# SmartCare™ August 2025 MSP Release Notes (Defects)

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### Audience

These release notes are for general SmartCare™ users trained in the basic workflow and use of SmartCare™.

### Applicable Releases

The functionality documented these release notes supports SC.CORE.6.0_1.37.000.2508.001 and later.

### Permissions

You can only access screens/items granted per your user login referred to as Permissions. Depending on your current level of permissions, you may need to contact your system administrator to have your permissions changed.

### Global Codes, Recodes, and Configuration Keys

Refer to the Global Codes, Recodes, and Configuration Keys sections of these release notes for a list and definition of each code or key.

# TASKS LIST-'DEFECT FIXES' (107)

**Note:** Defect fixes address issues or errors in the system to restore expected functionality and improve overall performance.

| Sl. No | Task No | Summary | Module Name |
|---|---|---|---|
| 4 | Core Bugs # 132752 | The saved reports are not displayed under the selected catalog Report section list. | Adhoc Reporting |
| 5 | Core Bugs # 132561 | Error displayed when service note is accessed from Alerts screen and signed. | Alerts |
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| 17 | Core Bugs # 132234 | Adjustments in 835 process calculate rounding fix incorrectly | Charges/Claims |
| 18 | Core Bugs # 132548 | Qualifying CCBHC Services not in Batch error not generating if one of the qualifying services has a Claims Generation Error | Charges/Claims |
| 19 | Core Bugs # 132578 | The 'Payer' field incorrectly defaulted to 'Commercial' instead of 'Select Electronic Remittance sender' in the Electronic Remittance pop-up screen | Charges/Claims |
| 20 | Core Bugs # 132589 | Decimal Claim unit values are rounded off to integer | Charges/Claims |

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| 21 | Core Bugs # 132824 | The 'Allowed Amount Adjustments' job step encountered a failure during the Nightly Billing job due to an issue with the length of the Place of Service value | Charges/Claims |
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| 26 | Core Bugs # 132601 | Client Information (Admin): in the ‘Contacts’ tab, the phone numbers are not appearing | Client Information |
| 27 | Core Bugs # 132684 | Incorrect Screen Name Displayed After Navigating from ‘My Documents (My Office)’ via Client Search | Client Information |
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| 29 | Core Bugs # 132736 | Client Information C screen: Irrelevant validation message is displayed when user tries to insert records into ‘List Of Releases' grid | Client Information C Screen |
| 30 | Core Bugs # 132559 | The ‘Admin in Last 24 Hours’ field is updated with the dose value in the ‘Client MAR’ screen when the Medication is administered with statuses such as ‘Refuse’, ‘Not Given’, or ‘Initial Refusal - Not Given’. | Client MAR |
| 31 | Core Bugs # 132728 | Client Order Details: Error on clicking History of Administration tab | Client MAR |
| 32 | Core Bugs # 132848 | Client MAR and Group MAR: Any changes to the dispense time will always create additional MAR records, and not remove the original dispense time. | Client MAR |
| 37 | Core Bugs # 132583 | ‘Clinic/Location’ selected from the drop-down in the ‘Order’ tab is not correctly displayed in the ‘Preference’ tab of the ‘Client Orders Details’ screen. | Client Orders |
| 38 | Core Bugs # 132791 | Laboratory Details Fetching Logic Changes | Client Orders |
| 39 | Core Bugs # 132799 | Service Not Being Created from Lab Order | Client Orders |

