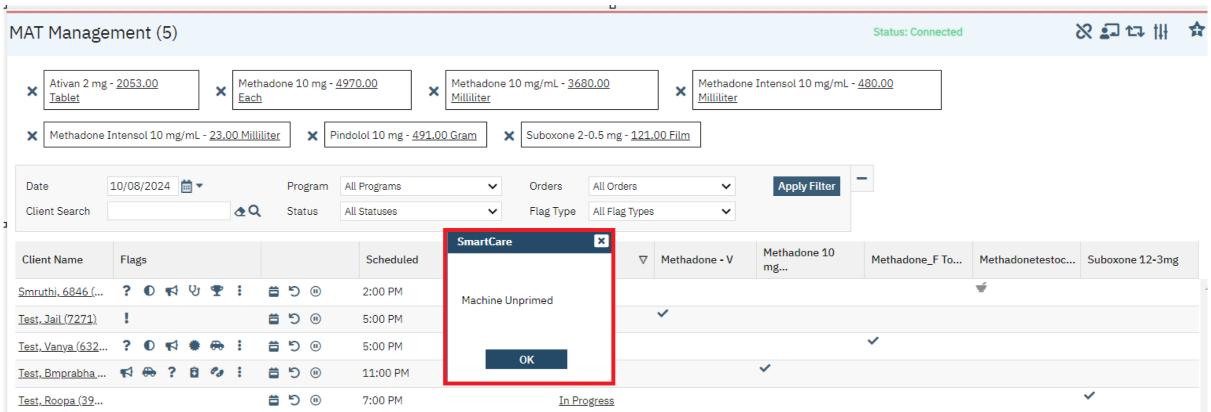
~~On hover displays 'Prime/Unprime'.~~

~~On click of 'Prime/Unprime' icon, 'Choose a Machine to Prime or Unprime' popup is displayed.~~



~~**'Choose a Machine to Prime or Unprime' dropdown field**: Displays the names of machines that are available to the user to select.~~

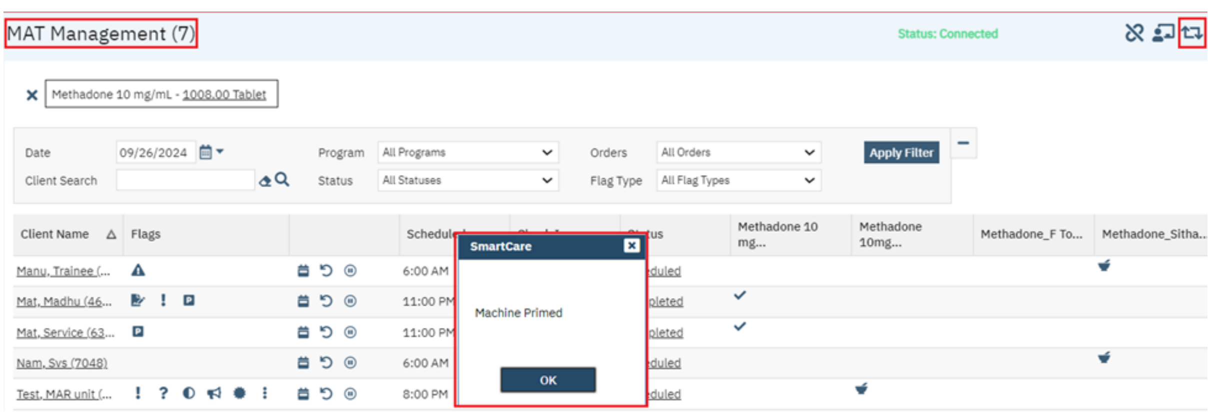
~~**'Unprime' button**: When the user selects the machine name from the drop down and clicks Unprime Button, 'Machine Unprimed' pop up is displayed with 'OK' button along with a close(X) icon.~~



~~**Ok:** This will inform the user that the machine has been Unprimed by Clicking on 'OK' in the pop up.~~

~~Click on (X) icon in the pop up, it will close the pop up.~~

~~**'Prime' button**: When the user selects the machine name from the drop down and clicks 'Prime' Button, 'Machine Primed' pop up is displayed with 'OK' button along with a close(X) icon.~~



~~**Ok**: This will inform the user that the machine has been primed by clicking on 'OK' in the pop up.~~

~~Click on (x) icon in the pop up, it will close the pop up.~~

~~**Cancel:** When the user clicks on cancel button, it closes the pop up and machine is not primed.~~

~~Data Model Changes :~~

~~The columns UnprimeMessageOne,UnprimeMessageTwo,UnprimeMessageThree,BypassInstructionMessageForPrime,BypassInstructionMessageForUnprime columns are added in the MATDispenser table.~~

Screens

Reference No	Task No	Description
270	EII # 128429	Screens allowing the copying of Screens to create new ones when the 'Allow Addition By Affiliate' key was set to 'No'.
271	Core Bugs #129133	Focus highlighter is causing difficulty for the user to identify the focused elements when the user uses the 'Tab Indexing on radio buttons and checkbox items.
272	EII # 128409	Implementation of 'Decision Support Intervention Documents' section in 'Screen Details'.

Author: Boovendiran Chinnusamy

270: EII # 128429: Screens allowing the copying of Screens to create new ones when the 'Allow Addition By Affiliate' key was set to 'No'

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

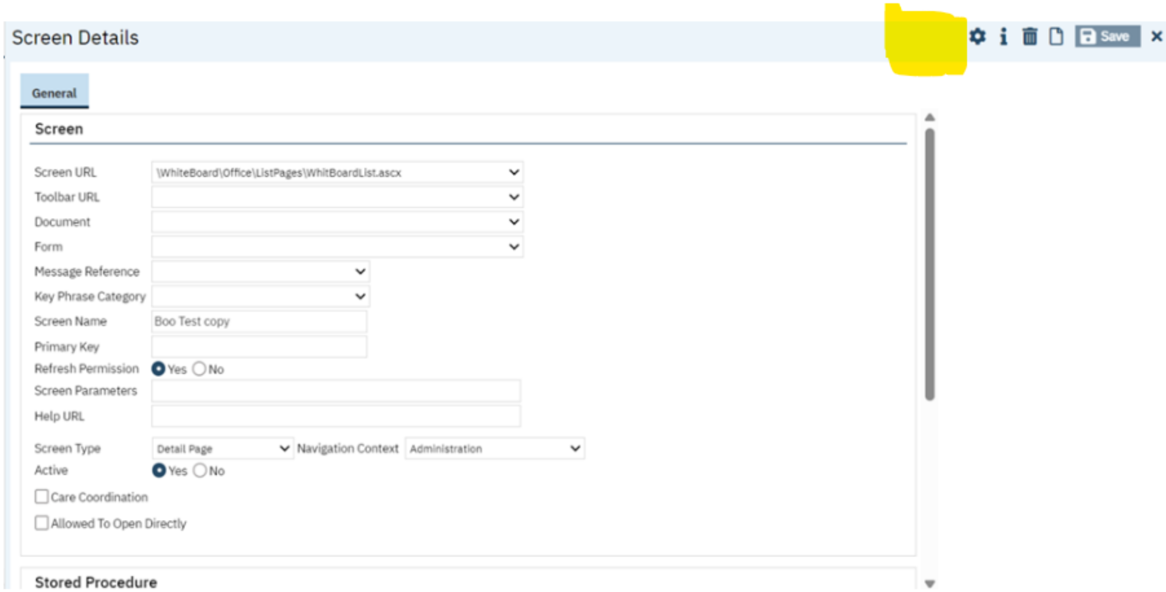
Navigation Path 1: 'Administration' - 'Primary Data Sync' Details screen – Select Screens hyperlink – set the 'Allow Addition By Affiliate' checkbox to 'No' – Save.

Navigation Path 2: 'Administration'– Screens – Select any screen by clicking on the screen name.

Functionality 'Before' and 'After' release:

Purpose: This enhancement will prevent user not to add Screens on Affiliate environments if the 'Allow Addition By Affiliate' key was set to 'No'.

With this release, the copy button (before Settings icon) will not be visible, when the 'Allow Addition By Affiliate key' is set to 'No' in Affiliate environments.



Author: Sunil Belagali

271: Core Bugs: 129133: Focus highlighter is causing difficulty for the user to identify the focused elements when the user uses the 'Tab Indexing on radio buttons and checkbox items.

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

Navigation Path: Login to the 'SmartCare' application – Open any Screens that has Radio buttons and Checkboxes.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In any screen, when the user used 'Tab indexing' over radio buttons or checkbox items, the focus highlighter was so subtle that it caused difficulty for the user to identify the focus on elements.

With this release, the above-mentioned issue has been resolved. Now, when users use 'Tab indexing' over radio buttons or checkbox items in any screen, the focus highlighter is visible, allowing users to easily identify the focused elements.

Author: Santosh Huggi

272: EII # 128409: Implementation of 'Decision Support Intervention Documents' section in 'Screen Details'.

Release Type: Change **Priority**: Onfire

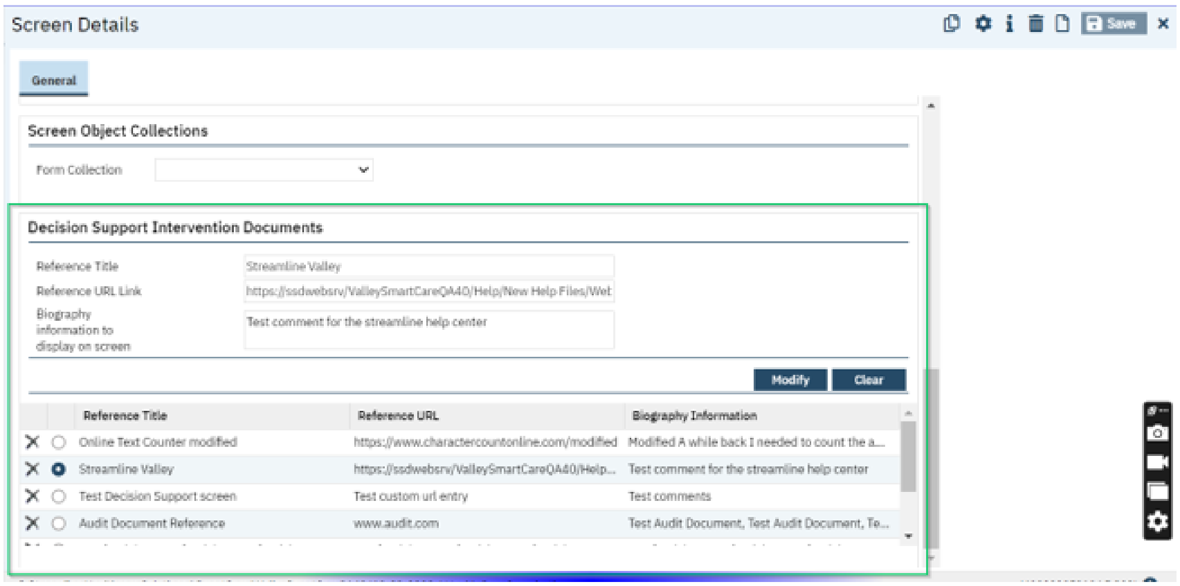
Navigation Path: 'Administration' – 'Screens' – 'Screens' list page -- click on any hyperlink of 'Screen Name' -- 'Screen Details' screen – 'General' tab – 'Decision Support Intervention Documents' section.
Purpose: To meet the requirement of making the Source Attribute information available to users of the documents or services.

Functionality 'Before' and 'After' release:
With this release, a new section called 'Decision Support Intervention Documents' has been implemented under the 'General' tab of the 'Screen Details' screen with the below mentioned fields.

- **Reference Title** – It is a Textbox.
- **Reference URL Link** - It is a Textbox.
- **Biography information to display on screen** – It is a Text Box.

The user is able to enter the details in the above fields. On clicking on the 'Insert' button, it will be inserted in the Grid. The grid will be displayed with the following header names along with the radio button and delete icon.

- **Reference Title**
- **Reference URL**
- **Biography Information**



The inserted record details will be displayed on the 'DSI Source References Information' popup screen for the 'Documents' and 'Services Notes' upon clicking on 'DSI Source References' icon on the toolbar.

Data Model Change: A new table 'DecisionSupportInterventionScreens' is added.

Services

Reference No	Task No	Description
273	Core Bugs # 128856	Diagnosis Validation - ensure only valid diagnosis codes are included in the diagnosis document.
274	Core Bugs # 129010	File upload changes duration.
275	Core Bugs # 129243	Due to an error message user is unable to Import Services.
276	Core Bugs #129169	Services list page taking more time to display the data.
277	EII # 128612	Imported Batch Service List - Screen changes

Author: Suganya Sivakumar

273. Core Bugs # 128856: Diagnosis Validation - ensure only valid diagnosis codes are included in the diagnosis document.

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

Navigation Path: NA

Functionality 'Before' and 'After' release:

This task is created to revert the fix provided for Core Bugs: 128293.

Author: Niroop Hassan

274. Core Bugs # 129010: File upload changes duration.

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

Navigation Path 1: 'Administration' – 'Procedure/Rates' – 'Procedure/Rates' list page – Click on required Procedure name hyperlink – 'Procedure Code Details' page – Check the checkbox option for 'Allow Decimals (2 Places)' and click on 'Save' icon.

Navigation Path 2: 'My Office' – 'Batch Service Import Files' - 'Batch Service Import Files' list page – Click on 'Upload Import File' icon – 'Upload New Services' popup – Click on 'Select' button – Select the required file which having the above mentioned ProcedurecodeId, Duration entered with decimal points and click on 'Upload' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user uploaded a file having above mentioned ProcedurecodeId and Duration entered with decimal points, the Service which was created was having duration rounded to the closest whole number.

With this release, the above-mentioned issue has been resolved. Now, when a file is uploaded with the above ProcedurecodeId and a Duration entered with decimal points, the Service created will retain those decimal points in the Duration.

Author: Niroop Hassan

275. Core Bugs # 129243: Due to an error message user is unable to Import Services.

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

Navigation Path: 'My Office' menu – 'Batch Service Import Files' - 'Imported Batch Service List' page – Click on 'Upload Import File' icon from Toolbar – 'Upload New Services' popup – Click on 'Select' button – Select the required file and click on 'Upload' button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to upload the file in the 'Batch Service Import Files' screen, the following error message was displayed.

Error Message: "Unspecified error"

With this release, the above-mentioned issue has been resolved. The users can now upload files in the 'Batch Service Import Files' screen without encountering any error message.

Author: Aishwarya Bommaklar

276. Core Bugs # 129169: Services list page taking more time to display the data.

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

Navigation Path: My Office -- Services -- 'Services' list page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user tried to open the 'Services' list page, it took more time to display the data.

With this release, the above-mentioned issue has been resolved. Now, the performance of the 'Services' list page has improved.

Author: Niroop Hassan

277. EII # 128612: Imported Batch Service List - Screen changes.

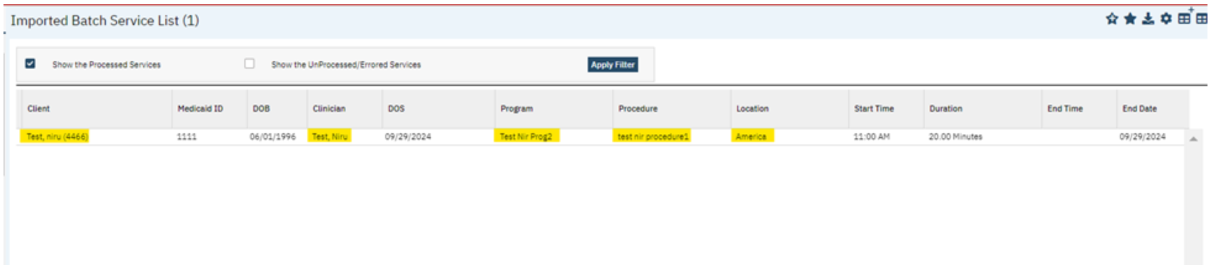
Release Type: Change | **Priority:** Urgent

Navigation Path: 'My Office' -- 'Batch Service Import Files' -- 'Batch Service Import Files' list page -- Click on 'Upload Import File' icon -- 'Upload New Services' popup -- Click on 'Select' button -- Click on the uploaded 'Import File Id' hyperlink -- 'Imported Batch Service List' page.

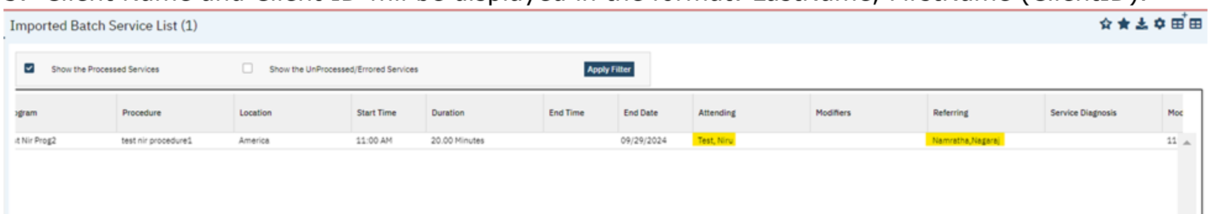
Functionality 'Before' and 'After' Release:

Purpose: Displaying the parameter names in the grid will make it easier for the user to know what each of those are. The Column configuration option will help the user setup list page views (column configuration) based on their needs.

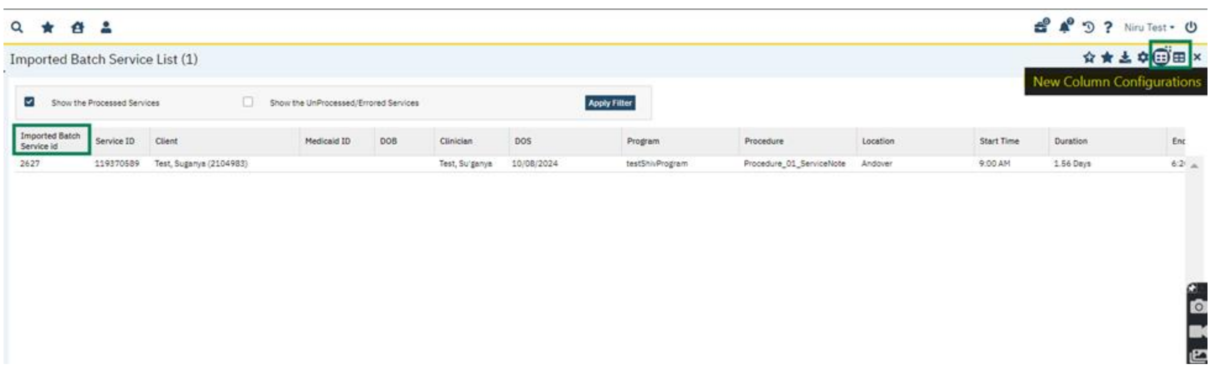
With this Release, the following changes have been done in the below fields
1. Names will appear in the specified columns instead of IDs when the Service is created.
Clinician
Program
Procedure
Location
Attending
Referring



2. If the Service creation fails due to a value mismatch or any error, then that value will be display the ID's. Example: If Program ID=1001 is not found while creating service, then the Program column for that row would display 1001.
3. Client Name and Client ID will be displayed in the format: LastName, FirstName (ClientID).



4.'New Column Configurations' is added in the 'Tool bar' section in 'Imported Batch Service List' page
5.The column name has been changed from 'Import Service Batch Service ID' to 'Imported Batch Service ID'.



Services/Notes

Reference No	Task No	Description
278	EII # 126692	Service Notes/ Group Services: Add a validation for Service Notes if a Staff is trying to sign the note at any time before the end time of the scheduled Service.
279	Core Bugs # 128738	Psychiatric Note: 'Same as Last Visit' checkbox issue.
280	Core Bugs # 128857	Recurring Service: A signed note is getting deleted along with the scheduled services
281	Core Bugs # 128888	Duration is not retained on add-on Psychotherapy
~~282~~	~~Core Bugs # 129113~~	~~Individual Service Note (C): cutting off Safety Plan in the PDF~~

283	EII # 126766	To display the Add-On code details on the PDFs generated for all the Service Notes.
284	Core Bugs #129138	Getting an Error Log entry in the errorlog table.
285	Core Bugs #129320	Psych Note PDF not displaying correctly after signature.
~~286~~	~~Core Bugs #129285~~	~~Individual Service Note (C): Inactive EBPs are showing on the PDF.~~
287	Core Bugs #129262	Error log was created in the service note.
288	Core Bugs #129139	Error message is logged in the ErrorLog table
289	EII #126264	The changes are added to the Add-on codes tab of the Service Detail, Service note and Group Service details screens.
290	EII #127591	Implementation of “Service Note Reviewer" screen for all the Service Notes.

Author: Suganya Sivakumar

278: EII # 126692: Service Notes/ Group Services: Add a validation for Service Notes if a Staff is trying to sign the note at any time before the end time of the scheduled Service.

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

Navigation Path 1: Login as an Author --- Select ‘Client’ -- ‘Services/Notes’ – ‘Service/Note’ List Page --- Click on New Icon --- ‘Service Note Details’ page -- Select Prog/Proc/Loc values -- Enter the ‘Service Time’ -- Enter all required fields -- Click on Save -- Sign the Service Note -- In the generated PDF Click on ‘ + ‘ More Detail icon --- Add the Co-Signer in the Signer field.

Navigation Path 2: Login as a Co-Signer – My Office -- Batch Signature – ‘Batch Signature’ List Page – ‘Document List’ section -- Select ‘To Co-Sign’ -- Click on ‘Apply Filter’ -- Click on the specific document to Co-Sign -- The PDF will display.

Navigation Path 3: My Office -- Groups – ‘Groups’ List page -- Click on New icon – ‘Group Details’ page -- Enter all the required fields – select ‘Mode of Delivery’ dropdown field -- Click on Save button -- Navigate to ‘Schedule’ tab -- Click on ‘New Group Service’ button – ‘Group Service Client popup’ will display -- Select Date of Service and Clients -- Click on Select button – ‘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.

Purpose: To ensure that the provider is not signing the service before the end time.

Functionality ‘Before’ and ‘After’ release:

With this release, the validation message is implemented in the ‘Service/Notes Detail’ screen and the ‘Group service Detail’ screen. Also, a new System configuration key called “SetNumberOfMinsToAllowSignatureBeforeServiceEndTime” is implemented, the validation message will display when the configuration key value is set to ‘0’ or ‘any positive number’.

1. When the user tries to sign the Service Note and the Group Service Note before the end time of the service, A validation message will be displayed.

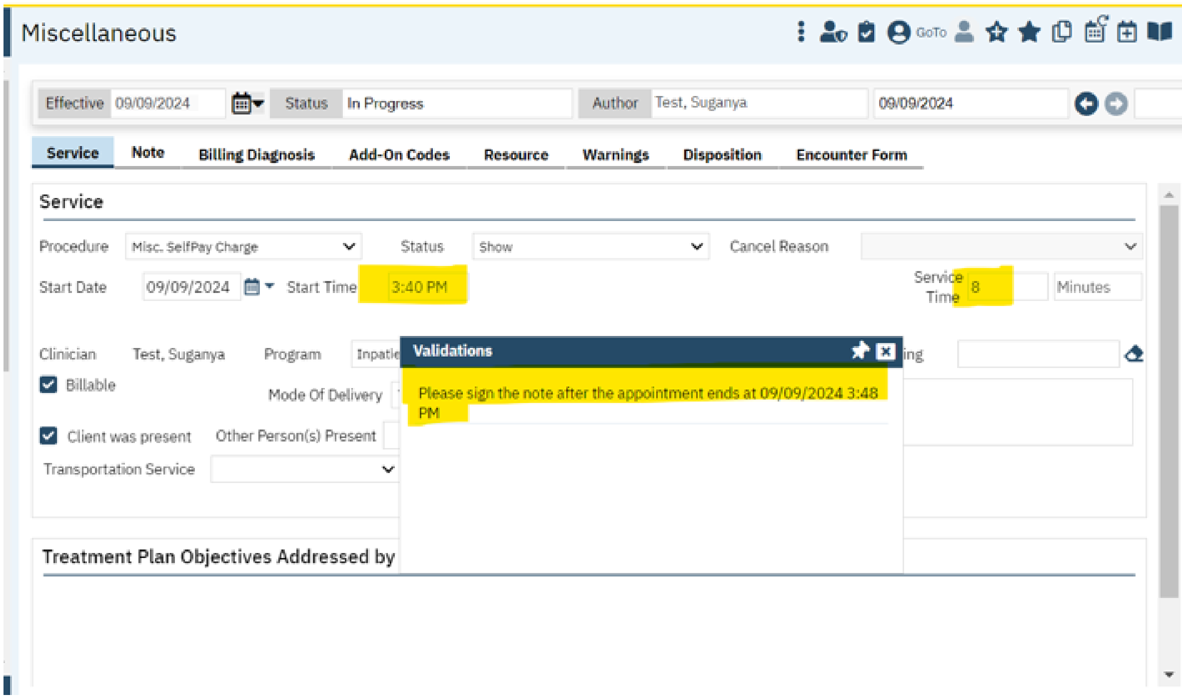
2. The Service Note and the Group Service Note can be signed once after the end time or any time after the service.

Example: If service end time is 1:00 PM, clinician can sign the note at 1:00 PM or any time after that.

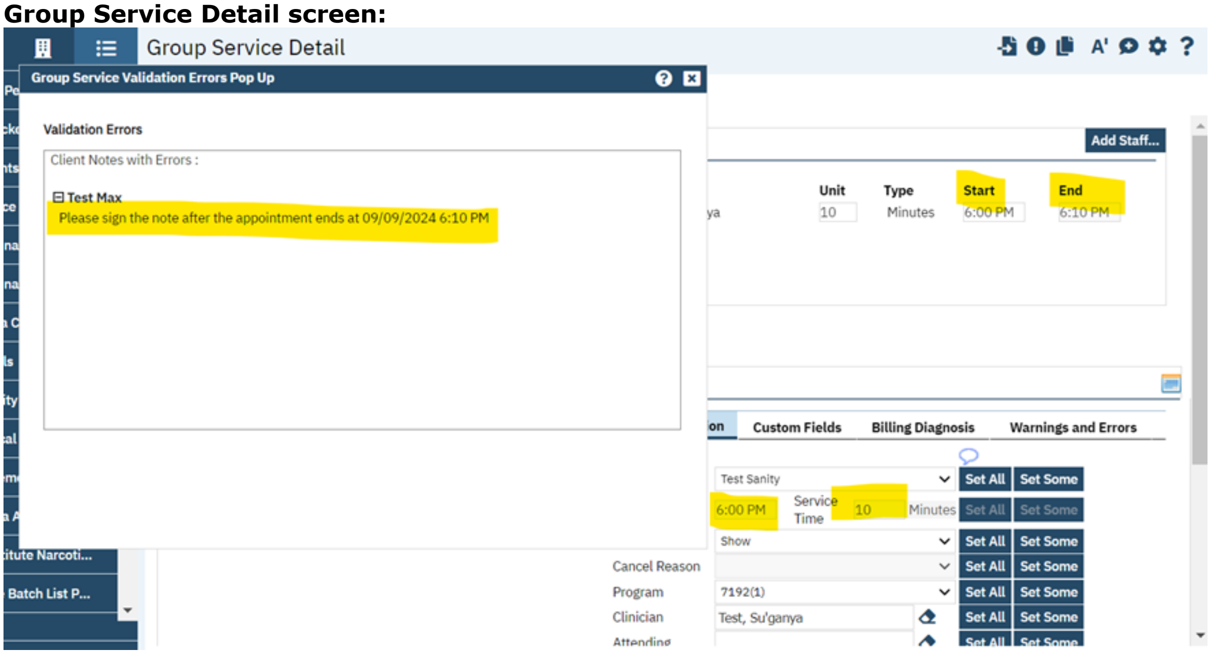
Validation Message:

Please sign the note after the appointment ends at <Date> <Time>

Service Note:



Group Service Detail screen:



'Batch Signature' screen: In the Document List section of the Batch Signature screen, the Service records will not display if the Service did not reach the scheduled end time. The Service records will display Only after the Service scheduled end time is reached.

Configuration Key Details:

Key: SetNumberOfMinsToAllowSignatureBeforeServiceEndTime

Read Key as: Set Number of Minutes to Allow Signature before Service End Time.

Allowed Values: None, 0, any positive number

Default Value: None

Modules: SCM Clinical 2/Individual Service Note

Description:

This is a new feature being added to the core product by introducing a system configuration key. Currently, Service Notes can be signed at any point of time even before the Service starts or ends. The purpose of this key is to determine whether Service Notes can be signed before the actual end time of the Service or not. This change will be applied to Group Service Details, Service Note, Batch Signature screens.

A) If the key-value is set to "None",

- Validation message will not be displayed while signing the Service Note if a Staff is trying to sign it before the end time of the Service.

- Service Notes with a scheduled end time that is yet to be passed, will be displayed in Batch Signature screen. This will be the default value of the key as it drives the existing behavior.

B) If the key-value is set to "0",

- Validation message will be displayed while signing the Service Note if a Staff is trying to sign it before the end time of the Service.

- Service Notes with a scheduled end time that is yet to be passed, will not be displayed in Batch Signature screen.

C) If the key - value is set to "Any positive number"

The number specified on the key will determine the number of minutes before the Service End Time from when the signature is allowed. So,

- If a user tries to sign the note within the specified number of minutes before the end time or any time after that, the validation message will not be displayed.

- Service Notes will be displayed in Batch Signature screen once the specified number of minutes prior to the Service End Time is reached.

Note:

1. If this key value is set to "0" or "Any positive number", the value of the existing config key "AllowAuthorToSignServiceANDGroupServiceBeforeStartTime" will not be considered i.e., even if "AllowAuthorToSignServiceANDGroupServiceBeforeStartTime" = "Yes", the signature will not be allowed before start time and instead it will be allowed only after the service end time.

2. 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 "None".

Configuration Key Details

Configuration Keys

Key: SetNumberOfMinsToAllowSignatureBeforeServiceE

SourceTableName:

Module: Group Service Detail, Groups Service, SCM Admin 2/ Services/Notes, SCM Admin 2/Group Service Detail (Core), SCM Admin 2/Services/Notes (Core), SCM Clinical 2/Group Service Note, SCM Clinical 2/Individual Service Note, SCM SmartCare Platform and Framework/Document Framework, SCM SmartCare Platform and Framework/Service Note Framework, Service Note

Screen: Batch Signature (913), Group Service Detail (46), Service Note (29)

Value: 5

Description:

Read Key as: Set Number of Minutes to Allow Signature before Service End Time

This is a new feature being added to the core product by introducing a system configuration key.
Currently, Service Notes can be signed at any point of time even before the Service starts or ends.
The purpose of this key is to determine whether Service Notes can be signed before the actual end time
of the Service or not. This change will be applied to Group Service Details, Service Note, Batch Signature screens.

A) If the key-value is set to "None",
- Validation message will not be displayed while signing the Service Note if a Staff is trying to sign it before the end time of the Service.

- Service Notes with a scheduled end time that is yet to be passed, will be displayed in Batch Signature screen. This will be the default value of the key as it drives the existing behavior.

B) If the key-value is set to "0",
- Validation message will be displayed while signing the Service Note if a Staff is trying to sign it before the end time of the Service.

- Service Notes with a scheduled end time that is yet to be passed, will not be displayed in Batch Signature screen.

C) If the key - value is set to "Any positive number"
The number specified on the key will determine the number of minutes before the Service End Time from when the signature is allowed. So,
- If a user tries to sign the note within the specified number of minutes before the end time or any time after that, the validation message will not be displayed.

- Service Notes will be displayed in Batch Signature screen once the specified number of minutes prior to the Service End Time is reached.

Note: 1. If this key value is set to "0" or "Any positive number", the value of the existing config key "AllowAuthorToSignServiceANDGroupServiceBeforeStartTime" will not be considered i.e., even if "AllowAuthorToSignServiceANDGroupServiceBeforeStartTime" = "Yes", the signature will not be allowed before start time and instead it will be allowed only after the service end time.

2. 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 "None".

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

Author: Navyashree Jois

279: Core Bugs # 128738: Psychiatric Note: 'Same as Last Visit' checkbox issue.

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

Navigation Path 1: Open a 'Client' - Go to the 'Services/Notes' - Click on 'New' - Select the Procedure related to 'Psychiatric Note' – Enter all the required details in the 'Service' tab – Click on the 'Note' tab – Go to 'General' tab – Go to 'Today's Chief Complaint/Reason for visit' section – Check the 'Same as Last Visit' checkbox – Modify the data – Uncheck the 'Same as Last Visit' checkbox.

Navigation Path 2: Go to the 'Medical Decision Making' (MDM) tab – Go to the 'Plan' section – Check the 'Same as Last Visit' checkbox – Modify the data – Uncheck the 'Same as Last Visit' checkbox.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user attempted to sign a 'Psychiatric' Note, the data pulled into the 'Today's Chief Complaint/Reason for visit' field by checking the 'Same as Last visit' checkbox, was same as previous visit details. After modifying the text and unchecking the checkbox, the text in the 'Today's Chief Complaint/Reason for visit' field was removed.

With this release, the issue mentioned above was resolved. Now, the modified 'Today's Chief Complaint/Reason for visit' field data remains as is when the user checks the 'Same as Last visit' checkbox. And, if the user checks the 'Same as Last visit' checkbox again, the below Confirmation message is displayed.

Confirmation message: "You already have Today's Chief Complaint/Reason for Visit information added. Do you want to replace this information with Chief Complaint/Reason for Visit - Last Visit?"

Author: Aishwarya Bommaklar

280. Core Bugs # 128857: Recurring Service: A signed note is getting deleted along with the scheduled services.

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

Navigation Path 1: Client – Go Search – Services/Notes – Services/Notes list page – Click on New icon – Enter all the required details – Click on Save icon – Select Make Recurring option – Enter the details – Select Create Immediately checkbox – Click on OK button.

Navigation Path 2: Client – Go Search – Services/Notes – Services/Notes list page – Select one of the above recurrence service and click on DOS hyperlink – Click on Note tab enter the required details – Click on Save icon – Click on Sign icon.

Navigation Path 3: Client – Go Search – Services/Notes – Services/Notes list page – Select one of the above recurrence service and click on DOS hyperlink – Click on Delete icon – Select 'Delete all the future Services'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user Signed one of the Service Note from the Recurring Service and deleted the whole Recurring Services, the Signed Note also was deleted.

With this Release, the above mentioned issue has been resolved. Now, when the user signs one of the service notes from the recurring service and deletes the whole Recurring Service, the Signed Service Note will not be deleted.

Author: Navyashree Jois

281. Core Bugs # 128888: Recurring Service: A signed note is getting deleted along with the scheduled services.

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

Navigation Path: Open a client – Search for 'Services/Notes' - New - Select any Procedure associated with Psychiatric Note – Enter the required values – Go to Note tab – Enter the required values – Go to Psychotherapy tab Under Note tab – Enter Add-on Codes under Psychotherapy Section– Sign the Service Note.

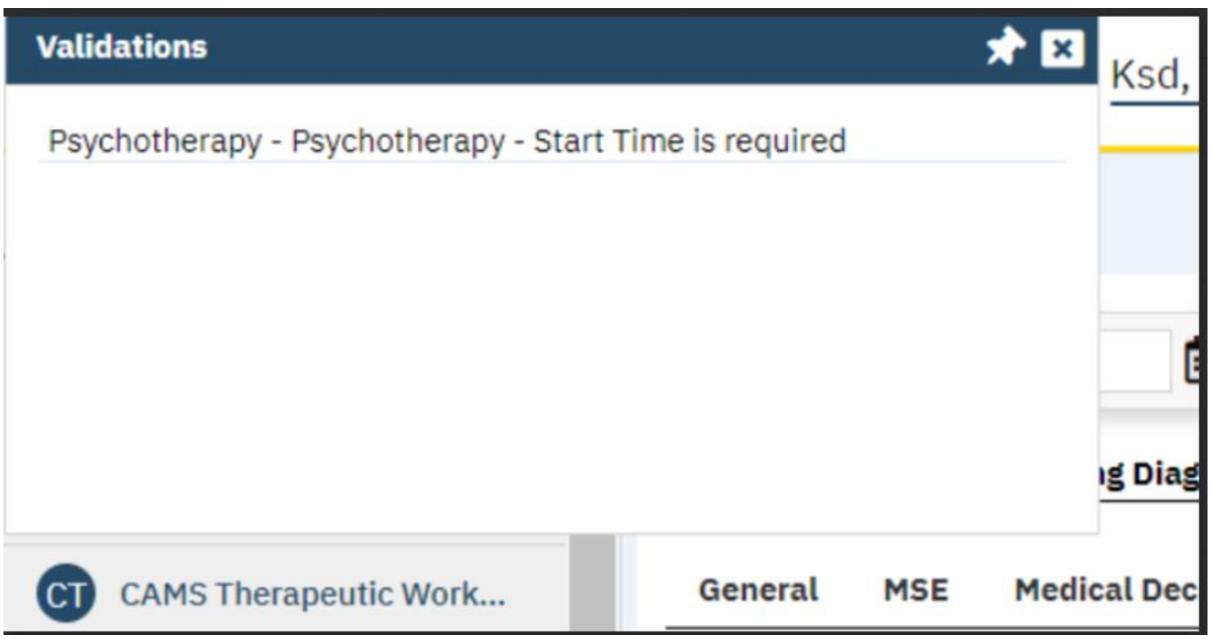
Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The duration added in the Psychotherapy section under the Psychotherapy tab of Note tab was not retained on the 'Add on Codes' tab and also the same was not displayed on the Signed Psychiatric Note PDF.

With this Release, the above-mentioned issue has been resolved. The duration added in the Psychotherapy section under the Psychotherapy tab of Note tab is retained on the 'Add on Codes' tab and also the same is displaying on the Signed Psychiatric Note PDF.

Also, below mentioned validation will be displayed in the validation pop up when the Start Time and Duration fields are not entered for Add-on-code Procedure code in Psychotherapy tab

Validation message: Psychotherapy – psychotherapy – Start Time is required



~~**Author:** Navyashree Jois~~

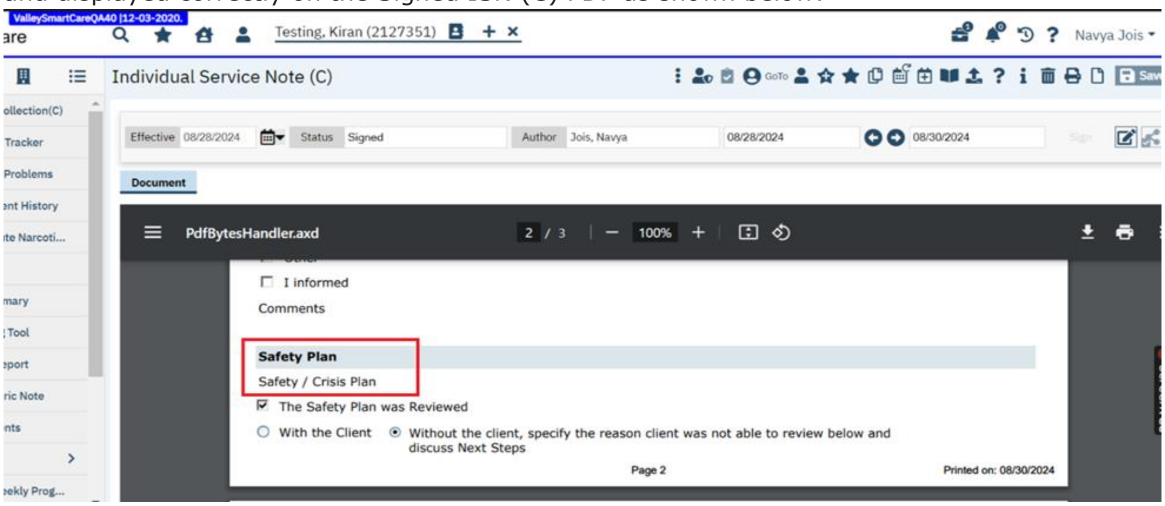
~~282. Core Bugs # 129113: Individual Service Note (C): cutting off Safety Plan in the PDF.~~

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

~~**Navigation Path:** Open a client – Search for 'Services/Notes' - New - Select the procedure associated with 'Individual Service Note (C)'– Enter the required values – Go to Note tab – Enter the required values – Sign the Individual Service Note (C).~~

~~**Functionality 'Before' and 'After' release:**~~
~~Before this release, when the user signed the 'Individual Service Note (C)', the Safety Plan Section data was partially cut off from the PDF document.~~

~~With this release, the above -mentioned issue has been resolved, Now, the Safety Plan section data is aligned and displayed correctly on the Signed ISN (C) PDF as shown below:~~



Author: Kiran Yogendra

283: EII # 126766: To display the Add-On code details on the PDFs generated for all the Service Notes.

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

Prerequisites: Required Add-On codes are added in the 'Add-On Procedure Codes' tab on the 'Procedure Code Details' screen for the 'Procedure' associated with the Service.

Navigation Path: Log in to SmartCare application - Client Search – Select a Client – Select Services/Notes – Click on New - Select a Procedure associated with any Service Note – Enter all the required values in the Service tab – Save – Click on 'Add-On Codes' tab – Select and Add all the required Add-On codes along with other details – Complete the 'Note' tab details – Click on 'Sign' button – Check if the added Add-On codes are displayed on the PDF.

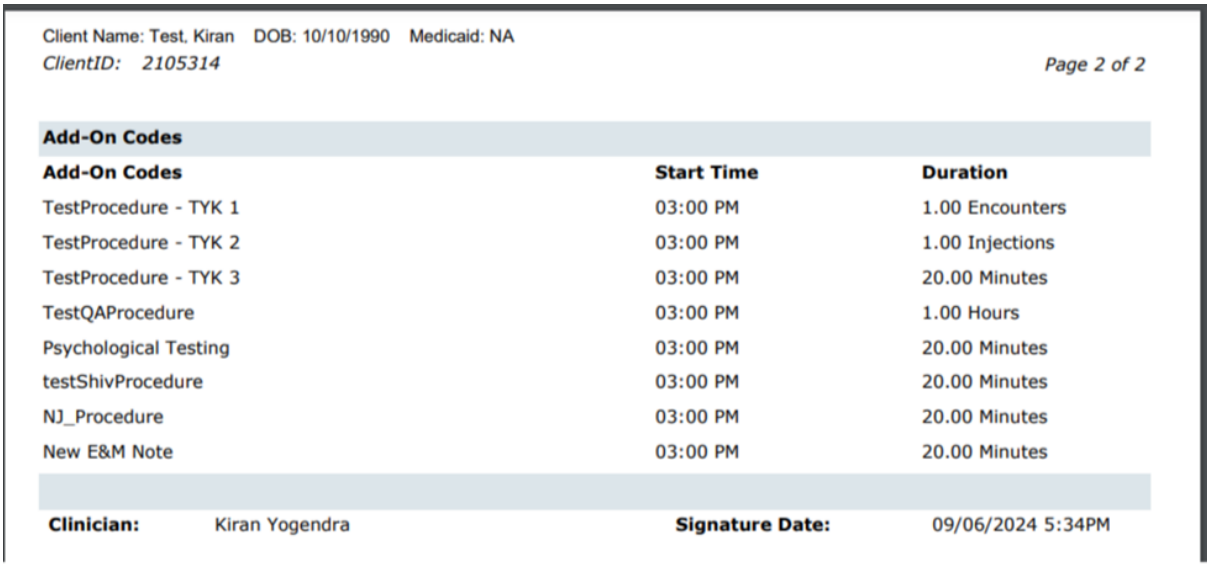
Functionality 'Before' and 'After' release:

Purpose: Currently, PDF does not have Add-On code details displayed even though the same is added in the Add-On Codes tab of the Service.

With this release, core changes are made to add the Add-On codes sub-report to the footer signature of the PDF. With this, when a user adds Add-On Codes on the Service Note's 'Add-On Codes' tab, the resulting signed PDF document will display all the details about the Add-On Services the Client has taken.

In the PDF, Add-On Codes section will be displayed with the below details:
· Add-On Codes

- Start Time
- Duration


Client Name: Test, Kiran DOB: 10/10/1990 Medicaid: NA
ClientID: 2105314 Page 2 of 2

Add-On Codes

Add-On Codes	Start Time	Duration
TestProcedure - TYK 1	03:00 PM	1.00 Encounters
TestProcedure - TYK 2	03:00 PM	1.00 Injections
TestProcedure - TYK 3	03:00 PM	20.00 Minutes
TestQAProcedure	03:00 PM	1.00 Hours
Psychological Testing	03:00 PM	20.00 Minutes
testShivProcedure	03:00 PM	20.00 Minutes
NJ_Procedure	03:00 PM	20.00 Minutes
New E&M Note	03:00 PM	20.00 Minutes

Clinician: Kiran Yogendra **Signature Date:** 09/06/2024 5:34PM

Points to look into:

1. The above change will work for all the Core & Custom Service Notes having the core signature footer ‘RDLCoreSignatureImages’ PDF.

2. This change will not work for any Custom Service Note using any other custom signature footer PDF. To work, the custom footer PDF has to be replaced with the core footer PDF for the required Customers.

Note: After releasing this change, the Customers who already have the custom Add-On codes on their PDFs need to be removed for all the required customers to avoid duplicating the Add-On code data on the PDFs.

Author: Suganya Sivakumar

284: Core Bugs # 129138: Service/Notes : Getting an Error Log entry in the errorlog table.

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

Navigation Path 1: Open a client -- Search for ‘Services/Notes’ -- New -- Select the procedure associated with any of the ‘Service Notes’ -- Enter the required values -- Go to Note tab -- Enter the required values -- Click on Save -- Sign the Service Note.

Navigation Path 2: Navigate to Error log Viewer --- Administration tab --- Error Log Viewer List page --- Search for the appropriate date filters --- In Error Log ID column --- Click on the Hyperlink --- Error Log Detail page.

Functionality ‘Before’ and ‘After’ release:

Before this release, here was the behavior. When a user signed the Service/Note, there was an error log being recorded in the errorlog table.

With this release, the above mentioned issue has been resolved. There is no error log entry being created on signing of a Service note.

Author: **Navyashree Jois**

285. Core Bugs # 129320: Psych Note PDF not displaying correctly after signature.

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

Navigation Path: Open a client - Search for 'Services/Notes' - New - Select the Procedure associated with Psychiatric Note – Enter the required values – Go to Note tab – Enter the required values - Sign the Service Note.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When the user signed a 'Psychiatric Note,' the generated PDF contained only a single page, and all the section data were missing.

With this release, the above-mentioned issue has been resolved. Now, all the section data of the Psychiatric Note is displayed on the signed Note PDF.

~~**Author:** Kiran Yogendra~~

~~286. Core Bugs #129285: Individual Service Note (C): Inactive EBPs are showing on the PDF.~~

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

~~**Prerequisites:** Some of the EBPs included in the 'TRACKSEBPSUTILIZED' Global Code Category must be inactive to check if they are displayed on the signed PDF Note.~~

~~**Navigation Path:** Log in to SmartCare application - Client Search – Select a Client – Select Services/Notes – Click on New - Select a Procedure associated with 'Individual Service Note (C)' – Enter all the required values in the Service tab – Save – Navigate to 'Note' tab – Input all the required details – Click on the Sign button – View the signed PDF.~~

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

~~Before this release, here was the behaviour. When a user tried to sign the 'Individual Service Note (C)', as part of the 'Tracks/EBPs Utilized During the Session' section, the inactive EBP values were also displayed along with the active values on the signed PDF Note.~~

~~With this release, the issue mentioned above is fixed. Now, on the signed 'Individual Service Note (C)' PDF, only the active EBP values will be displayed.~~

Author: Aishwarya Bommaklar

287. Core Bugs # 129262: Description: Error log was created in the service note.

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

Navigation Path 1: Login as Staff 1 – Client – Services/Notes – Click on New icon – Enter the details – Click on Save icon.
Navigation Path 2 : Login as Staff 2 – Select Staff/Users– Select the Staff 1 –Click on Staff name hyperlink – Edit the Staff details – Click on Save icon.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When Staff 1 edited a service note and at the same time if the other staff (Staff 2) logged into their machine and edited the (staff 1) details and saved the staff details, then the error log was created in the Service Note.

Errorlog Message: Collection was modified, enumeration operation might not execute" and "Failed in Method - GetClientPrompts

With this release, the above-mentioned issue has been resolved. Now, when Staff 1 edited a service note and at the same time if the other staff (Staff 2) logged into their machine and edited the (staff 1) details and saved the staff details, then the error log is not created in the Service Note.