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| 40 | Core Bugs # 132802 | MAT: Received an Error on MAT Management when attempting to create an order. | Client Orders |
| 41 | Core Bugs # 132826 | Client Order PDF: Medication Instructions incorrectly showing on the Medication row | Client Orders |
| 42 | Core Bugs # 132857 | lab results with wrong client information in the Lab Result PDF in the SmartCare | Client Orders |
| 43 | Core Bugs # 132236 | To disable the barcode scanning functionality, a new System Configuration Key "EnableBarcodeScanning" is implemented. | Client Search |
| 44 | Core Bugs # 132213 | Selected Program was getting cleared upon Refreshing the Browser | Clinical Data Access Grouping |
| ~~49~~ | ~~Core Bugs # 132792~~ | ~~Assessment (C) : Error: Sub report could not be shown~~ | ~~Core Assessment~~ |
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| 51 | Core Bugs # 132696 | Crisis Call Log list Page: Duplicate records were displayed | Crisis Call Log |
| 52 | Core Bugs # 132721 | Crisis Call Log Details screen: Treatment team member was blank in the Client Information (Potential) section | Crisis Call Log |
| 53 | Core Bugs # 132628 | Widget column headers showing attribute name instead of display as Value | Dashboard |
| 54 | Core Bugs # 132718 | Tracking Widget Radio Buttons Not Working Properly | Dashboard |
| 60 | Core Bugs # 132537 | Documents: Reviewer Co-signer issue. | Documents |
| 61 | Core Bugs # 132547 | Inactive staff were displayed in Acknowledgements and Comments section for “To Acknowledge” status. | Documents |
| 62 | Core Bugs # 132581 | PHQ-9 and PHQ-A document – ‘Addition Questions’ section still displays even if the system configuration is turned off. | Documents |
| 63 | Core Bugs # 132677 | The ‘Remain open’ programs are not displayed in the PDF of the 3rd and 4th versions of the ‘Agency/Program Discharge’ document. | Documents |
| 64 | Core Bugs # 132724 | All the Documents are not listed in ‘Attach/Review Documents’ and ‘Associate Documents’ popups. | Documents |

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| 65 | Core Bugs # 132759 | When staff tried to add client to cosign, wrong staff name was populating in the cosigner list. | Documents |
| 67 | Core Bugs # 132542 | The label-type Form Item in the 'Custom' tab did not display the ID value (ID field appeared blank). | Dynamic Forms (DFA) |
| 68 | Core Bugs # 132555 | BQuIP - SUD Screening document radio button display issue. | Dynamic Forms (DFA) |
| 69 | Core Bugs # 132646 | Documents: Errorlog issue | Errorlog |
| 70 | Core Bugs # 132665 | Errorlog was getting logged when a user attempted to login to SmartCare application | Errorlog |
| 71 | Core Bugs # 132692 | Flow sheet List Page: Health Data element description name does not fit in the column | Flow Sheet |
| 73 | Core Bugs # 132595 | Recurring Group Services have old diagnosis attached to recurring services and do not update when diagnosis is updated. | Group Services |
| 74 | Core Bugs # 132705 | Recurring Group Services have old diagnosis attached to recurring services and do not update when diagnosis is updated. | Group Services |
| 75 | Core Bugs # 132715 | Groups: Duplicate services are created for the client. | Group Services |
| 76 | Core Bugs # 132820 | Getting an error message when trying to open services from the 'Document To Do' widget. | Group Services |
| 77 | Core Bugs # 132876 | Group Services – Mode of Delivery issues. | Group Services |
| 78 | Core Bugs # 132350 | The 'Ethnicity', 'Race' and 'Client declined to Provide' field code names were sorted 'Alphabetically' not based on 'Sort Order' | Inquiry |
| 79 | Core Bugs # 132532 | Inquiry Save Restricted: Missing Staff or Workgroup error | Inquiry |
| ~~82~~ | ~~Core Bugs # 131825~~ | ~~MAT: System is allowing Pre pour the future Face To Face dose and to be dispensed.~~ | ~~Methadone~~ |
| ~~84~~ | ~~Core Bugs # 132415~~ | ~~MAT: Client Column on 'MAT Management' List Page is too Narrow and 'Bottle/Box ID' Limited to 5 Characters on the 'Medication/Lot/Bottle Details' Screen.~~ | ~~Methadone~~ |
| ~~85~~ | ~~Core Bugs # 132488~~ | ~~MAT: Incorrect status is displayed in MAT Management List page after a Take Home and Face to Face dispense.~~ | ~~Methadone~~ |
| ~~86~~ | ~~Core Bugs #132647~~ | ~~Issues in the 'MAT Management Details' screen~~ | ~~Methadone~~ |