Author: Aishwarya Bommaklar

288. Core Bugs # 129139: Error message is logged in the ErrorLog table.

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

Prerequisite: The 'Show Encounter Form' field is selected as 'Yes' in the 'Document Codes Detail' page.
Navigation Path: Client -- 'Services/Notes' -- 'Services/Notes' list page -- Click on New icon -- Enter all the required details -- Click on 'Encounter Form' tab.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. When the user clicked on the 'Encounter Form' tab in the 'Service Note' screen, the below mentioned error message was logged in the ErrorLog table.

Error Message: "Cannot read properties of null (reading 'nodeTypedValue')"

With this release, the above-mentioned issue has been resolved. Now, no error message is logged in the ErrorLog table when the user clicks on the 'Encounter Form' tab in the 'Service Note' screen.

Author: Niroop Hassan

289. EII # 126264 : The changes are added to the Add-on codes tab of the Service Detail, Service note and Group Service details screens.

Release Type: Change | **Priority:** OnFire

Prerequisite: The selected 'Procedure' includes the 'Add-On Procedure Codes'.

Navigation Path 1: 'Client' – 'Services' – 'Services' list page – Click on 'New' icon - 'Service Detail' page – Select required data and click on 'Add-On Codes' tab.

Navigation Path 2: 'Client'– 'Services/Notes' – 'Services/Notes' list page – Click on 'New' icon - 'Service Note' page – Select required data and click on 'Add-On Codes' tab.

Navigation Path 3: 'My Office' – 'Groups'- 'Groups' list page – Click on 'New' icon – 'Group Details' page – Enter required data – Click on 'Save' icon - Click on 'Schedule' tab – Click on 'New Group Service' button – 'Group Service Client Popup – Select required data and click on 'Select' button – 'Group Service Detail' page - Click on 'Add-On Codes' tab.

Functionality 'Before' and 'After' release:

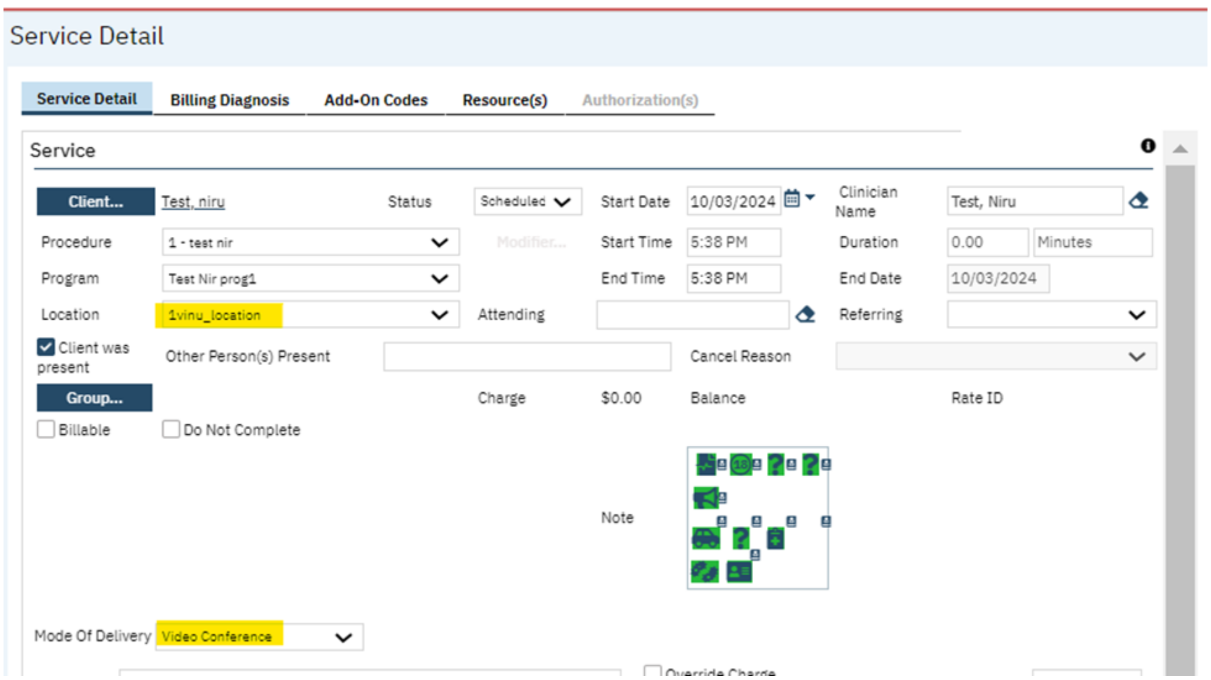
Purpose: To add Location and Mode Of Delivery fields to the Add-On Codes tab of the Service screens.

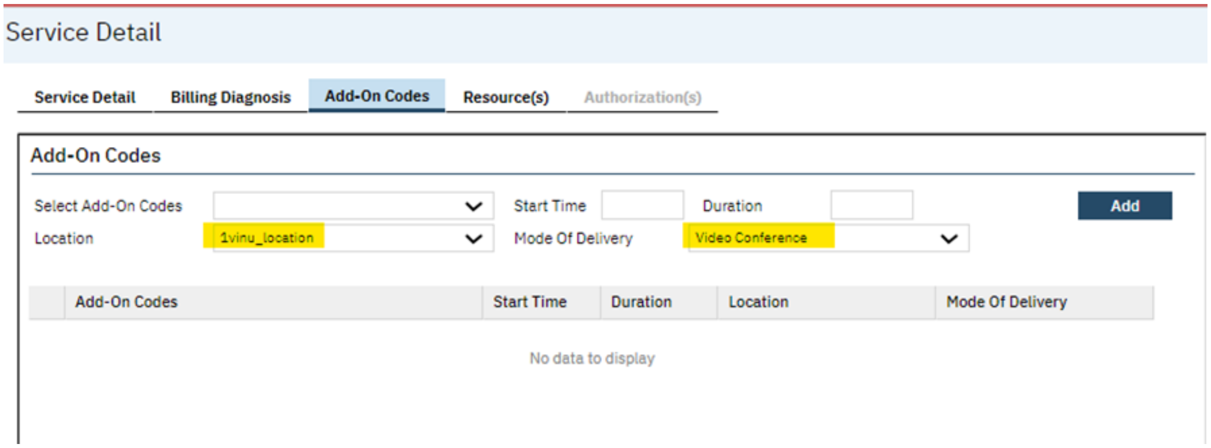
With this Release, the below mentioned dropdown fields are added to the Add-On Codes section in the Add-On Codes tab of the services detail, Service Note and Group services detail screens.

1. 'Location'
2. 'Mode Of Delivery'

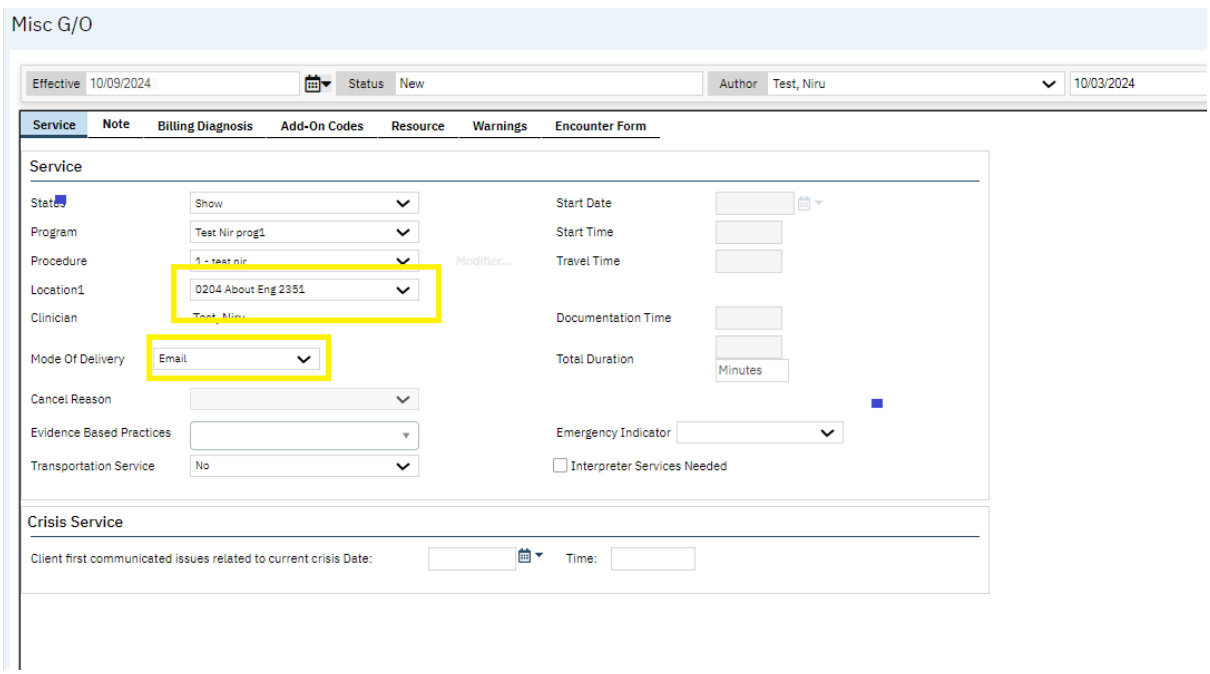
By default, 'Location' and 'Mode Of Delivery' will be initialized from the Service tab when an Add-On code is selected.

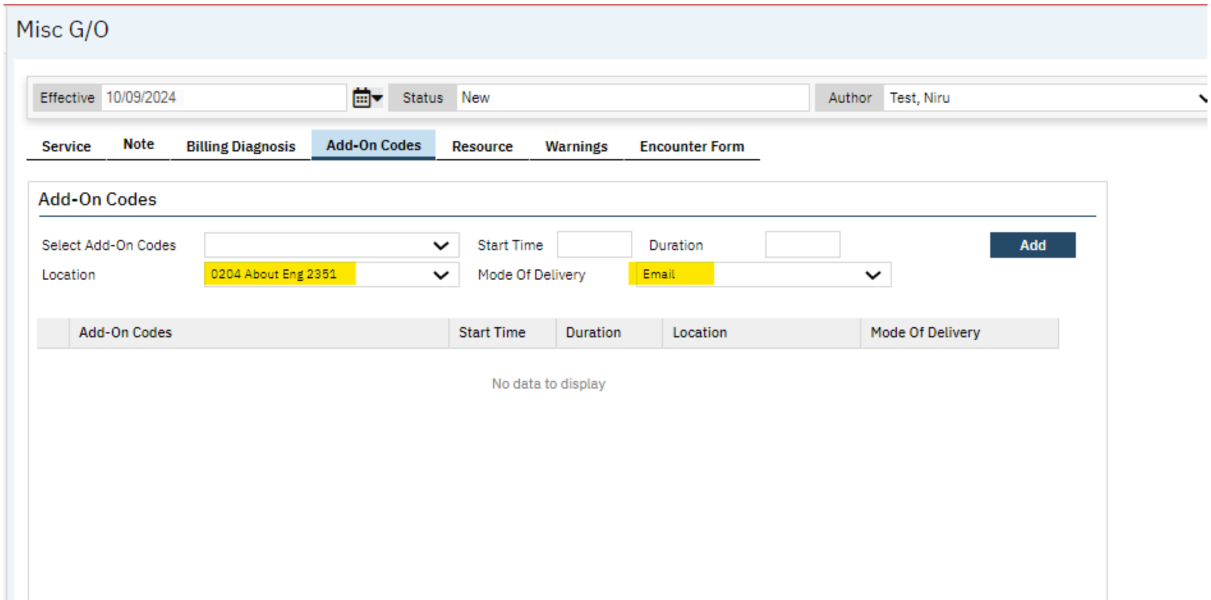
Service Detail :



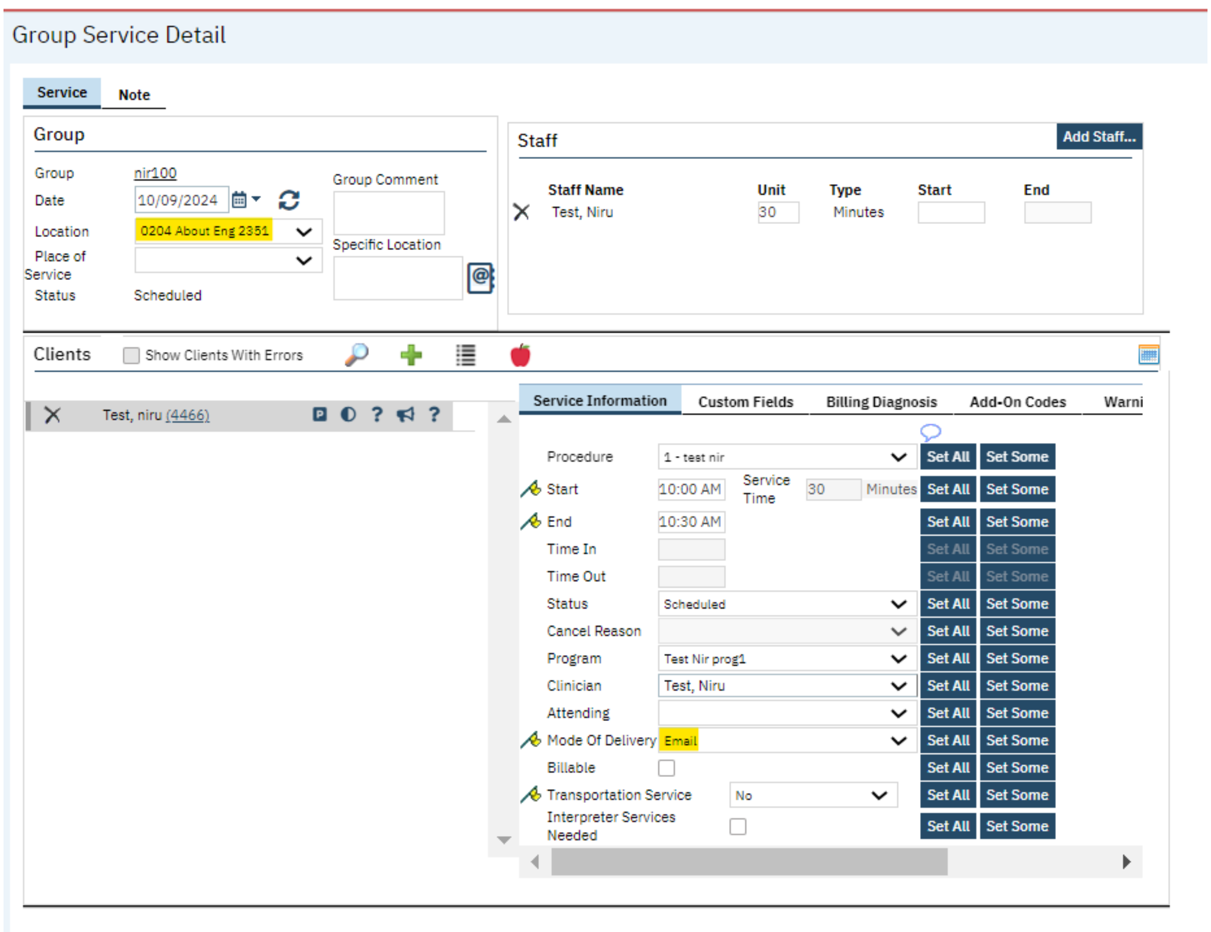


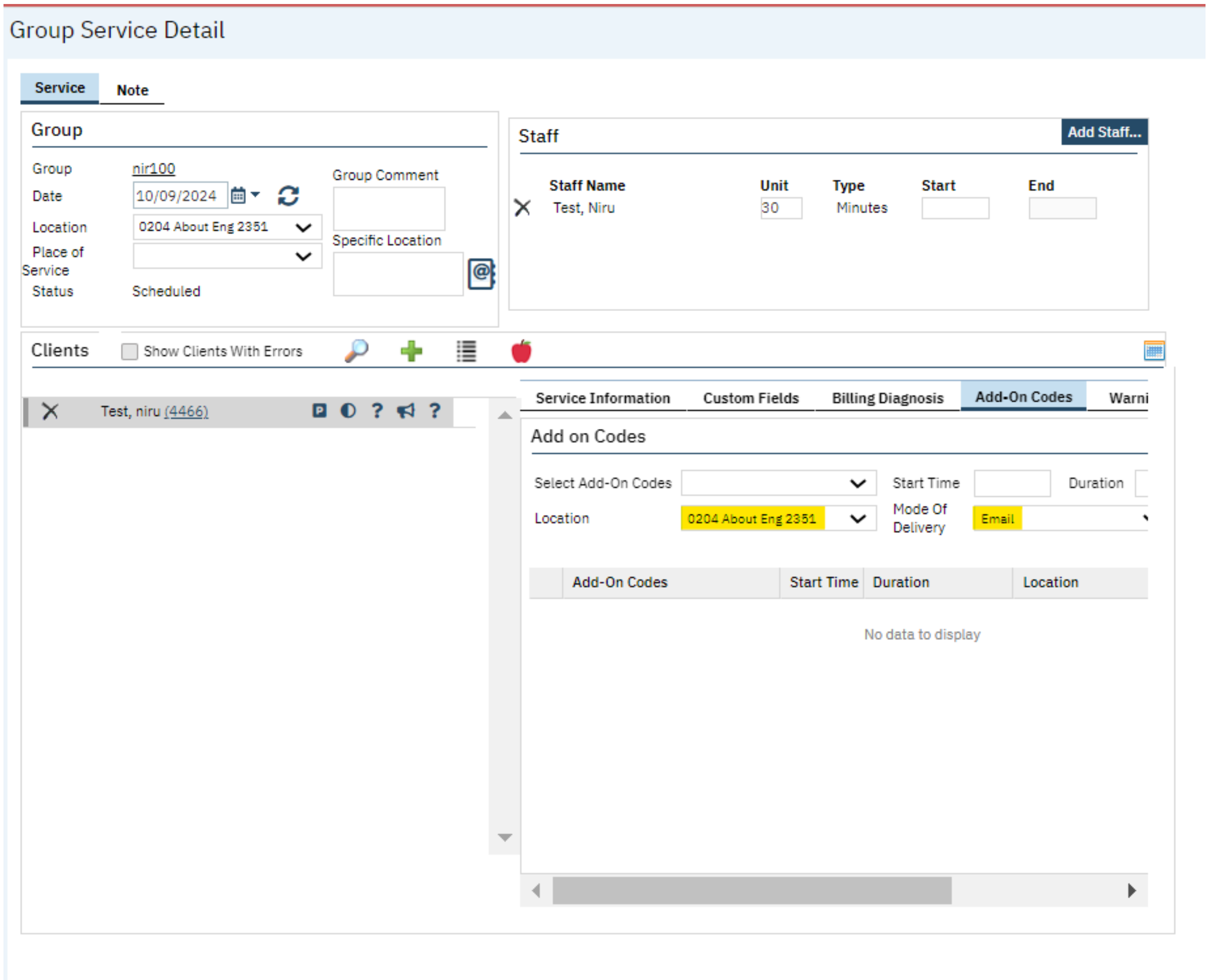
Service Note:





Group service Detail :





Data Model Changes:

The LocationId, ModeOfDelivery columns are added in the "ServiceAddOnCodes" table.

Author: Navyashree Jois

290. EII # 127591: Implementation of "Service Note Reviewer" screen for all the Service Notes.

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

Prerequisites: Multiple Service Notes are signed using different 'Programs' and 'Date of Service' for a Client.

Navigation Path: 'Client' search – Open a client – Search for 'Services Note Reviewer (Client)' - Select the Date – Select the Previous No. of days – Select the Program(s) – Select the Procedure(s) – Select the Status(s) – Click on 'View PDF' Button.

Functionality 'Before' and 'After' release:

Purpose: To implement a new "Service Note Reviewer" screen, based on the filters set, the PDFs will display all the Service Notes in a new window with a descending order of Service Date.

With this release, a new 'Service Note Reviewer(Client)' screen has been implemented.

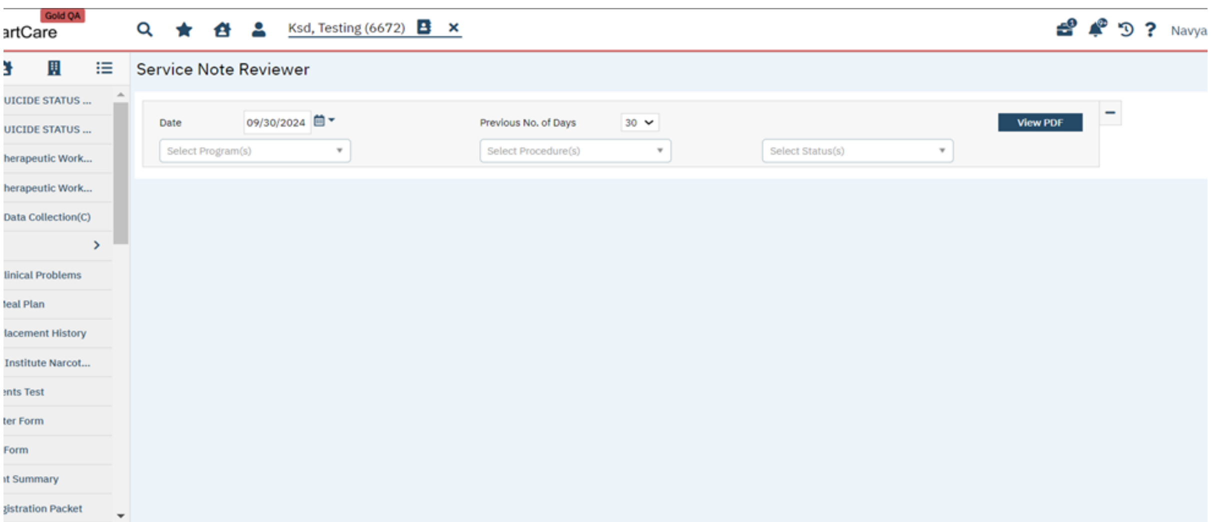
The 'Service Note Reviewer' screen contains the following fields:

1. Date

2. Previous No of Days

3. Multi-select Dropdowns
- Select Program(s)
- Select Procedure(s)
- Select Status(s)

4. View PDF button



1. Date: This is a date control field, that will displayed in the format MM/DD/YYYY.

2. Previous No of Days Dropdown: The user can select the previous No of Days from dropdown. This dropdown displays the values as 7, 14, 30, 60, 90.

This dropdown field will display (Date selected in the above calendar control - the number selected in the 'Previous No of Days' Dropdown) days. Refer to the below **example:**

Example: If the Date selected is 06/18/2024 and the value selected in the Previous No of Days Drop-Down is 30, the PDFs will display for all the signed Service Notes where the Date Of Service is from 05/18/2024 until 06/18/2024.

3. Multi-select Dropdowns:

a. Select Program(s): This is a Multi-select dropdown.
- The system will display the PDFs for the signed Service Notes associated to the Programs selected.
- By default, no selection would be there in this dropdown, which will consider ALL values, including Blank data.

- '<Select All>' is provided as the top selection.
- When <Select All> is selected, it will check all boxes in the multi-select dropdown.
- If user want to search for just 1 or 2 options, they can unselect <Select All>, which will uncheck all boxes. Users may then select the option(s) they want OR user can Apply Filter as-is with no selections and will consider ALL values, including but not limited to Blank data.
- If "Select All" is selected, the system will display the PDFs for the signed Service Notes associated to all the Programs in the Dropdown.

Note: For Customers who use the 'CDAG' Rule, the Filter values differ based on whether the CDAG key is ON or OFF.

When CDAG is OFF: The Multi-select Dropdown for Program will list the Programs to which the client had an open enrollment during the selected date range.

When CDAG is ON: The Multi-select Dropdown for Program will list the Programs to which the client had an open enrollment during the selected date range and those Programs also are mapped to the CDAG selected while the Staff logs in.

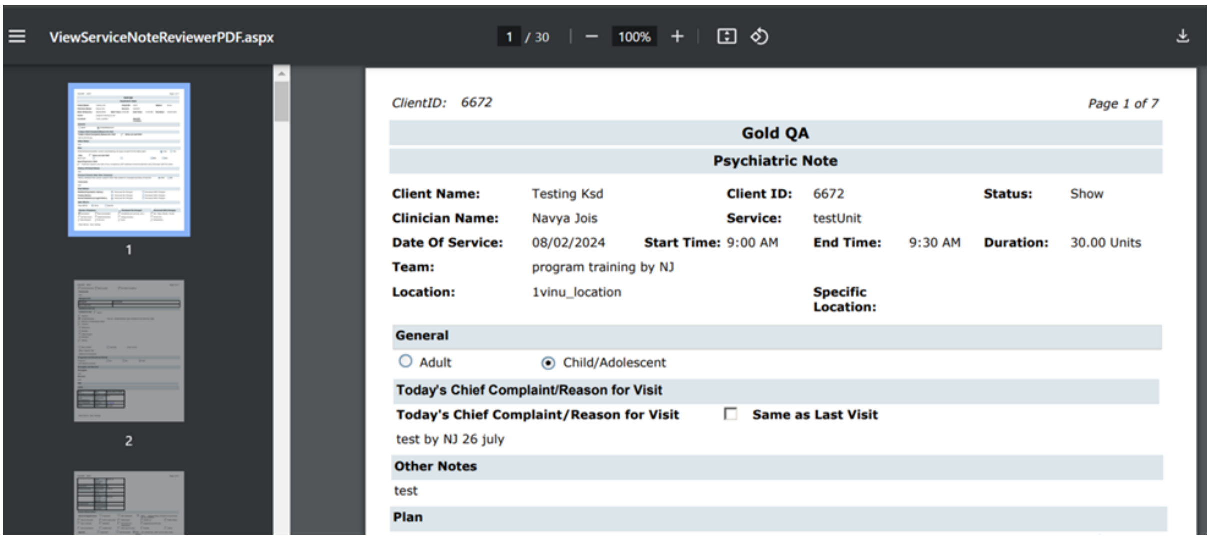
b. **Select Procedure(s):** This is a multi-select dropdown, will display the List of Procedures associated with the above Program list.
   - The output displays the PDFs for the signed Service Notes associated to the Procedures selected.
   - By default, no selection would be there, which will consider ALL values, including Blank data.
   - '<Select All>' is provided as the top selection.
   - When <Select All> is selected, it will check all boxes in the multi-select dropdown.
   - If user want to search for just 1 or 2 options, they can unselect <Select All>, which will uncheck all boxes. The users may then select the option(s) they want OR the user can Apply Filter as-is with no selections and will consider ALL values, including but not limited to Blank data.
   - If "Select All" is selected, the output displays the PDFs for the signed Service Notes, associated to any of the Procedures in the Dropdown.

c. **Select Status(s):** This is a multi-select dropdown, will display the 'Show' and 'Complete' values.
   - The system will display the PDFs for the signed Service Notes for the selected statuses.
   - By default no selection would be there, which will consider ALL values, including Blank data.
   - '<Select All>' is Provided as top selection.
   - When <Select All> is selected, it will check all boxes in the multi-select dropdown.
   - If user want to search for just 1 or 2 options, they can unselect <Select All>, which will uncheck all boxes. Users may then select the option(s) they want OR user can Apply Filter as-is with no selections and will consider ALL values, including but not limited to Blank data.

- If "Select All" is selected, the output displays the PDFs for the signed Service Notes associated to any of the Statuses in the Dropdown.

4. View PDF: This is a button, On clicking the 'View PDF' button, the Service Note PDFs that were generated and based on the filter selected on the 'Service Note Reviewer' screen, the PDF will display all the Service Notes in a new window with a descending order of Service Date. User can scroll through the PDFs by using the scroll bar.

Screenshot for Showing PDFs displaying in a New Window Based on Filters Selected:



SmartCare Improvements

Reference No	Task No	Description
291	Core Bugs # 127780	Generic handler errors in the ErrorLog table.
292	EII # 127992	Notifying Users that they are Accessing SmartCare from Non-Supported Browsers or OS.
293	Core Bugs #129221	Error logged in Errorlog table on updating, deleting Telehealth services
294	Core Bugs #129054	Input String not in correct format red errors
295	EII #127444	The configuration key ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs functionality is used to hide or show SNOMED code and descriptions in UI and PDF in the documents and screens.

Author: Rakesh Naganagoda

291. Core Bugs # 127780: Generic handler errors in the ErrorLog table.

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

Navigation Path: Login to 'SmartCare' application – Go Search - ErrorLogViewer (Administration) – 'ErrorLogViewer' Screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The users were observing many errors as below in the ErrorLog table.

Error Message: "The file '/GoldSmartcareQA/GenericHandlers/ErrorPage.aspx' does not exist"

With this release, the above-mentioned issue has been resolved. Now, the users are not getting the above mentioned errors in the ErrorLog table.

Author: Rakesh Naganagoda

292: EII # 127992: Service Notes/ Group Services: Add a validation for Service Notes if a Staff is trying to sign the note at any time before the end time of the scheduled Service.

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

Navigation Path: Login to SmartCare application with different browsers.

Functionality 'Before' and 'After' release:

Purpose: To notify a user that he is using a non-supported browser or OS so that they can login using a Supported Browser and OS.

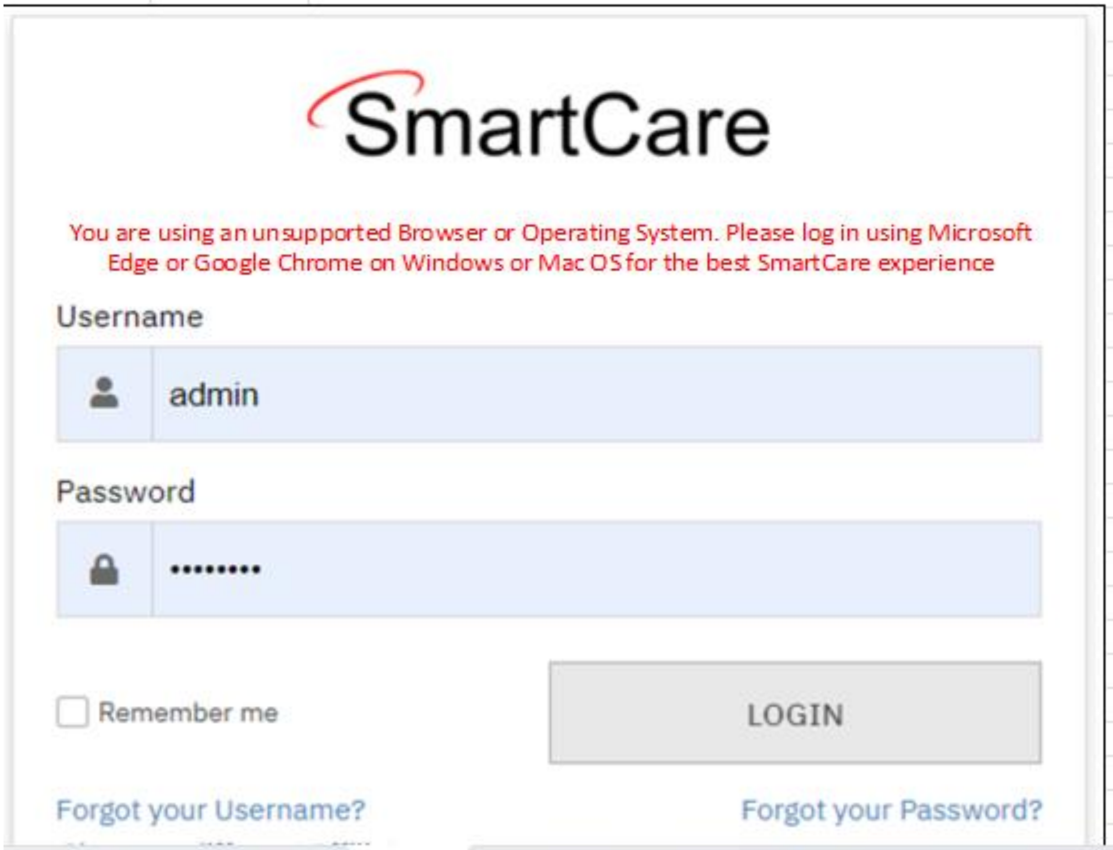
Message: "You are using an unsupported Browser or Operating System. Please log in using Microsoft Edge or Google Chrome on Windows or Mac OS for the best SmartCare experience" to be displayed to the user on the login screen. This is not a hard stop validation. User can still continue to log in and proceed.

This functionality is implemented for the SmartCare login page and Patient Portal login page.

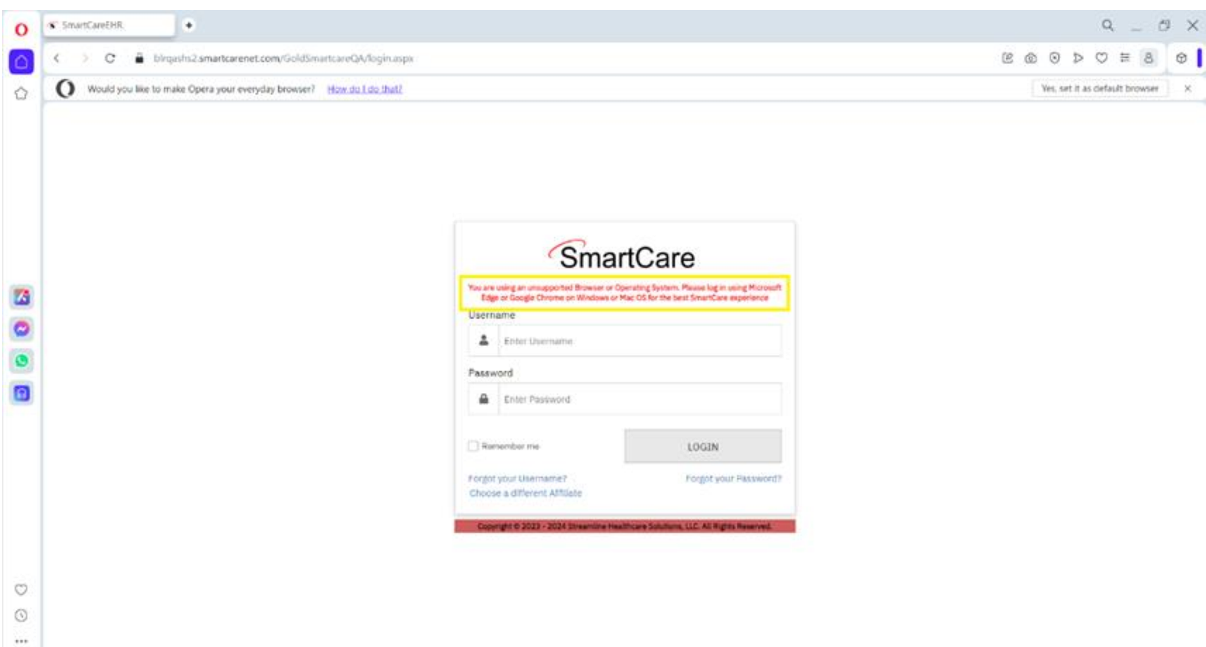
The details like Browser and OS used for accessing the SmartCare application will be logged into the Table "StaffLoginHistory". These details to be logged in irrespective of whether the Browser/OS used is supported or non-supported.

Note: Following are the browsers supported by Streamline
Google Chrome - Latest Version and the prior version.
Microsoft Edge - Latest Version and the prior version.

Screenshot of the Message displaying in the Login Page using Firefox browser:



Screenshot of the Message displaying in the Login Page using Opera browser:



DataModel Changes: In table StaffLoginHistory table new column UserEnvironment is added.

Author: Manjunath Maliptail

293. Core Bugs #129221: Error logged in Errorlog table on updating, deleting Telehealth services.

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

Prerequisite: A telehealth service is scheduled from the Services/Notes screen.

Navigation Path 1: Login to SmartCare Application – Select a client – Services/Notes (Client) – In Service/Notes list screen --- Select the Telehealth service – In Service Note details screen, update the date of service and time -- Click on save button.

Navigation Path 2: Login to SmartCare Application – Select a client – Services (Client) – In services List screen click on New Button – In Service details screen – enter all the required fields – click on save button – Click on telehealth Icon – In Telehealth Set up pop up – click on delete meeting button before telehealth meeting is created.

Navigation Path 3: Login to SmartCare Application --- My services (My Office) --- In My Services Screen – under Telehealth column, click on update Button – Telehealth Set up pop up – update the telehealth meeting details – click on save button.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. The Error logs were logged into the Errorlog table in the following Scenarios.

- When the user tried to update the Date Of Service of a Telehealth service in the Services/Notes screen.
- Clicking on the Delete Meeting button even before the Telehealth meeting are saved.
- Updating the Telehealth Meeting details from the My Services Screen.

With this release, the above-mentioned issue has been resolved. Now, in the above scenarios the error logs are not logged in the Errorlog table.

Auhtor: Manjunath Mallipatil

294. Core Bugs: 129054: Input String not in correct format red errors.

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

Prerequisite: A service is scheduled for a client through the below **Path:**

Login to SmartCare Application – Select a client –Services(Client)—In Services List screen, click on new button – in Service details screen, enter all the required field – Click on save Button.

Navigation Path: Login to SmartCare Application – navigate to Reception Screen – Click on Scheduled Hyperlink -- Change Status Pop Up – Select cancel from the drop down and select the cancel reason – Click on change button.

Functionality 'Before' and 'After' release:

Before the release, here was the behavior. When a user changed the status of the service in the Reception screen from the change status pop up, the following error log was logged in the Errorlog table.

Error: "Input String not incorrect format"

With this release, the above-mentioned issue is resolved. Now, when a user changes the status of the service to cancel in the reception screen, no Error is logged in the Errorlog table.

Author: Akshay Vishwanath

295. EII # 127444: The configuration key ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs functionality is used to hide or show SNOMED code and descriptions in UI and PDF in the documents and screens.

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

Prerequisite: Set ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs configuration key to 'Yes' or 'No'.

Navigation Path 1: 'Client'- 'Document'**-** Navigate to the document below- Family History document ,Medical Progress Note document ,National Outcome Measures (NOMs) document and NOMS (Core)document.

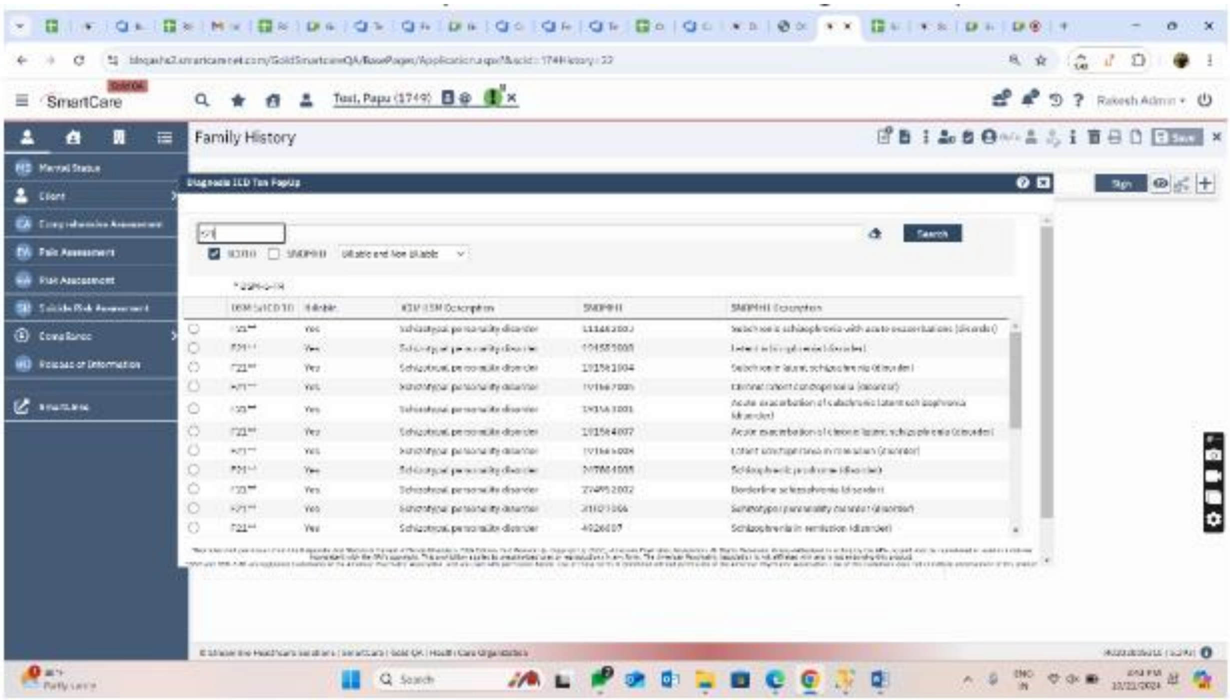
Navigation Path 2: 'Client'-'Allergies', 'Client Allergies' screen.

Functionality 'Before' and 'After' release:

With this release, The existing configuration key ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs functionality is used to hide or show SNOMED code and descriptions in UI and PDF in the following documents and screens.

- Family History document
- Medical Progress Note document
- National Outcome Measures (NOMs)
- NOMS (Core)document
- Allergies
- Client Allergies screens

A) If the key value is set to "Yes", then SNOMED codes and their descriptions are shown in all screens where Diagnosis codes can be searched for, all screens where SNOMED codes and descriptions are displayed, and in document PDFs. This will be the default value of the key as it drives the existing behavior.

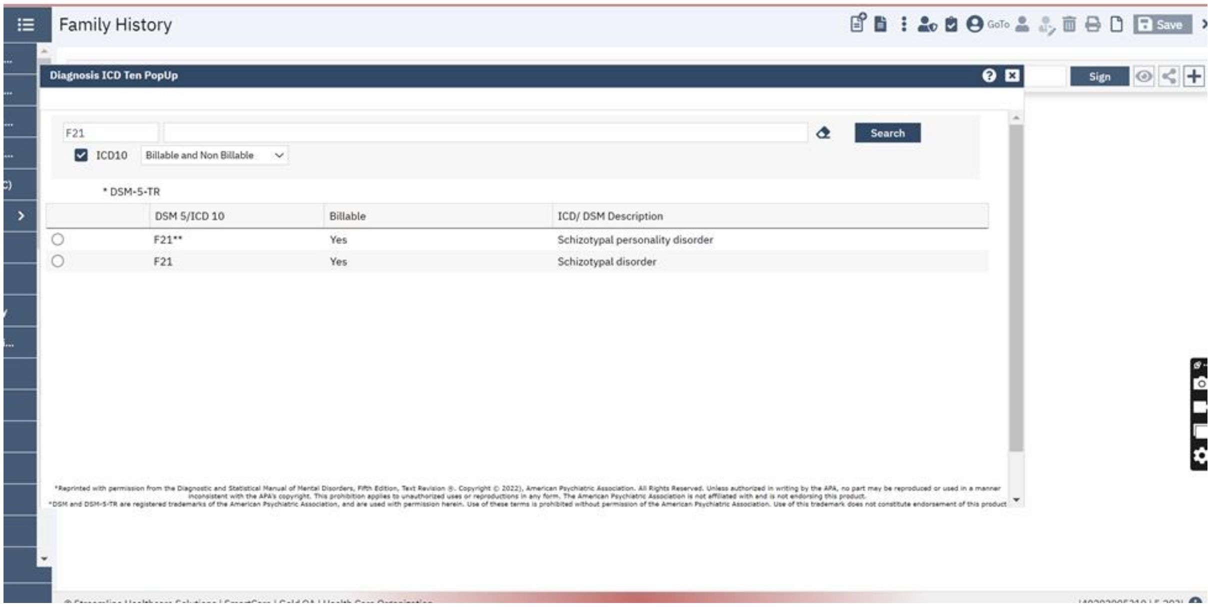


B) If the key value is set to “No”, SNOMED codes and their descriptions are not shown in all screens where Diagnosis codes can be searched for. Also, SNOMED codes are not shown on all screens where SNOMED codes and descriptions are displayed, and in document PDFs.

Note:

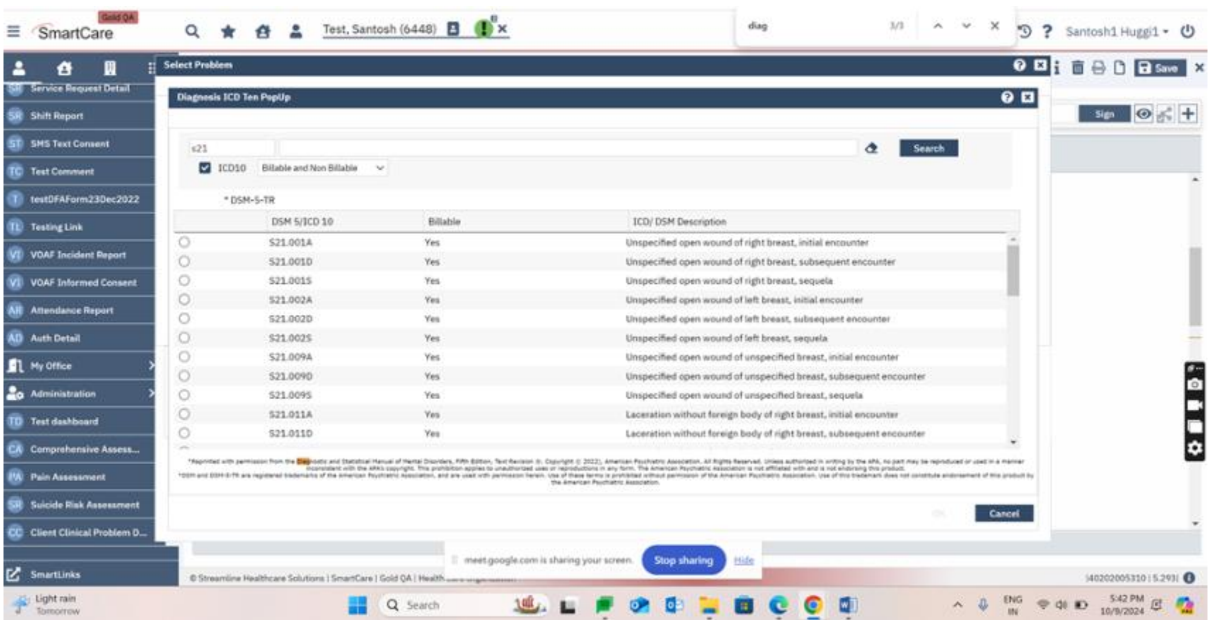
1) If by chance the value of the key is updated with any value apart from the allowed values, the system will consider the default behavior, i.e. same as the key value is "Yes".

Family History Document: The SNOMED code and their descriptions are hidden when the configuration key is set to 'No'.

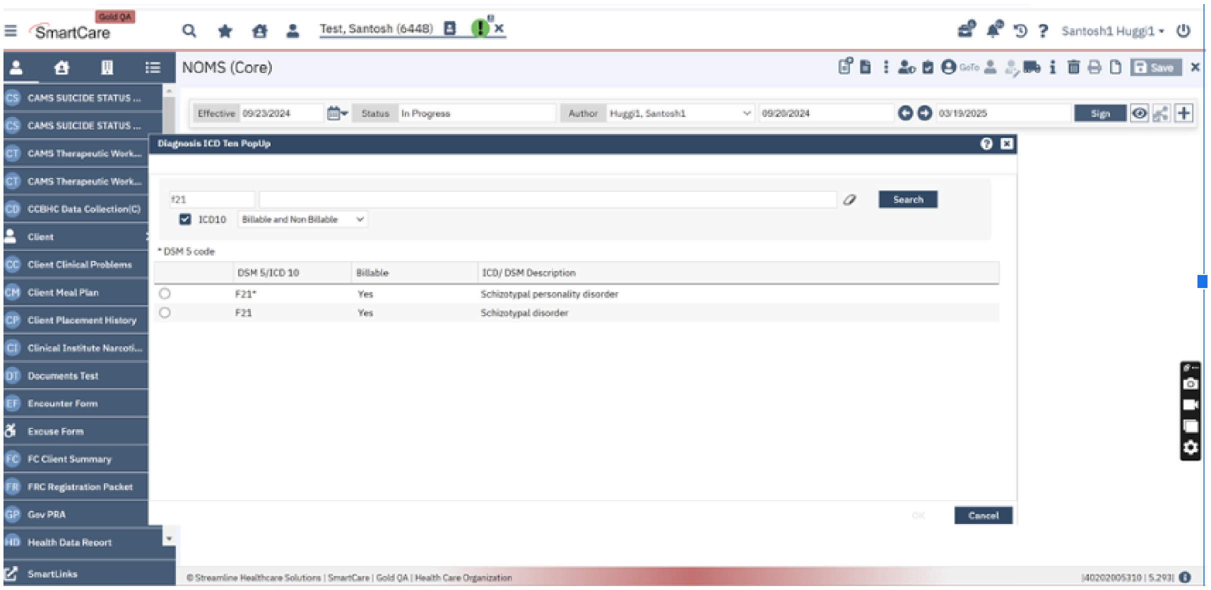


When ShowSNOMEDCodeAndDescriptionOnScreensAndPDFs configuration key is set to 'No', on searching for an ICD10 code that has multiple DSM and Non-DSM codes available, then the search result will display top most record - one for DSM and another for Non-DSM.