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| ~~87~~ | ~~Core Bugs # 132685~~ | ~~MAT: 'Units' dropdown value is defaulted to 'mg' in the 'Medication/Lot/Bottle Details' screen.~~ | ~~Methadone~~ |
| ~~88~~ | ~~Core Bugs # 132726~~ | ~~MAT - Dispense History Grid Cutting off Rows of Dat~~ | ~~Methadone~~ |
| ~~89~~ | ~~Core Bugs # 132730~~ | ~~MAT: Successful dispense is not displayed on the MAT Management list and details pages.~~ | ~~Methadone~~ |
| ~~90~~ | ~~Core Bugs # 132731~~ | ~~MAT: Stuck in infinite loop after Calibration process when saying 'No' to Unprime prompt~~ | ~~Methadone~~ |
| ~~91~~ | ~~Core Bugs # 132755~~ | ~~MAT - MAT Medication Mapping incorrect within Recode SetMedicationForMATMultiInventoryDispense~~ | ~~Methadone~~ |
| ~~92~~ | ~~Core Bugs # 132764~~ | ~~MAT: Program Filter on MAT Management List page is not working.~~ | ~~Methadone~~ |
| ~~93~~ | ~~Core Bugs # 132821~~ | ~~Med/lot/bottle bulk insert~~ | ~~Methadone~~ |
| ~~94~~ | ~~Core Bugs # 132707~~ | ~~The PDF incorrectly displayed the clinician's signing suffix next to the client's name when signed via the mobile WebApp.~~ | ~~Mobile~~ |
| 96 | Core Bugs # 132663 | 3 Slowness in the Staff Calendar screen. | My Calendar |
| 97 | Core Bugs # 132739 | My Calendar: Issue with using Quotation Mark in 'Comments' section while creating a Service | My Calendar |
| 98 | Core Bugs # 132811 | New Calendar Entry items not synching with Outlook | My Calendar |
| 111 | Core Bugs # 132321 | The 'ClientWasPresent' flag is not present in the 'Services with Procedure Rate Errors' Report. | My Reports |
| 112 | Core Bugs # 132572 | Payment Receipt Report' Issue. | My Reports |
| 113 | Core Bugs # 132709 | Getting an error when generating 'ER Claim Line Details' or 'ER Claim Line Details CSV' reports. | My Reports |
| 114 | Core Bugs # 132796 | Reports name not displayed correctly in search bar. | My Reports |
| 115 | Core Bugs # 132847 | Some fields are removed from the XML files for some record types in the IPFQR List Page. | My Reports |
| 116 | Core Bugs # 132858 | Incident Reports list page and widget not showing accurate number of incidents. | My Reports |

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|---|---|---|---|
| 118 | Core Bugs # 132538 | Patient Portal login issue. | Patient Portal |
| 119 | Core Bugs # 132437 | Coverage: Leading/trailing spaces are preventing the duplicate prevention validation message from triggering correctly. | Plans |
| 121 | Core Bugs # 132551 | Expired ProcedureRateId are retrieving when service is created. | Procedures/Rates |
| 122 | Core Bugs # 132617 | The 'Assigned Staff' dropdown excluded inactive staff for existing client program entries in the 'Program Assignment Details' page. | Programs |
| 123 | Core Bugs # 132717 | The Contract Details screen was labeled with the same name in both the Provider Contracts and Contracts screens | Provider Contract |
| 125 | Core Bugs # 132641 | The Appointment is duplicating when attempting to reschedule. | Reception |
| 131 | Core Bugs # 132267 | Start page: Outbound Prescribers are displayed as blank when filtered by clinicians in the database while running the specific stored procedure. | Rx Application |
| 132 | Core Bugs # 132592 | RX - Patient Summary - Medication list is not loading. | Rx Application |
| 133 | Core Bugs # 132625 | Rx: duplicate instructions were displayed for existing client order under the Medication List section in the Patient Summary page | Rx Application |
| 134 | Core Bugs # 132813 | Slowness when navigating from SmartCare to Rx | Rx Application |
| 135 | Core Bugs # 132854 | The 'X' button was visible for SmartCare Orders in the Patient Summary screen, despite being non-functional. | Rx Application |
| 136 | Core Bugs # 132855 | Inactive allergies are displayed in the 'Current Allergies' widget of SmartView. | Rx Application |
| 137 | Core Bugs # 131096 | 'Acknowledgements' and 'Acknowledge with Comments/ Forward Acknowledgement' icons are not showing as intent in Scanned and Uploaded Documents | Scanning |
| 139 | Core Bugs # 132495 | The disabled delete (X)icon in Custom grid was getting activated for the restricted Staffs and Roles | Screens |
| 140 | Core Bugs # 132476 | MCO-PM Transfer: Claim Count Did not match at the different steps in the process. | Service from Claims |