Medical Progress Note: The SNOMED code and their descriptions are hidden when the configuration key is set to 'No'.

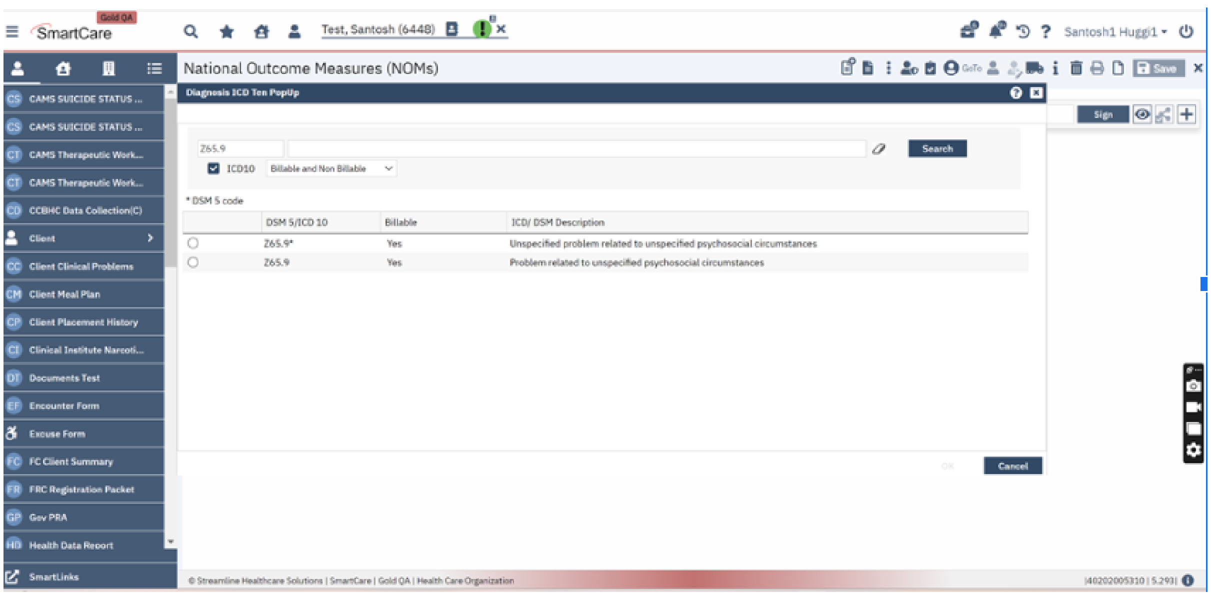


NOMS(Core) : The SNOMED code and their descriptions are hidden when the configuration key is set to 'No'.

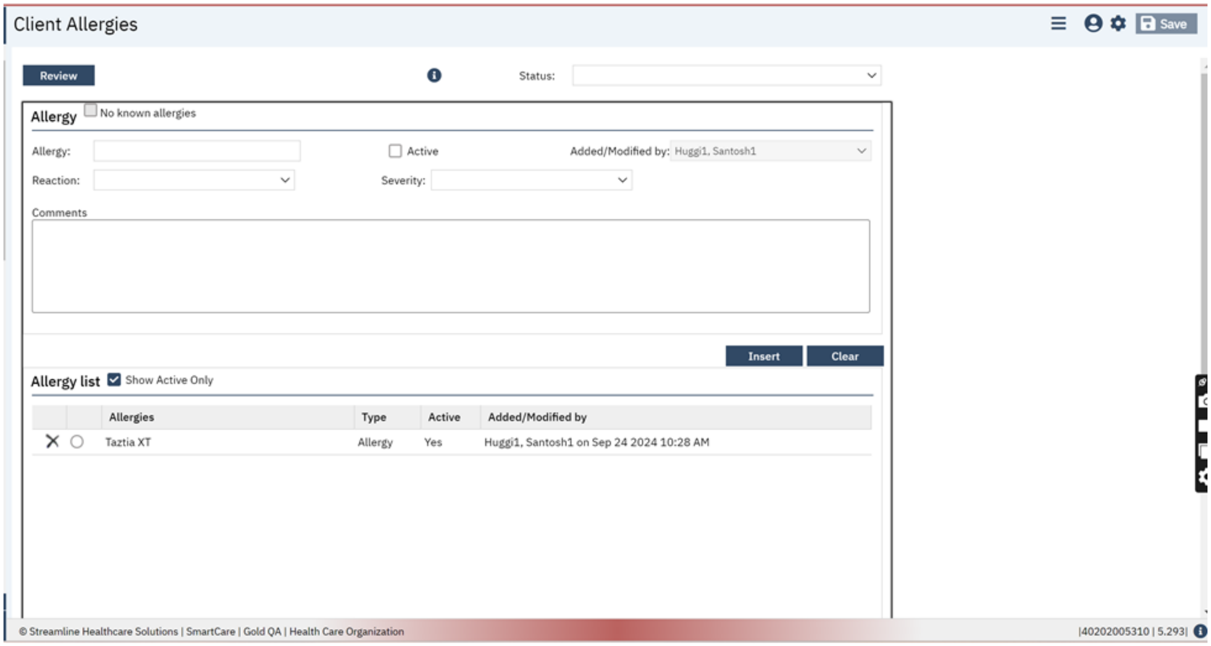


National Outcome Measures (NOMs):

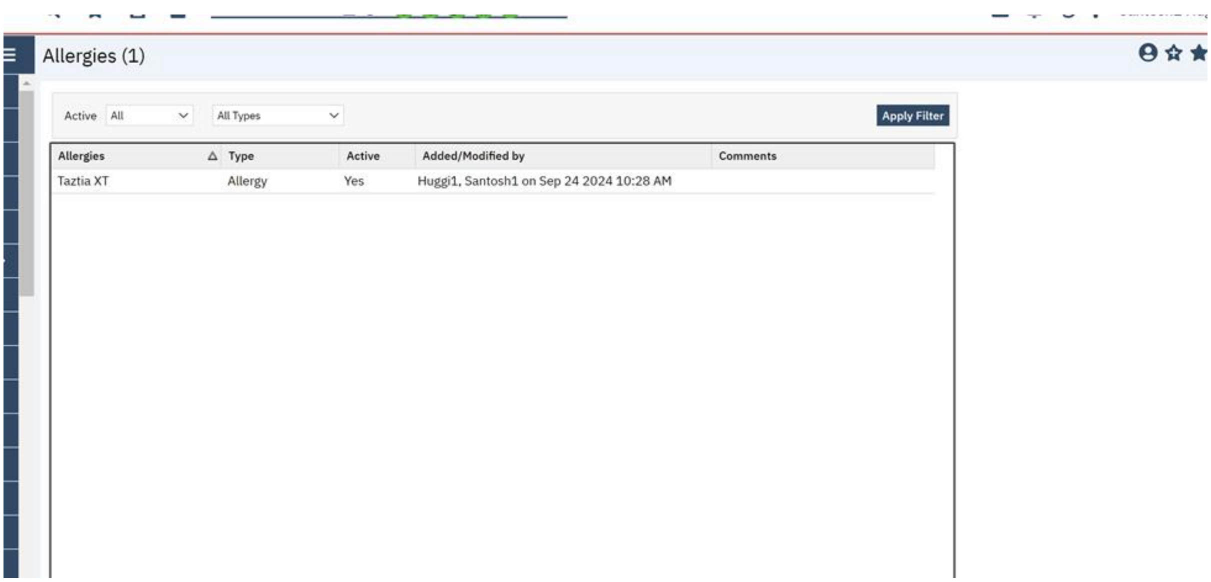
The SNOMED code and their descriptions are hidden when the configuration key is set to 'No'.



Client Allergies: The SNOMED code and their descriptions are hidden when the configuration key is set to 'No'.



Allergies: The SNOMED code hidden in 'Allergies' screen when configuration key is set to 'No'



Spell Checker

Reference No	Task No	Description
296	Core Bugs # 128915	Issues in 'Spell Check' pop-up

Author: Sunil Belagali

296. Core Bugs # 128915: Issues in 'Spell Check' pop-up

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

Navigation Path: Login to SmartCare application – Select the 'Client'– Navigate to any Documents or Services/Notes that has a Text area field - Write down something wrong to correct with the spell checker - Use the spell checker tool – Observe that in 'Spell check' the suggestions are appearing.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In any Documents or Services/Notes that had a Text area where the user tried to use the spell check to correct the word, the suggestions were not appearing in the 'Spell Check' pop-up.

With this release, the above-mentioned issue has been resolved. Now in any Documents or Services/Notes that has a Text area where the user tries to use the spell check to correct the word, the suggestions are appearing in the 'Spell Check' pop-up and also users are able to select any of the suggestions.

Staff/Users

Reference No	Task No	Description
297	Core Bugs # 128792	'Staff Details': Duplicate Permission items are displayed for the screens in the 'Permission' section of 'Permission Items' list.
298	Core Bugs #129161	[Clinical] [System] New Productivity Report is not working.

Author: Namratha Nagaraj

297. Core Bugs # 128792: 'Staff Details': Duplicate Permission items are displayed for the screens in the 'Permission' section of 'Permission Items' list.

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

Navigation Path: 'Administration' – 'Staff/Users' list page – 'Staff Details' – 'Roles/ Permissions' tab – 'Permission' section – Select the Permission Type as 'Screens' –Enter as 'Patient Account' in the 'Permission Item' field – Click the 'Apply Filter' button.

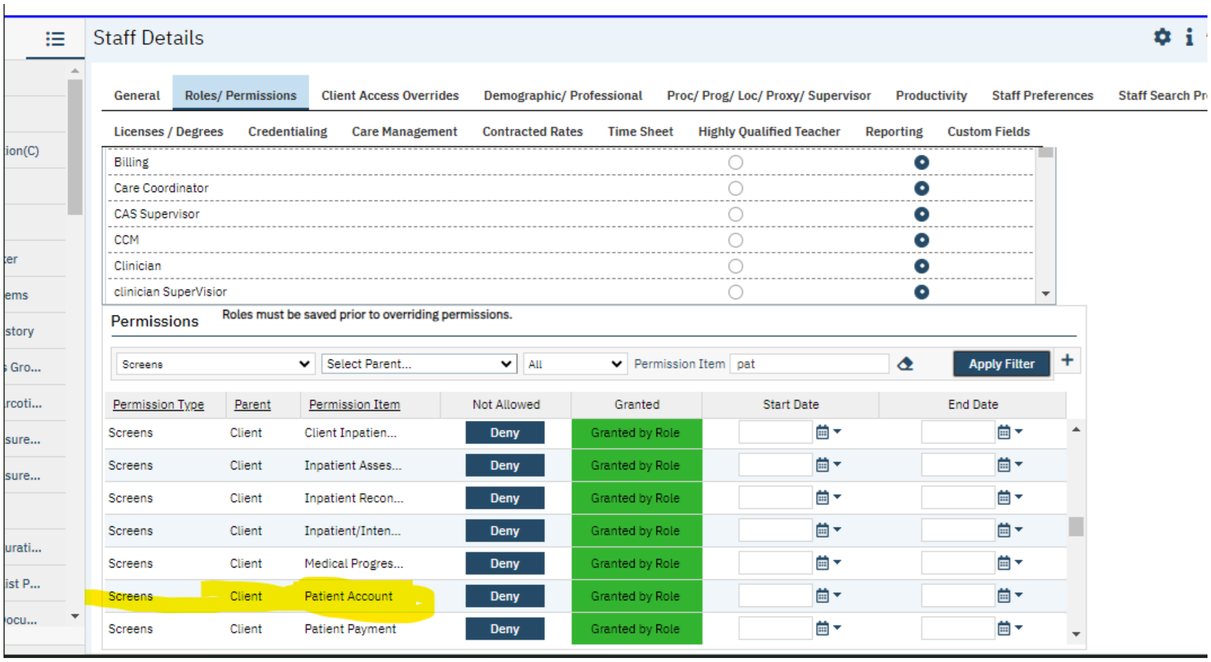
Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The duplicate permission items were displayed for 'Patient Account' in the 'Permission Items' list of 'Permission' section under 'Staff Details' screen.

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

1. Removed all the Inactive duplicate permission items from the screens 'Permission List' under 'Staff Details' screen.

2. The 'Client Account' is renamed as 'Patient Account' in the Permission item of Screens.



Author: Chaitali Patil

298. Core Bugs # 129161: [Clinical] [System] New Productivity Report is not working.

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

Prerequisite: To display the data in the report, need to Create the below data:

- Supervision Hierarchy -- Team Productivity -- Productivity Target/offset - Staff Target (Use same program in all places), then create the Service and complete the service with the past date.
- After this set up, Execute this Job SP in DB - ssp_SCCalculateOpenPeriodProductivityMetrics

Navigation Path: Go search – 'Productivity Details Report' (My Office) – select the required fields and click on 'View Report'.

Functionality Before and & After Release:

Before this release, here was the behavior. When the user tried to open the Report, the report was not loading and getting the below error message:

Error message: "The report is no longer available. Please contact Technical Support."

And also, as per the filter selection, the correct 'Team' information was not displayed in the reports.

With this release, the above-mentioned issue has been resolved. Now, the Report is loading fine and as per the filter selection, the correct 'Team' information is displaying in the reports.

Teds Tracking List

Reference No	Task No	Description
299	EII # 127523	To add Core TEDS logic to generate TEDS episodes-based program enrollment.
300	Core Bugs # 128677	The 'TEDS Tracking List' Page is showing deleted records.
301	Core Bugs #129154	A new TEDS episode was created, and the previous TEDS episode and program were discharged during bed transfer.

Author: Dinesh Ponnuswamy

299. EII # 127523: To add Core TEDS logic to generate TEDS episodes-based program enrollment.

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

Prerequisites:
1. Map the programs with the episode type in the TEDS setup list.

2. The config key 'SetTedsServiceType' is set to 'Program', if the users are creating the TEDS episode through the following screens:

• Client Program Enrollment

• Bed Enrollment

• Bed Transfer

• Disposition

• Registration Document

3. The config key 'SetTedsServiceType' is set to 'Procedure', If users are creating the TEDS episode through the 'ServiceNote (Client)' or 'Services' screen.

Navigation Path 1: Login to SmartCare –Create a New 'Client' Through Client Search – Client Inquiry – Inquiry Details Enter all the details – Link/Create Client button –Click on Register – Client Registration Document – Enter the details – Enroll the Program – Sign – Navigate to TEDS Tracking List.

Navigation Path 2: Login to SmartCare – Client – Programs (Client) – Enter all the details – Enroll the Programs – Save – Navigate to TEDS Tracking List.

Navigation Path 3: Login to SmartCare – Create a New 'Client' through Client Search – Client Inquiry – Disposition Section – Enter all the Details – Enroll the Program – Save – Navigate to TEDS Tracking List Page.

Navigation Path 4: Login to SmartCare – Client – Bed board (My Office) – Admit the Client – Navigate to TEDS Tracking List Page.

Navigation Path 5: Login to SmartCare – Client – Bed board (My Office) – Bed Transfer – Navigate to TEDS Tracking List Page.

Navigation Path 6: Login to SmartCare – Client – Service Note (client) – Select the Programs– Enter the details – Sign – Navigate to TEDS Tracking List Page.

Navigation Path 7: Login to SmartCare – Client – Services (client) Select the Programs– Enter the details – Sign – Navigate to TEDS Tracking List Page.

Functionality 'Before' and 'After' release:

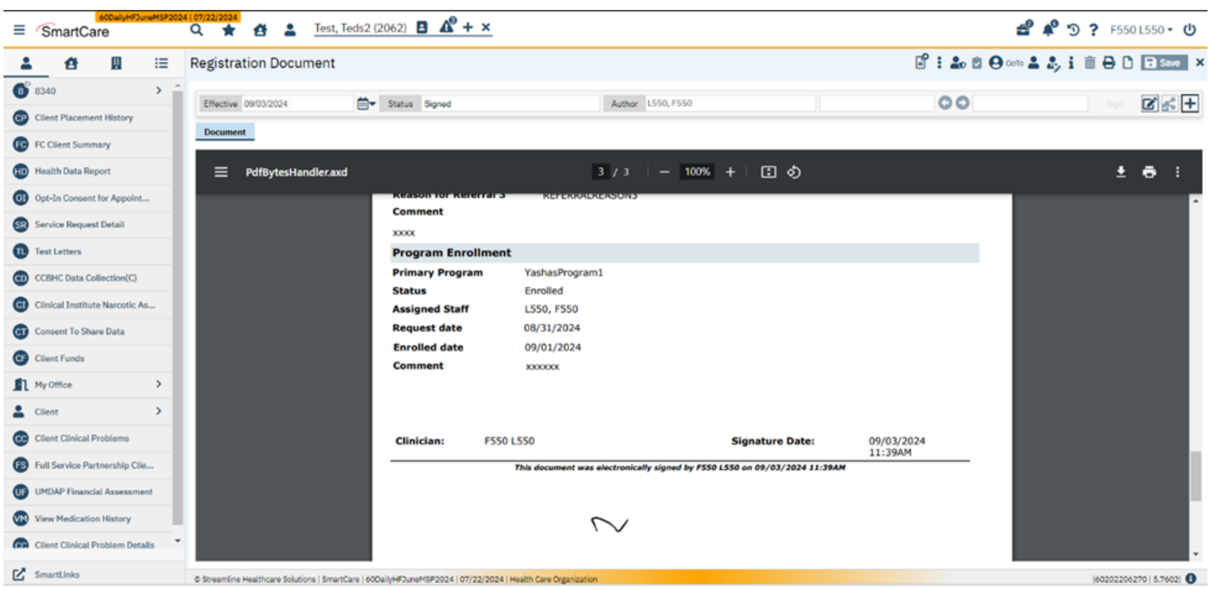
Purpose: To build a way for the system to create the TEDS Episode information consistently for all the customers.

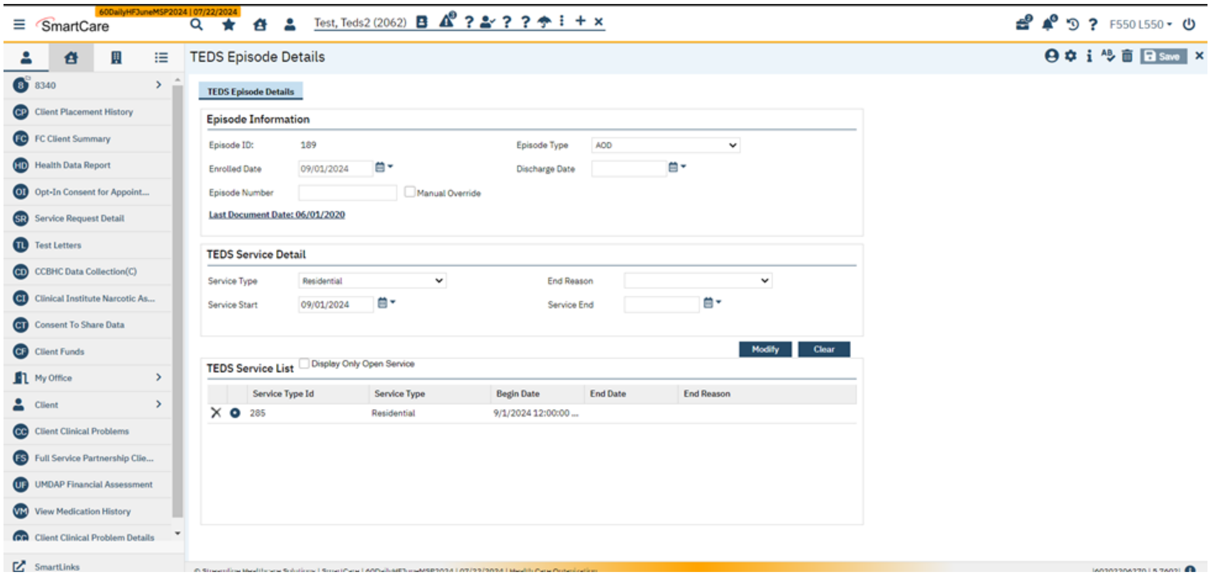
With this release, the following screens will create a TEDS episode for the client:

- Registration Document
- Programs (Client)
- Disposition
- Bed Board (My Office)
- Bed Transfer
- Service Note/Services

Registration Document:

On Signing a registration document with a new program enrollment, that did not previously exist for the client, the program enrollment is created, and a TEDS episode will be generated for the client.

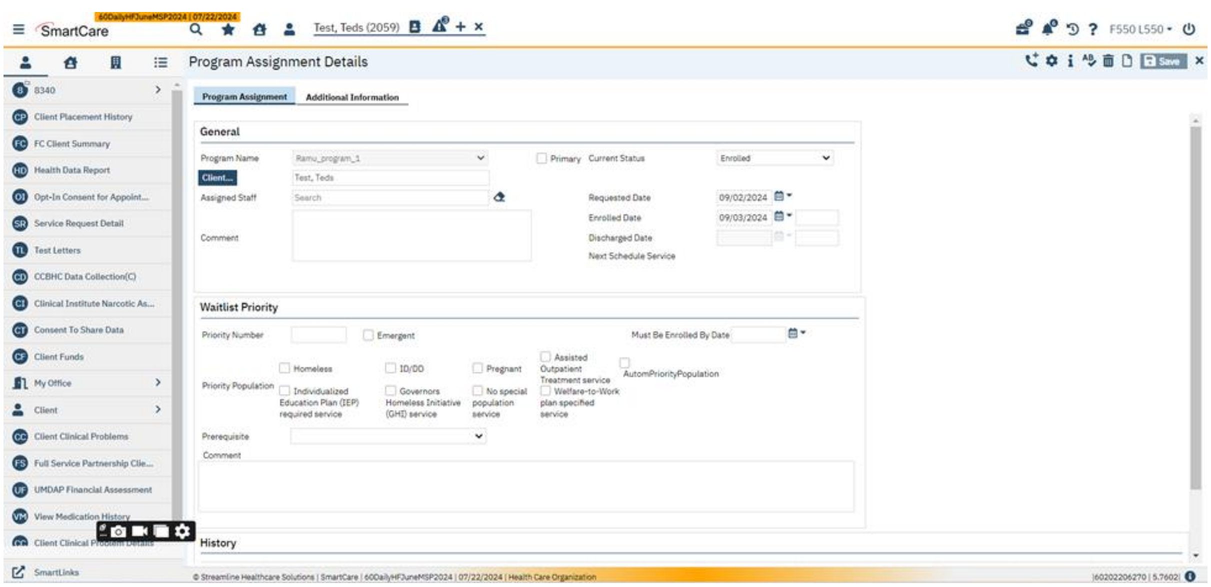


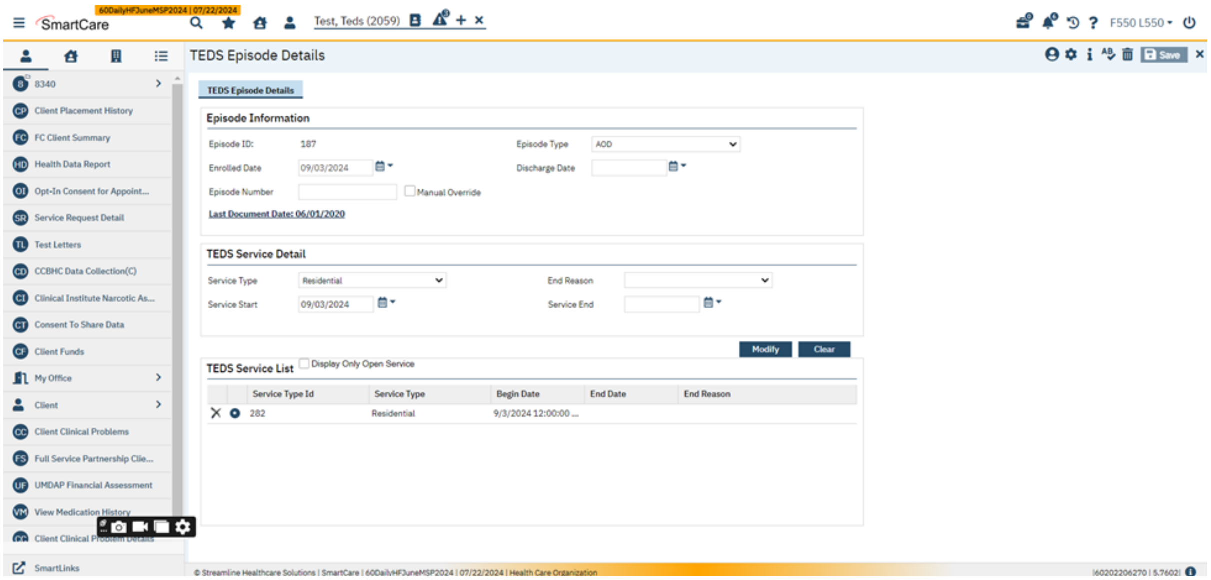


Programs (Client):
When users enroll a client in a program via the Client Program Details screen, the system creates a TEDS episode for the client.

If the client already has a TEDS episode, enrolling in the program will not create a new TEDS episode because the episode type already exists.

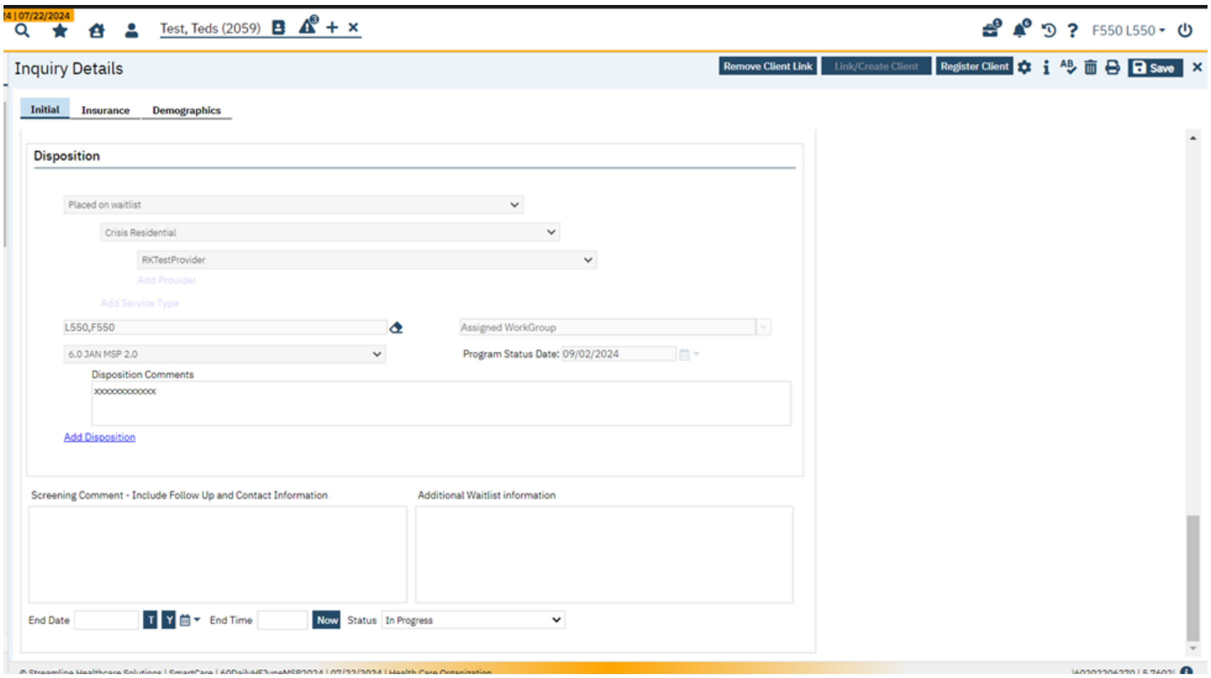
When users discharge a program via the Client Program Details screen by setting the status to 'Discharge,' the system does not discharge the TEDS episode if the client has one or more active programs. the system will review the TEDS Episode Mapping and if ALL programs are Discharged for the currently open TEDS Episode, the TEDS Episode will have an End Date set as the last Program Discharge Date.

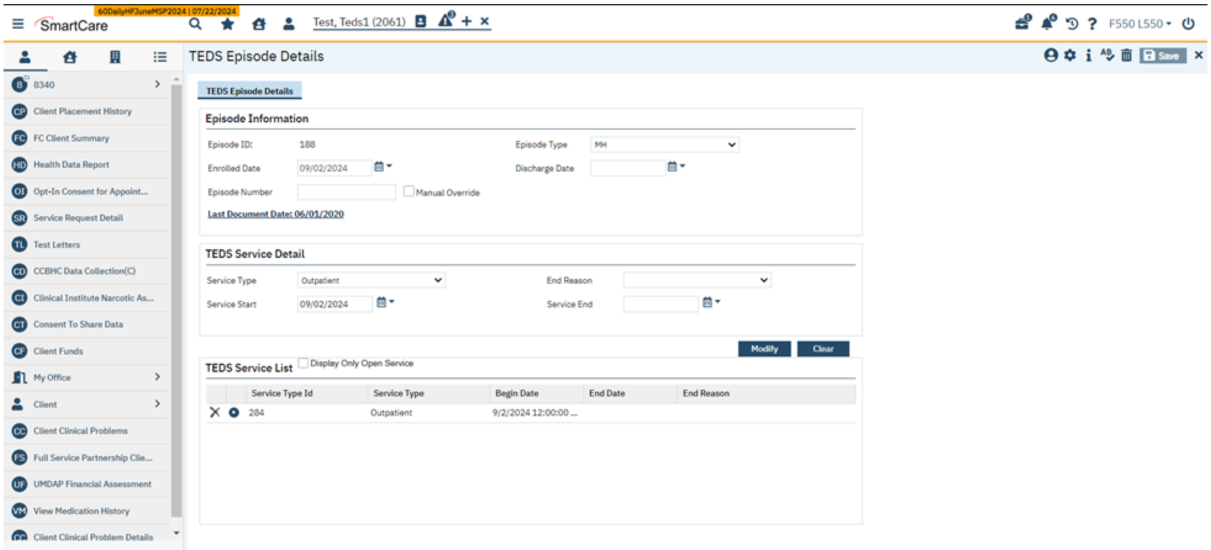




Disposition:

When the System Configuration key 'TurnOnCareCoordinationWorkflow' is set to 'Yes,' and the recode category 'AutoEnrollClientinProgramonDisposition' is mapped with the Program ID. When the users enroll a client in a program through the Client Inquiry – Disposition section, the system will create a TEDS episode for the client.

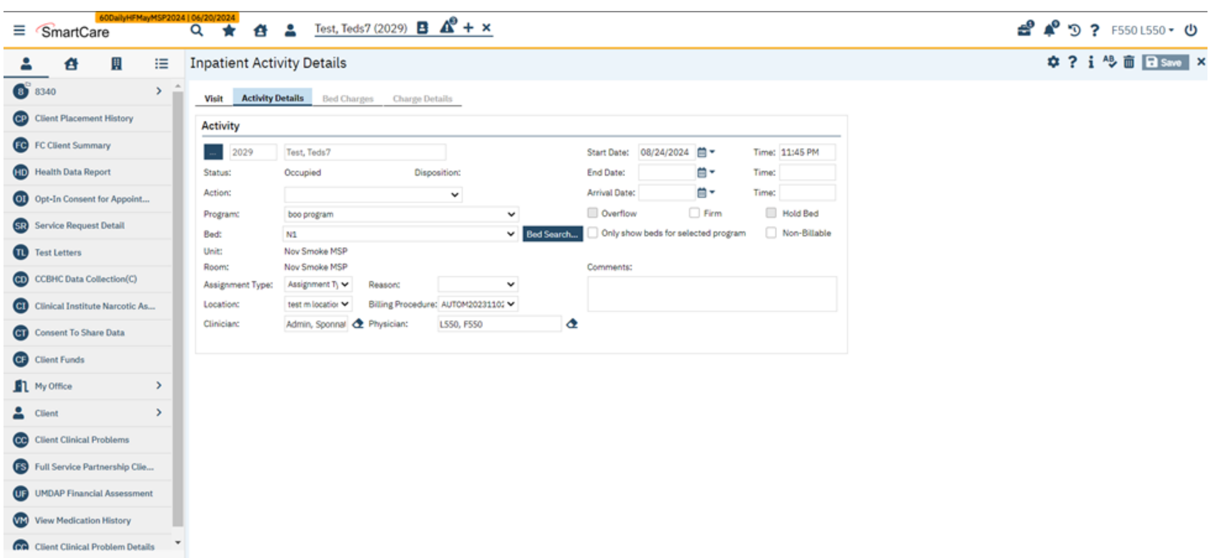


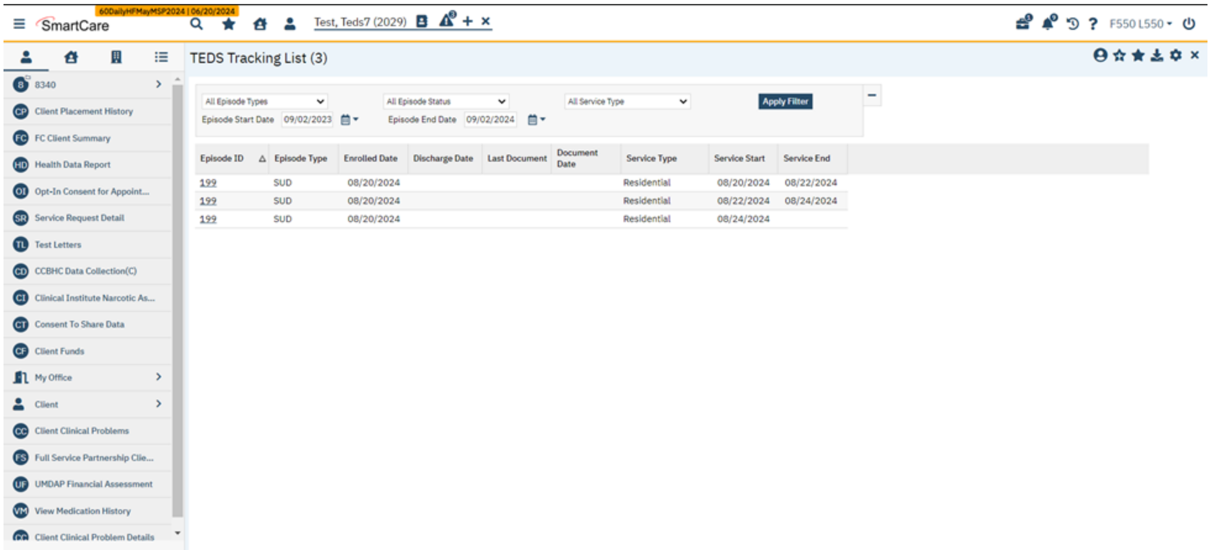


Bed Board/Bed Transfer:

When the System Configuration key 'SETAUTOPROGRAMASSIGNMENTDISCHARGE' is set to 'Yes,' and 'BEDPROGRAMENROLLMENT' is set to 'Enroll client automatically.' When users enrolls the client in a program through Bed Enrollment, the system will generate a TEDS episode for the client. Additionally, when the client is transferred to a new program through Bed Transfer, the system will generate a TEDS episode and sets the end date for the TEDS episode created through Bed Enrollment.

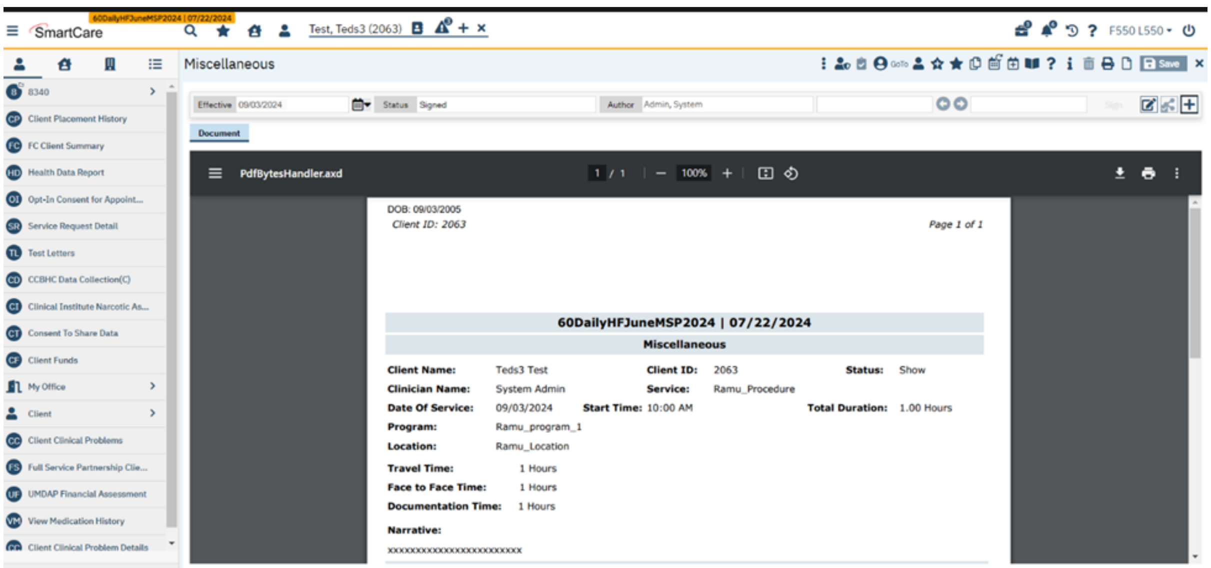
If the client already has the same episode type, a new TEDS episode will not be generated because an active TEDS episode already exists for the client.

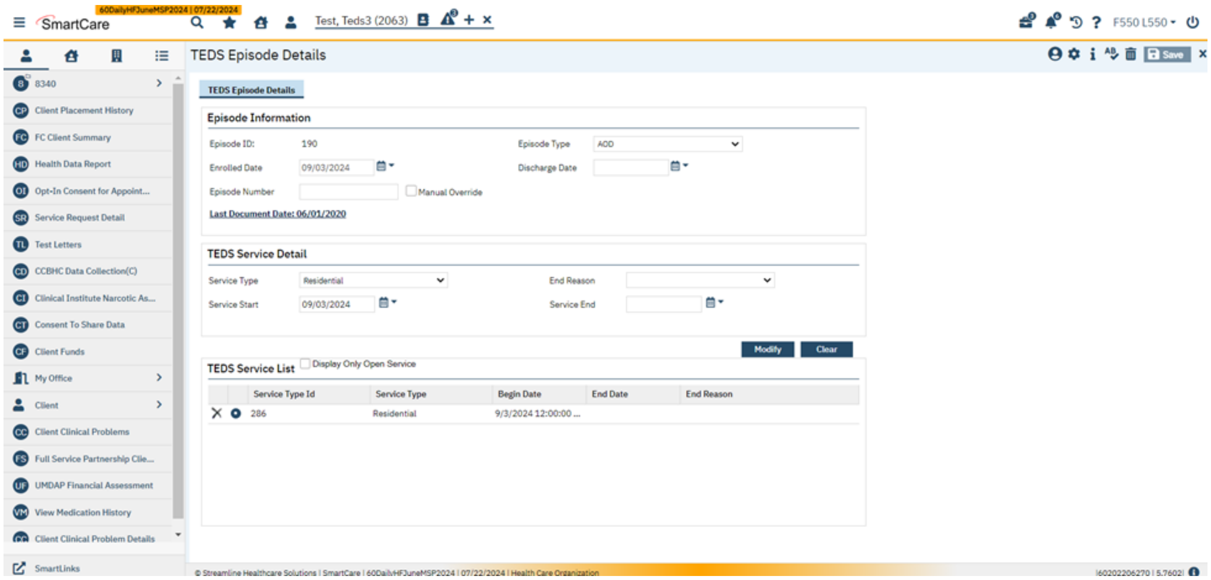




Services/Service Note

When a Service/Service Note is created for a procedure code mapped to the TEDS episode in the TEDS Setup List Screen, the System will generate the TEDS Episode for the client. If the client already has the same episode type, a new TEDS episode will not be generated because an active TEDS episode already exists for the client.





Author: Dinesh Ponnuswamy

300. Core Bugs # 128677: The 'TEDS Tracking List' Page is showing deleted records.

Prerequisites:

1.To create the TEDS episodes, follow these steps:

1. Select 'Client'.
2. Go to 'TEDS Setup List'.
3. Map the program into the TEDS Setup List.
4. Assign the mapped program to the client.
5. Go to the 'TEDS Tracking List' page.
6. The TEDS episode is created.

2.To delete the TEDS episodes, follow these steps:

1. Select 'Client'.
2. Go to the 'TEDS Tracking List'.
3. Click on the 'Episode ID' hyperlink.
4. Click on the 'Delete' icon.
5. The episode should be deleted.

Navigation Path: 'Client' search – select a 'Client' – 'TEDS Tracking List' page.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The deleted service records were displayed in the TEDS Tracking List Page.

With this release, the issue has been resolved. Now, the deleted service records are no longer displayed in the 'TEDS Tracking List' page.

Author: Dinesh Ponnuswamy

301. Core Bugs # 129154: A new TEDS episode was created, and the previous TEDS episode and program were discharged during bed transfer.

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

Naviga**tion Path:** Login to SmartCare – Client – Bed board (My Office) – Bed Transfer – Navigate to TEDS Tracking List Page.

Functionality 'Before' and 'After' release:
Before this release, here was the behavior. When a client was enrolled in a bed, a TEDS episode was generated. During a bed transfer, a new TEDS episode was created, and the previous TEDS episode and program were discharged.

With this release, the above mentioned issue has been fixed. Now, a new TEDS episode is not created during a bed transfer if the client already has an active TEDS episode. The previous TEDS episode's service, ends on the transfer date.

Telehealth

Reference No	Task No	Description
302	Core Bugs # 128943	Telehealth Zoom Meetings are deleted when the user is set to 'Show' status from the 'Reception/Front Desk' screen.
303	EII #127452	To implement Lifesize as the Telehealth meeting provider
304	EII #128065	SmartCare Telehealth Credential/password management [Support SSO for MS Teams (Telehealth) in SC]

Author: Manjunath Malipatil

302. Core Bugs # 128943: Telehealth Zoom Meetings are deleted when the user is set to 'Show' status from the 'Reception/Front Desk' screen.

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

Navigation Path 1: Client – Services – 'Services' list page -- Click on New icon -- 'Service Detail' screen -- Enter all the required fields -- click on save button – Click on telehealth Video icon – 'Telehealth Setup' popup -- Enter all the required details – click on 'Schedule Meeting' button -- Click on Close button.

Navigation Path 2: My Office -- 'Reception/Front Desk' – 'Reception/Front Desk' list page – Click the 'Scheduled' status hyperlink in the 'Status' column – 'Change Status' pop-up -- Change the status to 'Show' -- click on Change button.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the 'Reception/Front Desk', when the user changed the status of the telehealth service from Schedule to Show, the zoom telehealth meeting for the service was deleted.

With this release, the above-mentioned issue has been resolved. Now, the zoom telehealth meeting for the service is not deleted when the user changes the status of the telehealth service from 'Schedule' to 'Show' status in the 'Reception/Front Desk' screen.

Author: Manjunath Malipatil

303: EII # 127452: To implement Lifesize as the Telehealth meeting provider

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

Prerequisite:

1. Insert an entry for Life Size Provider in TelehealthProviders Table.
2. Create a Telehealth Credentials of Life Size in the Telehealth Credentials screen through the below mentioned **path:**

Login to SmartCare Application – Telehealth Credentials – select Life Size as provider from all Provider drop down. – Enter the life size details in the required fields – click on save button.

3.Assign the telehealth provider to the staff by inserting an entry in the Telehealthstaffaccess table.

Note: Life Size Provider configuration and Integration details will be provided in Technical Documentation uploaded in Zendesk.

Navigation Path 1: Login to SmartCare Application – Select a client - Services (Client) – Click on New button --- In service details screen enter all the required fields—click on Save button --- Click on Schedule Telehealth Meeting Icon --- Telehealth Setup pop up – Schedule the Meeting with Life Size provider – Save.

Navigation Path 2: Login to SmartCare Application – Select a client --- Services/Notes screen --- New --- In service Note details screen enter all the required fields --- Save --- Click on Schedule Telehealth Meeting Icon --- Telehealth Setup pop up -- Schedule the Meeting with Life Size provider – Save.

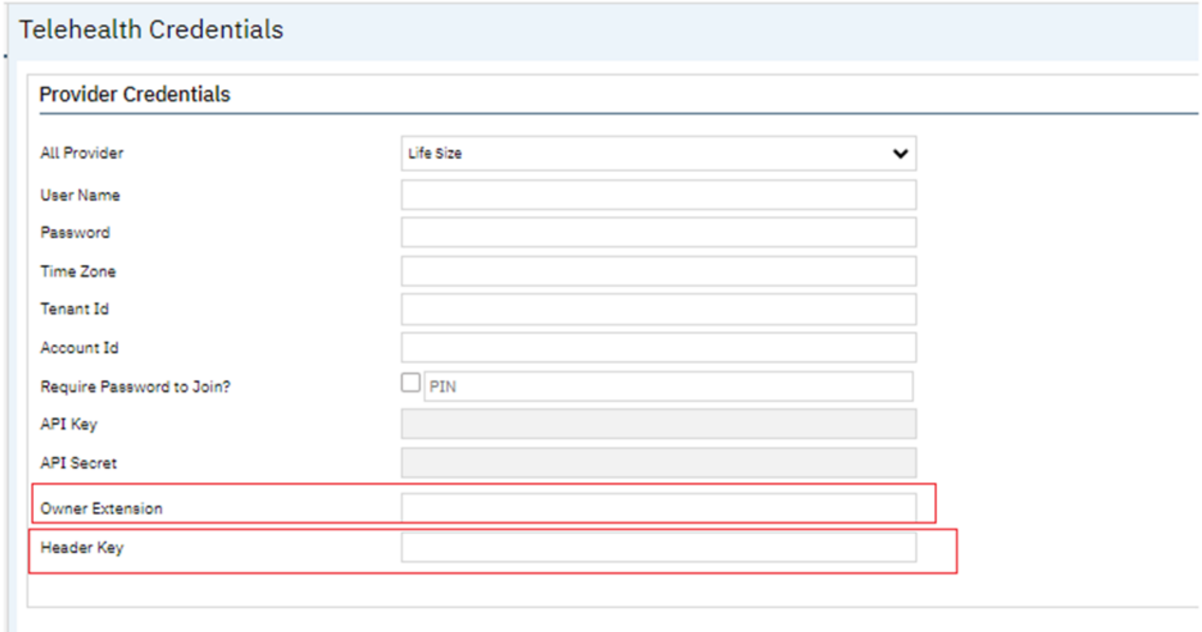
Navigation Path 3: Login to SmartCare Application – Groups (My Office) -- Click on Group Name hyperlink – Group Details page – Click on Schedule tab – Click on Schedule New Group Service button – Select the clients in the pop up and click on Select button – Group Service detail page – Enter all the details – Click on Save button --- Click on Select Action Icon -- Click on Schedule Telehealth Meeting -- Telehealth Setup pop up --- Schedule the Meeting with Life Size provider – Save.

Navigation Path 4: Login to SmartCare Application -- My Services (My office) screen – Under telehealth column Click on Add Hyperlink -- Telehealth Setup pop up --- Schedule the Meeting with Life Size provider – Save.

Functionality 'Before' and 'After' release:

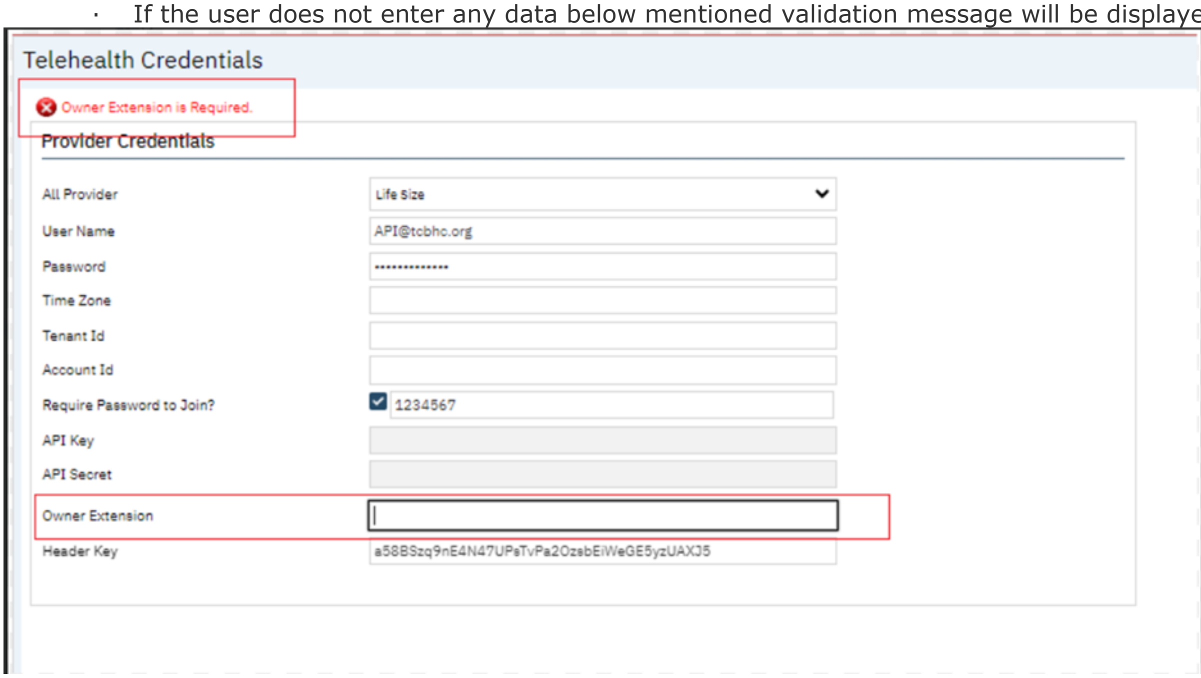
With this release, SmartCare will have ability to integrate with the online meeting service called Life Size so that the user can schedule a Telehealth service with Life Size provider.

Two new fields- **Owner Extension** and **Header Key** - are added in the Provider Credentials screen to create Life Size Telehealth Credentials.

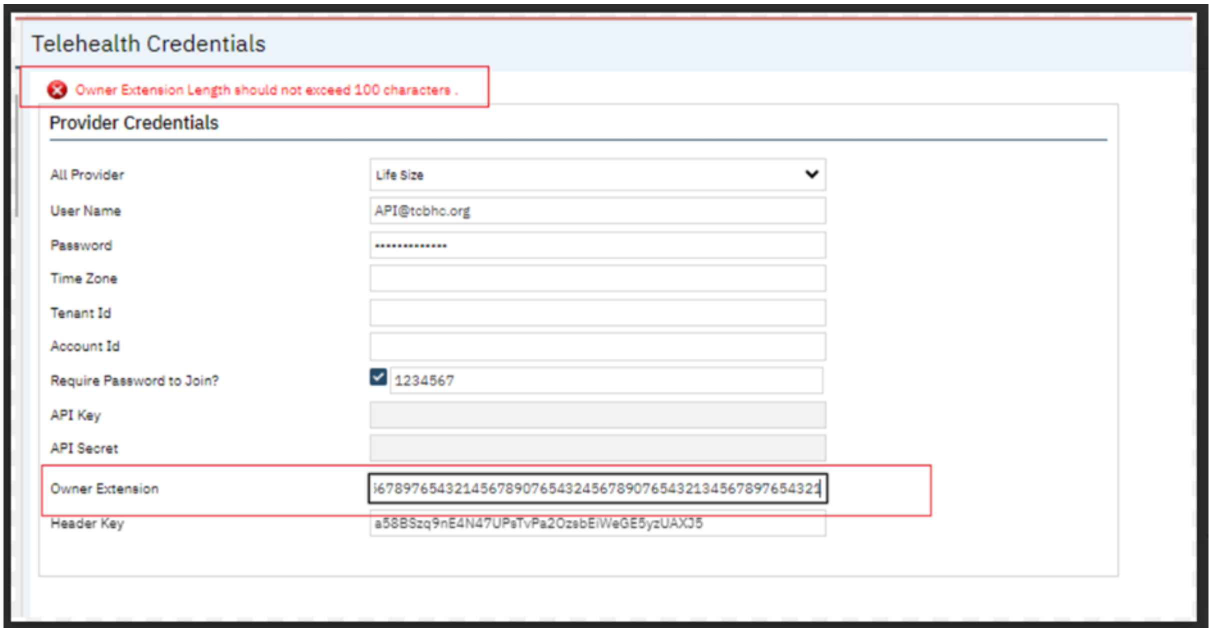


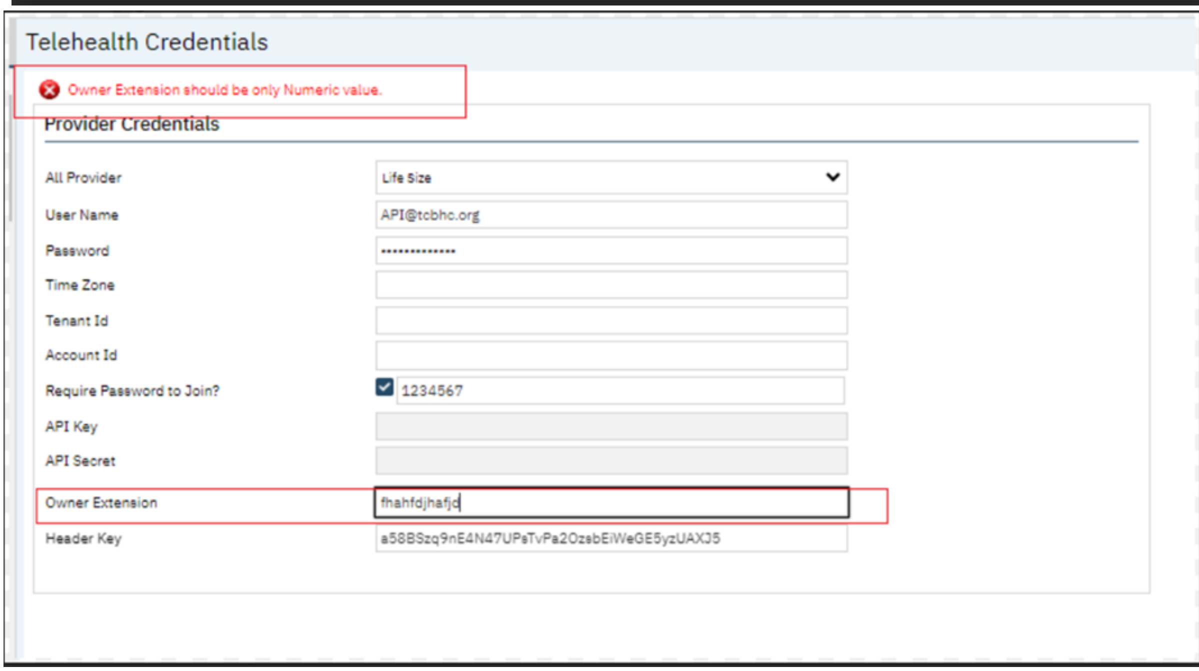
1. **Owner Extension:**

- This field is displayed only when the user selects Life size as a Provider.
- This is the required field to create a provider credential for Life size.
- If the user does not enter any data below mentioned validation message will be displayed



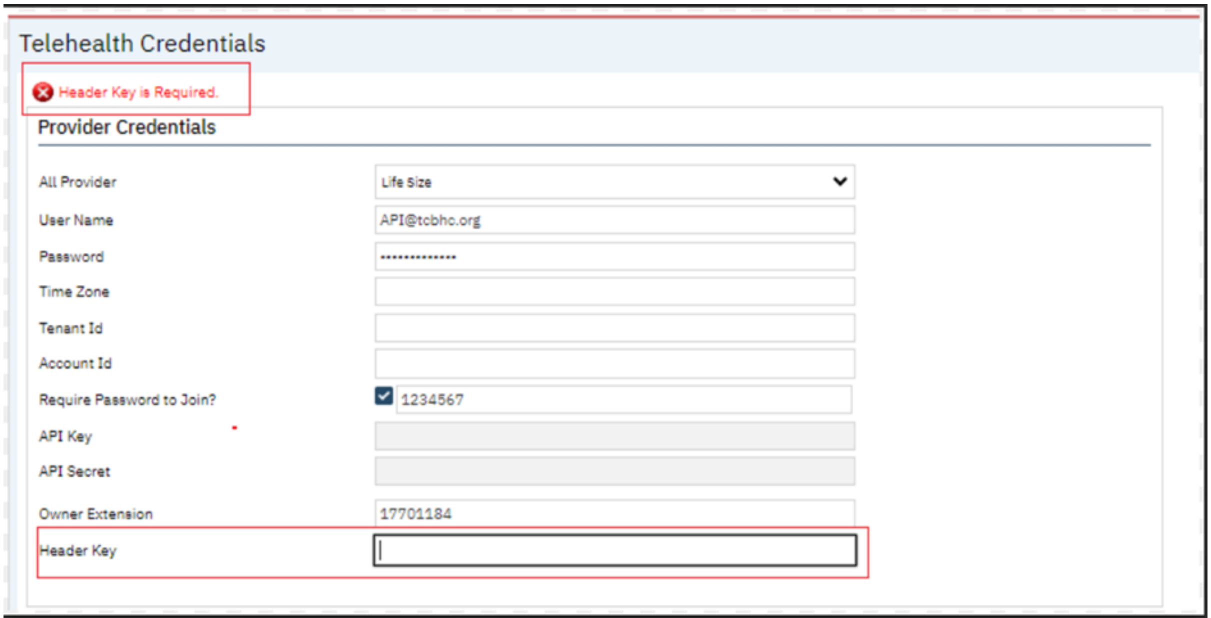
- This is the text box field which supports only numeric values and supports 100 characters. If user adds more than 100 characters below message will be displayed.



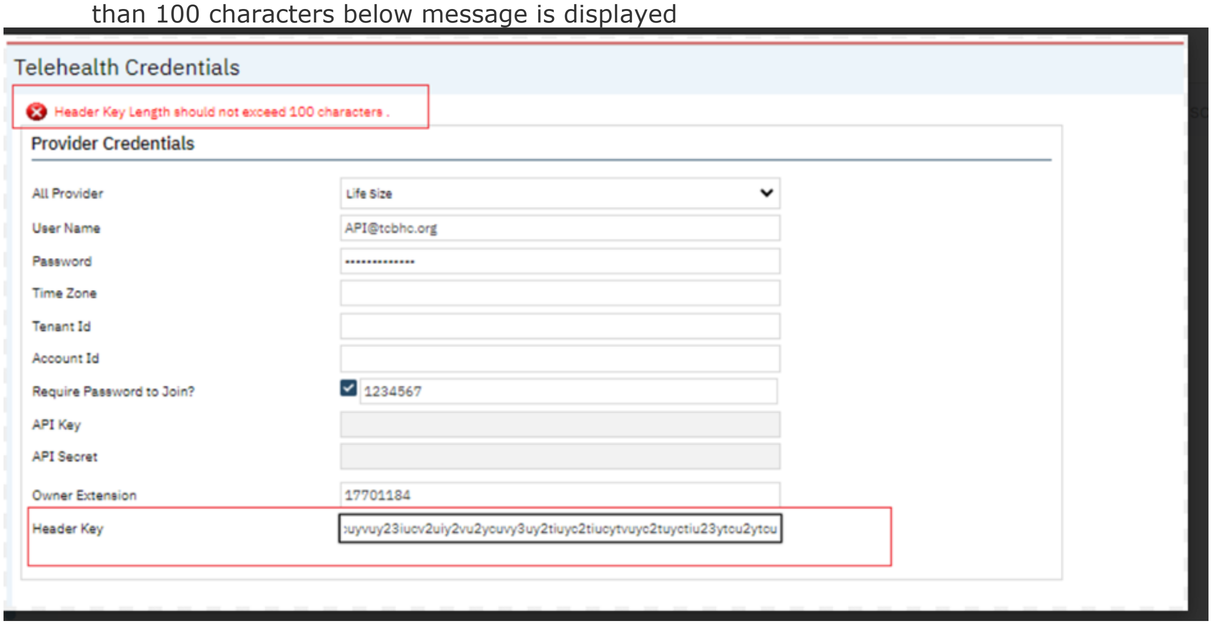


2. Header Key

- This field is displayed only when the user selects Life Size as a Provider.
- This is the required field to create a provider credential for Life Size.
- If the user does not enter any data below validation message will be displayed.

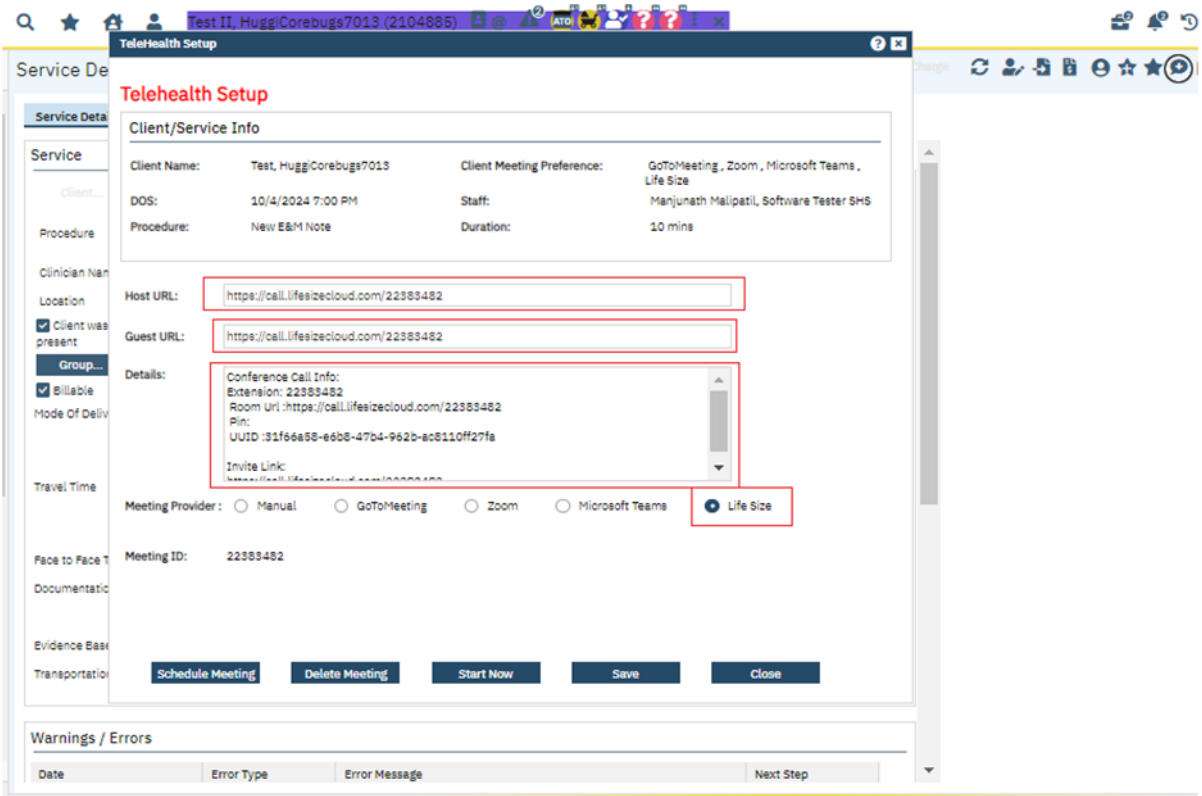


This is the text box field which supports varchar values and supports 100 characters. If user adds more than 100 characters below message is displayed

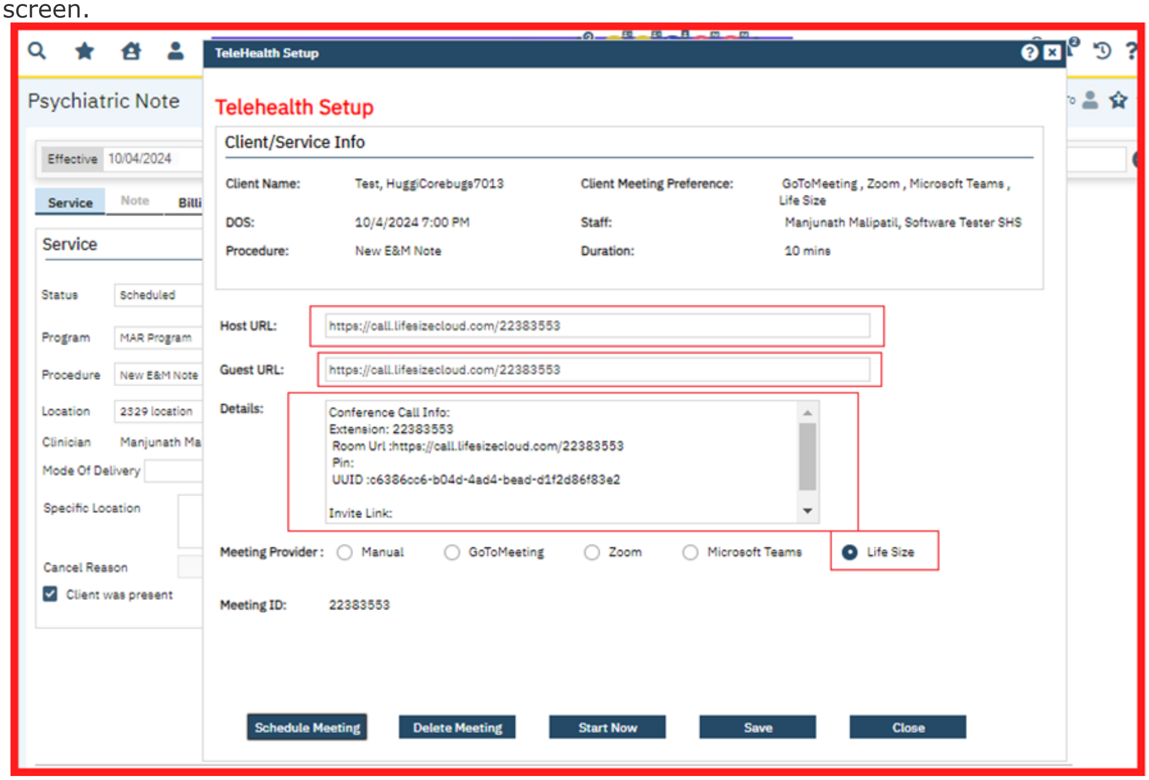


Once the User sets the telehealth provider credentials of Life size and staff has access to Life Size provider, Life Size provider option will be displayed in the Telehealth Setup and User will be able to schedule the Telehealth meeting with Life Size Provider.

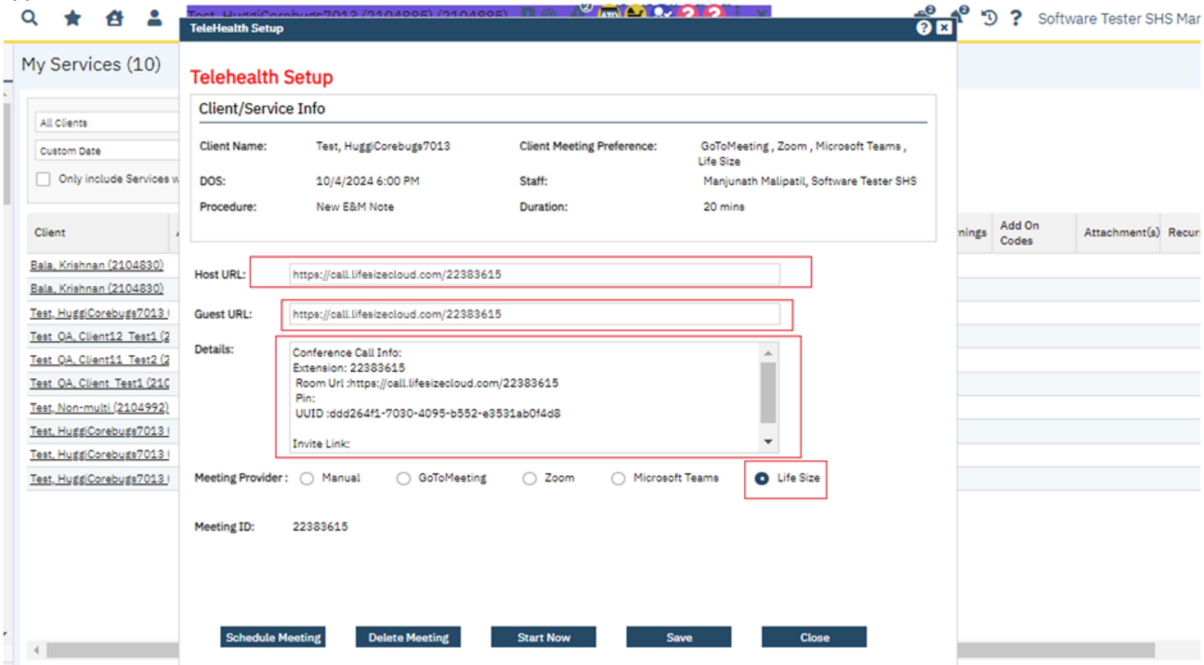
Below Screen shot, refers to the scheduling of telehealth meeting with Life Size provider in Service Details screen.



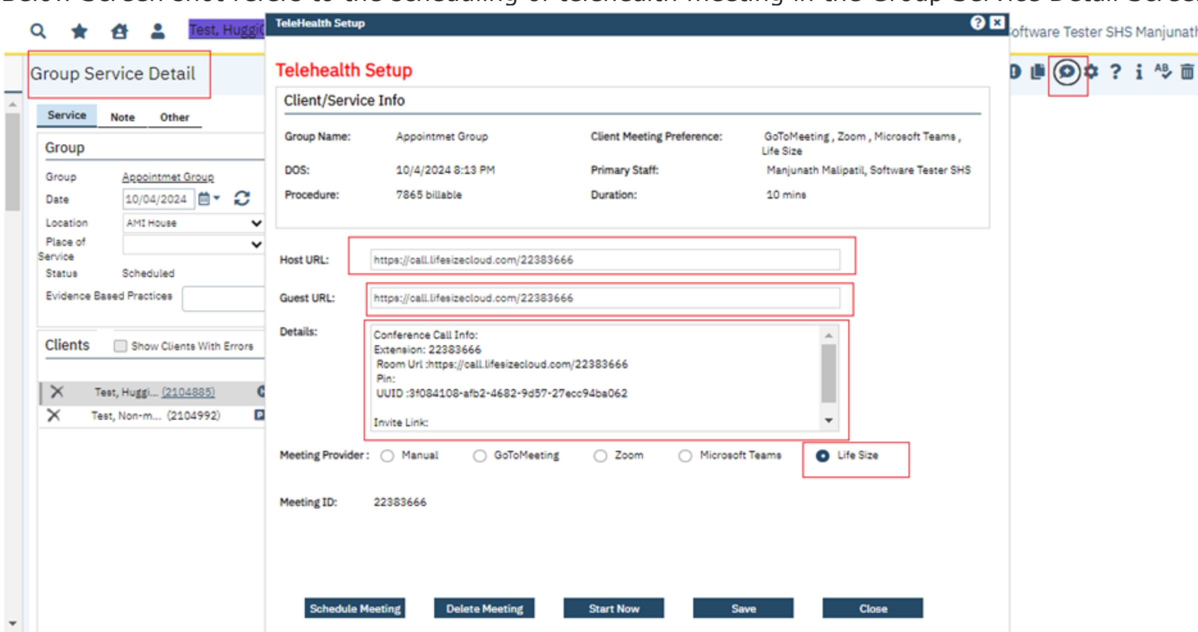
Below Screen shot refers to the scheduling of telehealth meeting with Life Size provider in Service Note Details screen.



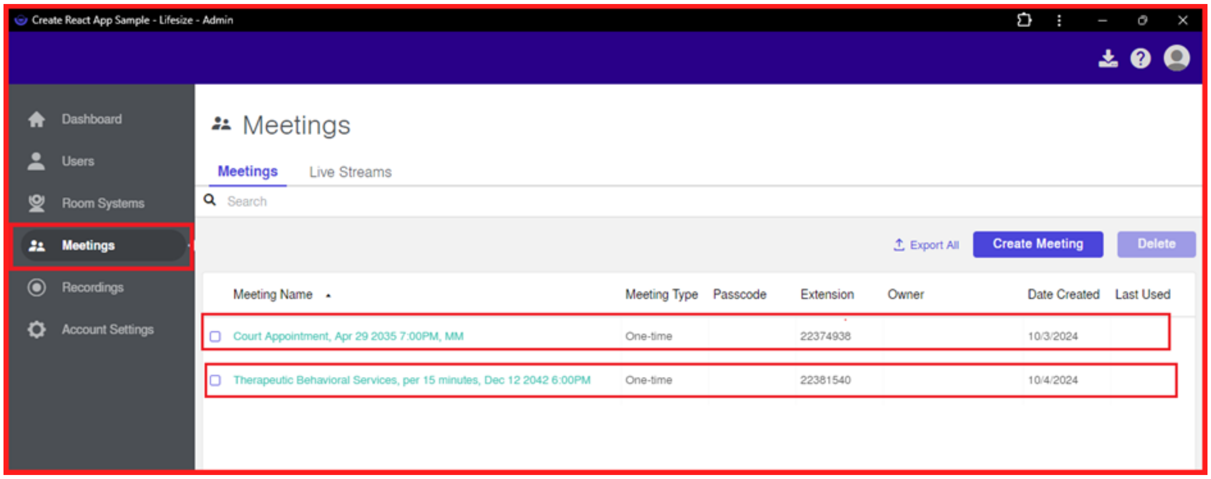
Below Screen shot refers to the scheduling of telehealth meeting in the My Service Screen by clicking on Add Hyperlink in the Telehealth column.



Below Screen shot refers to the scheduling of telehealth meeting in the Group Service Detail Screen.



Once the user Schedules the Telehealth meeting with Life size provider, an entry is created in the Life Size account in the Meetings section



Data Model Changes:

Two new columns named OwnerExtension and Headerkey are added to the table Telehealthcredentials.

Author: Sunil Belagali

304: EII # 128065: SmartCare Telehealth Credential/password management [Support SSO for MS Teams (Telehealth) in SmartCare].

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

Navigation Path 1: Login to SmartCare application – Client – Create a Service from any of these Screens (Group Services, Service Notes, Services) - Add a Telehealth Microsoft Teams meeting.

Navigation Path 2: Open the Microsoft Teams Calendar – Observe that the meeting is scheduled in the Calendar.

Functionality 'Before' and 'After' release:

Purpose: The Telehealth credentials screen is currently a static screen, therefore if a provider updates their password/credentials with SSO, the EHR team will have to manually update the credentials on the telehealth screen on the back end, for Teams to work. Team's credentials in SmartCare currently do not update with SSO. So it was requested to change it and make the Telehealth screen dynamic so that it updates with SSO when users' Teams credentials are created and updated.

With this release, SmartCare will now create a Telehealth Microsoft Teams meeting using Microsoft SSO provider. For this, Teams Telehealth Provider uses the global configuration key of an organization which is set in System configuration keys screen. The name of the keys are:

- **TelehealthClientId -** This is a key used to store Client ID of an organization, which is used by meeting providers such as Microsoft Teams, Zoom and GTM etc.
- **TelehealthTenantId -** This is a key used to store Tenant ID of an organization, which is used by meeting providers such as Microsoft Teams, Zoom and GTM etc.

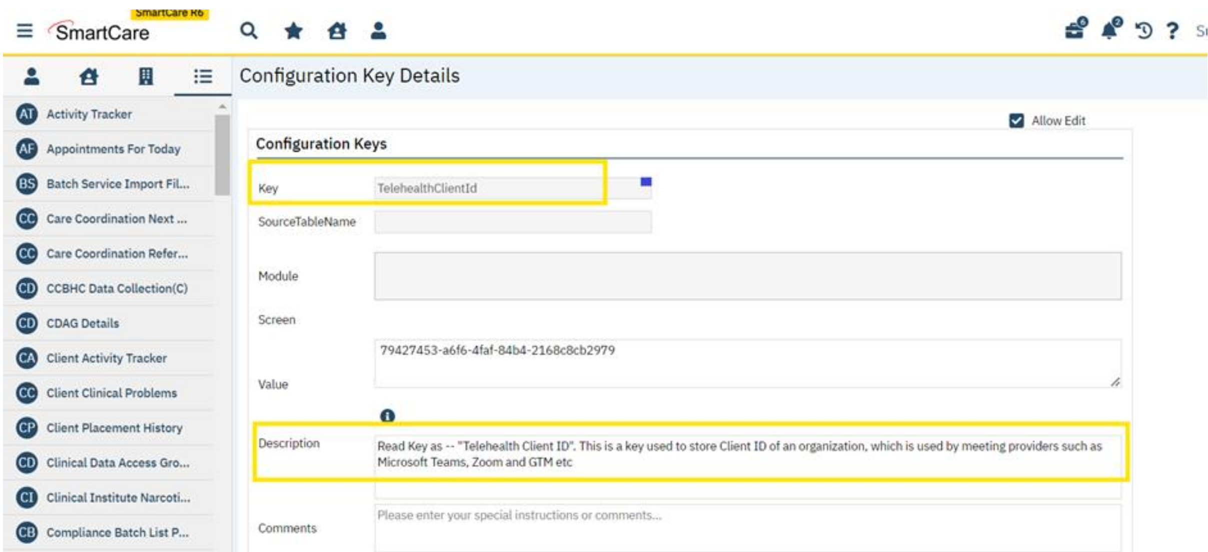
Note:

1. At present only the Microsoft Teams supports both the Keys.

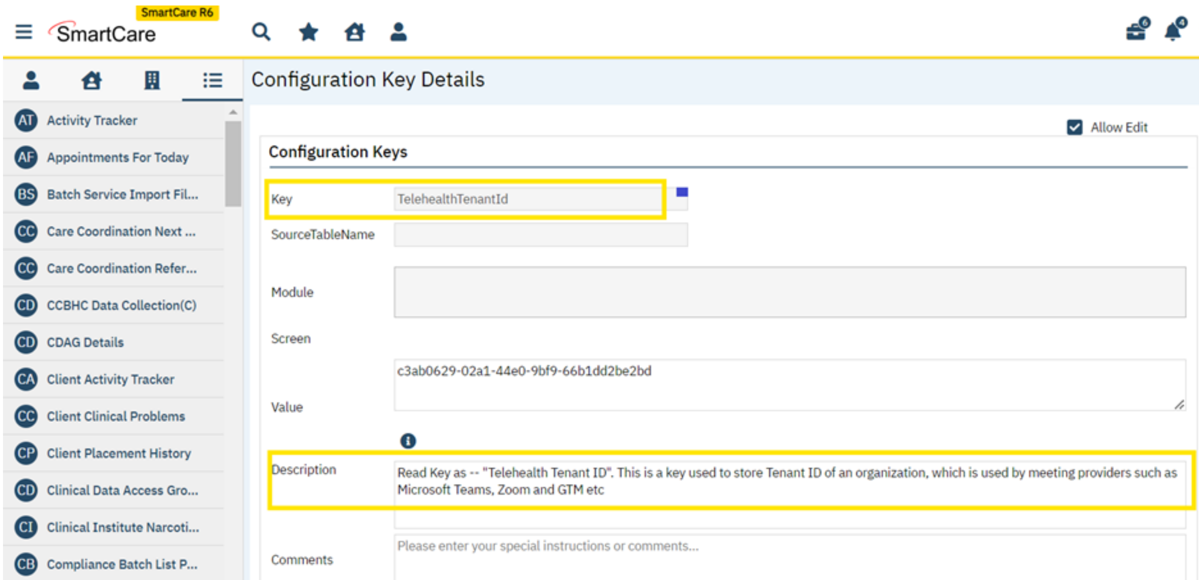
2. Before making changes here, there are some settings admin needs to do in the Azure App Registrations. **Please refer to these settings in Telehealth User setup guide**. The user still needs to have a Telehealth Credentials created, but the teams SSO provider won't use the values from that screen. It will use ClientId and TenantId from the above mentioned in System configuration keys.

SystemConfigurationKeys Details:

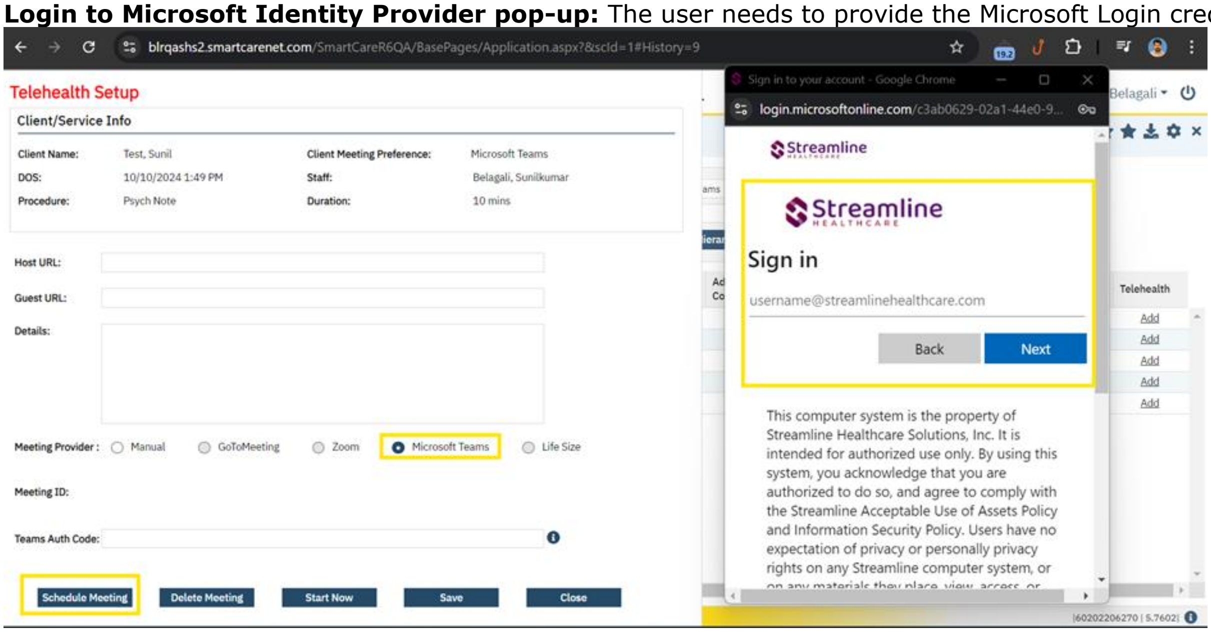
1. **SystemConfigKey :** TelehealthClientId
   Read Key as: Tele Health Client Id.
   Allowed Values: MSAL Client Id
   Default Value: Null
   Description: This is a key used to store Client ID of an organization, which is used by meeting providers such as Microsoft Teams, Zoom and GTM etc.



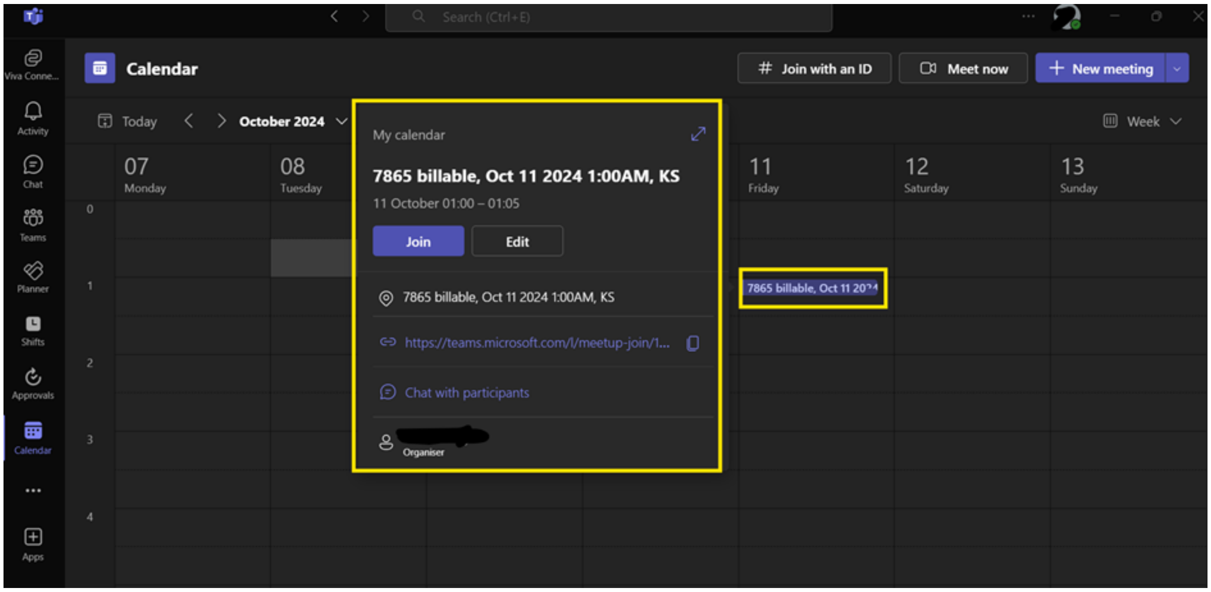
2. **SystemConfigKey :** TelehealthTenantId
Read Key as: Telehealth Tenant ID.
Allowed Values: MSAL Tenant Id
Default Value: Null
Description: This is a key used to store Tenant ID of an organization, which is used by meeting providers such as Microsoft Teams, Zoom and GTM etc.



- **Login to Microsoft Identity Provider pop-up:** The user needs to provide the Microsoft Login credentials



Created meeting updated in the Teams Calendar



Two/Multi Factor Authentication

Reference No	Task No	Description
305	Core Bugs #129395	'MFA' is not prompting for the user when he tries to log in to the 'SmartCare' application from a different computer.

Author: Sunil Belagali

305. Core Bugs: 129395:'MFA' is not prompting for the user when he tries to log in to the 'SmartCare' application from a different computer.

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

Prerequisite: System Configuration Key 'EnableMobileTFA' is set to 'Yes'.

Navigation Path: 'SmartCare' Login page – '2 Step Verification' popup – Click on 'Do not have access to Device?' hyperlink – 'Security Question' popup – Enter the 2FA sent in the mail – Click on 'Submit'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. When a user entered 'MFA' and logged into the 'SmartCare' application on one computer, and then tried to log in again from a different computer, the 'MFA' prompt was not triggered.

With this release, the above-mentioned issue has been Resolved. Now, when a user enters 'MFA' and logs into the 'SmartCare' application on one computer and then tries to log in again from a different computer, the 'MFA' prompt is triggered properly.

Whiteboard

Reference No	Task No	Description
306	Core bugs # 128860	Whiteboard: Whiteboard displays incorrect observation check.

Author: Shivakanth Moger

306. Core Bugs # 128860: Whiteboard: Whiteboard displays incorrect observation check.

Release Type: Fix **Priority:** High

Pre-requisites:
Log in to the 'SmartCare' - select any client - 'Client Orders'-- 'Client Orders' list page - New - 'Client Order' screen - search for any 'Safety Checks' order and sign the order .

Navigation Path 1: Go Search - 'Whiteboard'(My Office) – 'Whiteboard' screen - click on any time hyperlink text to the 'Next Check' column – 'Flow Sheet Detail popup' screen -add/modify some data and click on 'Save & Close' button.

Navigation Path 2: Go search -'Client Orders'- 'Client Orders' list page - New - 'Client Order' screen - search for the same 'Safety Checks' order and discontinue the order. -Click on New - 'Client Order' screen - search for any new 'Safety Checks' order and sign the order.

Navigation Path 3: Go Search - 'Whiteboard' – 'Whiteboard' screen - click on any time hyperlink text to the 'Next Check' column.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the whiteboard, when the user clicked on the time hyperlink text in the 'Next Check' column, the recently added observations were not displayed. This happened when a user discontinued the previously added safety order and after that created a new safety order in the client orders screen.
With this release, the above-mentioned issue has been fixed. Now, the recently added safety order observation is getting displayed when clicked on the time hyperlink text in the 'Next Check' column of the whiteboard screen.

Widgets

Reference No	Task No	Description
307	Core Bugs # 128816 && Core Bugs # 128869	Contacts/Flags Widget for Flags: Shows Nothing After Clicking a Link
308	Core Bugs # 128859	Taking more time to load My Caseload list page when clicking the hyperlinks in the Caseload widget.
309	Core Bugs # 128906	Error displayed while loading the Widgets in Dashboard.
310	Core Bugs # 129055	Error in Custom Widgets 'BMI' and 'Vitals' that has Button.

311	Core Bugs # 129081	Missing of the 'CustomeWidgetAjaxRequest()' function while developing widgets.
312	Core Bugs # 129101	Widgets loading/Time out issue in the Dashboard.
313	Core Bugs #129269	Widget Comment Remains visible on the screen even when navigated to other screens.
314	Core Bugs #129314	Dashboard: The changes made to the widgets are not saved after refreshing.
315	Core Bugs #129025	Staff documents were showing as double entries on the Supervision Reports.
316	Core Bugs # 129171	Incident Report Widget does not display the accurate number of reports from the 'Incident Reports' list page for 'Progress' and 'Assigned for Review'.

Author: Girish Jayanna

307. Core Bugs # 128816 & Core Bugs # 128869 : Contacts/Flags Widget for Flags: Shows Nothing After Clicking a Link.

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

Navigation Path: Dashboard -- 'Contact/Flags' Widget

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. When the user clicked on the count of flags hyperlink in the Contact/Flags widget, records did not appear in the Client Flag page. This is because the pregnancy indicator flag was triggered despite being marked as inactive.

With this release, the above mentioned issue has been resolved. Now, the logic is modified to display the count only for active flag types and now, on clicking the count of flags hyperlink in Contact/Flags widget, the records display properly.

Author: Suganya Sivakumar

308. Core Bugs # 128859: Taking more time to load My Caseload list page when clicking the hyperlinks in the Caseload widget.

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

Navigation Path: My Office -- Dashboard -- Search for Caseload widget -- In the Caseload widget -- Click on hyperlink in the 'Not Seen in 3 Months' column and 'Current' column hyperlink.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Caseload widget of Dashboard, when the user clicked the hyperlinks under the 'Not Seen in 3 Months' column or Current column, the system was taking more time to redirect My Caseload list page.

With this release, the above-mentioned issue has been resolved. Now, the system is redirected to the My Caseload list page without any slowness when the user clicks on the hyperlinks under the 'Not Seen in 3 Months' column or Current column in the Caseload widget. Also, the count of the Caseload widget and My Caseload list page matches correctly.

Author: Sunil Belagali

309. Core Bugs # 128906: Error displayed while loading the Widgets in Dashboard

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

Navigation Path: Login to SmartCare application – My Dashboard.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In 'My Dashboard' screen, a red error message was displayed while loading the Widgets.

Error: "Error while loading widget".

With this release, the above-mentioned issue has been resolved. Now, in the 'My Dashboard' screen, a red error message is not displaying and all widgets are loading properly.

Author: Sunil Belagali

310. Core Bugs # 129055: Error in Custom Widgets 'BMI' and 'Vitals' that has Button.

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

Navigation Path 1: 'Client' – Client Summary – 'SmartView' icon – 'BMI' widget and 'Vitals' widget.

Navigation Path 2: 'Client'– Client Dashboard– 'BMI' widget and 'Vitals' widgets.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. The custom widgets 'BMI' & 'VITAL' widgets were developed using XML format, thus causing the error when the user clicked on a Button added in Widget.

With this release, the above-mentioned issue has been resolved. Now, the custom widgets 'BMI' & 'VITAL' widgets are changed to JSON format and no error is generating when the user clicked on a Button added in Widget.

Author: Rakesh Nagangouda

311. Core Bugs # 129081: Missing of the 'CustomeWidgetAjaxRequest()' function while developing widgets.

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

Navigation Path 1: Login to SmartCare – 'My Office' – 'Dashboard' screen.

Navigation Path 2: Login to SmartCare – 'Client' – 'Client Dashboard' screen.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. While developing widgets, the user noticed that the function 'CustomeWidgetAjaxRequest()' was missing, which was leading to the below mentioned error message being displayed.

Error: 'Uncaught ReferenceError: CustomeWidgetAjaxRequest is not defined at HTMLSelectElement.onchange (SmartViewFrame.aspx:1:1) onchange @ SmartViewFrame.aspx:1'

With this release, the above-mentioned issues have been resolved. Now the function 'CustomeWidgetAjaxRequest()' has been added, so that he widgets are working fine.

Author: Rakesh Naganagoda

312. Core Bugs # 129101: Widgets loading/Time out issue in the Dashboard.

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

Navigation Path 1: Login to SmartCare – 'My Office' – 'Dashboard' screen – Observe the loading of the Widgets.

Navigation Path 2: Login to SmartCare – 'Client' – 'Client Dashboard' screen – Observe the loading of the Widgets.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. The users were experiencing the slowness in the loading of the Widgets and getting the Timeout Expired error.

With this release, the above-mentioned issues have been resolved. Now, the widgets performance has been increased and the Widgets are loading fine.

Author: Niroop Hassan

313: Core Bugs # 129269: Widget Comment Remains visible on the screen even when navigated to other screens.

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

Navigation Path: 'My Office – 'Dashboard' - 'Dashboard' page – 'Appointment for Today with Past Schedule' widget.

Functionality 'Before' and 'After' Release:

Before this release, here was the behaviour. In the 'Appointment for Today with Past Schedule' widget, when the user hovered over the comment icon, the comment remained visible on the screen even when navigated to other screens.

With this release, the above-mentioned issue has been resolved. Now, the comment is not visible when the user navigates to other screens.

Author: Rakesh Naganagoda

314. Core Bugs #129314: Dashboard: The changes made to the widgets are not saved after refreshing.

Release Type: Fix **Priority:** Medium

Navigation Path 1: Login to 'SmartCare' application – 'My Office' – 'Dashboard' screen -Click on the Edit Dashboard.
Navigation Path 2: Login to 'SmartCare' application – 'Client' search – 'Client Dashboard' screen--Click on the Edit Dashboard.

Functionality 'Before' and 'After' release:

Before this release, here was the behaviour. In the Dashboard Screen, when the users modified the widgets shape, size, location and saved it, then refreshed shared tables and logged out. After logging back to the application, the changes made to the widgets were not saved and it was retaining the original position and also errors were logged in the Errorlog table.

With this release, the above-mentioned issue has been resolved. Now, when the users modify the widgets shape, size, location and saves it, the changes made to the widgets are saved and able to see the saved changes to the widgets and all the widgets are loading fine without any issues in the Dashboard screen.

Author: Kiran Yogendra

315. Core Bugs # 129025: Staff documents were showing as double entries on the Supervision Reports.

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

Prerequisites: The Staff is assigned with In-Progress, Co-Sign, or To Acknowledge entries for multiple Service Notes/Documents.

Navigation Path: Dashboard – 'Supervisee Documents' widget – Click on the hyperlink Counts for Staff - Supervision Reports – Check if the entries are duplicated.

Functionality 'Before' and 'After' Release:

Before this release, here was the behavior. When the user tried to check on the Supervision Reports from the Dashboard, the entries were duplicated when compared to the actual entries on the Documents list page.

With this release, the above-mentioned issue has been resolved. Now, the entries are not duplicated on the Supervision Reports list page.

Author: Rakesh Gangadhar

316. Core Bugs # 129171: Incident Report Widget does not display the accurate number of reports from the 'Incident Reports' list page for 'Progress' and 'Assigned for Review'.

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

Prerequisite: Incident Reports with status "In Progress" and "Assigned for Review" is available.

Navigation Path: My Office -- 'Dashboard' -- 'Incident Reports (c)' Widget – click the number hyperlink for Progress – click the number hyperlink for 'Assigned for Review'.

Functionality 'Before' and 'After' release:

Before this release, here was the behavior. In the Incident Reports widget, the 'Progress' and 'Assigned for Review' did not display the accurate number of reports from the 'Incident Reports' list page.

With this release, the above-mentioned issue has been resolved. Now, the "Progress" and "Assigned for Review" number in the Incident Reports widget matches with the number of reports in the 'Incident Reports' list page.

Glossary of System Configuration Keys, Global Codes, Recodes, Data Model Changes.

System Configuration Keys

Global Codes

Recodes

Data Model Changes