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| 142 | Core Bugs # 132282 | The calculation of the procedure rate was not correct, when a service was created | Services |
| 143 | Core Bugs # 132385 | Services: application allowed the users to change the service's status from Complete to No Show across browsers. | Services |
| 144 | Core Bugs # 132603 | Separate Dx code for Add On services in Primary Care | Services |
| 145 | Core Bugs # 132635 | Individual services just "popped up" in the last 5 hours. | Services |
| 146 | Core Bugs # 132699 | Batch Service Import: Upload New Services pop up is displayed blank. | Services |
| 147 | Core Bugs # 132765 | a "Timeout Expired" error is logged in the 'ErrorLog' table. | Services |
| 148 | Core Bugs # 132785 | 'Services (My Office) List' page: Implemented a new 'Failed Services' pop-up for error and mass complete for services. | Services |
| 150 | Core Bugs # 132531 | The client name is not displayed when opening a private window from the 'Service Note' page. | Services/Notes |
| 151 | Core Bugs # 132582 | The system was not displaying all the available procedures in the dropdown, regardless of the selected program. | Services/Notes |
| 152 | Core Bugs # 132620 | JavaScript error is logged on the 'ErrorLogViewer'. | Services/Notes |
| 153 | Core Bugs # 132706 | The 'GOALOBJECTIVESTATUS' Global Code Sort Order is not being honored in the DFA note. | Services/Notes |
| 154 | Core Bugs # 132535 | list pages: Export Button Fails to Generate Download | SmartCare improvements |
| 155 | Core Bugs # 132834 | Unsupported Browser Warning for Microsoft Edge Mobile on SmartCare | SmartCare improvements |
| 156 | Core Bugs # 132880 | The credentialing grid failed to load all existing details in the 'Credentialing' tab of the 'Staff Details' screen. | Staff/Users |
| 157 | Core Bugs # 132727 | The 'Export' Functionality is not working in the 'Work Groups' List Page | Work Groups list screen |

# Functionality Task Details

## Adhoc Reporting

| Reference No | Task No | Description |
|---|---|---|
| 4 | Core Bugs #132752 | The saved reports are not displayed under the selected catalog Report section list. |

**Core Bugs # 132752: The saved reports are not displayed under the selected catalog Report section list.**

**What's fixed:** Saved reports were not appearing under the selected **Catalog Report** section in the **Ad-hoc Reporting** screen when staff members without access to the **Share Report – Adhoc** screen changed the catalog from the dropdown.

The system now correctly displays saved reports under the selected catalog, regardless of the user's access to the **Share Report – Adhoc** screen.

**Where to find it:**
**My Office** → Search **Ad-hoc Reporting** → **Catalogs** dropdown → **Change catalog** → Verify saved reports under selected catalog

# Alerts

| Reference No | Task No | Description |
|---|---|---|
| 5 | Core Bugs # 132561 | Error displayed when service note is accessed from Alerts screen and signed |

**Core Bugs # 132561: Error displayed when service note is accessed from Alerts screen and signed**

**What's fixed:** Previously, when staff accessed a service note with **'In Progress'** status from the Alerts screen and attempted to **Save** or **Sign**, the system displayed an error message:
**"Saved Successfully. Error occurred while loading screen."**

The error message no longer appears when signing or saving service notes accessed from the Alerts screen.

**Where to find it:**
**My Office** → **Alerts** → Access a service note with status "In Progress" → Save or Sign

# Authorizations

| Reference No | Task No | Description |
|---|---|---|
| 7 | Core Bugs # 132763 | Service Request – Review/Approval Detail: The 'Review Status' is not updating to 'Completed' status. |

**Core Bugs # 132763: Service Request – Review/Approval Detail: The 'Review Status' is not updating to 'Completed' status.**

**What's fixed:** In the **Service Request – Review/Approval Detail** screen, the **Review Status** was not updating to **Completed** after saving multiple entries in the **Service Request Details** grid. This caused confusion and incomplete tracking of review progress.

The system now automatically updates the **Review Status** to **Completed** when multiple records are inserted and saved in the **Service Request Details** section, ensuring accurate status tracking.

**Where to find it:**
**Client** → **Search** → Select a **Client** → **Service Request – Review/Approval List** → **New** → **Approval**

tab → **Service Request Details** → Fill required fields → Check **Generate Authorization** → **Insert** → **Save** → **Add another record** → **Insert** → **Save**

# Batch Eligibility

| Reference No | Task No | Description |
|---|---|---|
| 10 | Core Bugs # 132653 | The Batch Eligibility Configuration Id to be mapped with Existing Configuration Id of Clearing House. |

### Core Bugs # 132653: The Batch Eligibility Configuration Id to be mapped with Existing Configuration Id of Clearing House.

**What's fixed:** In the **Batch Eligibility Configurator**, new records were incorrectly creating duplicate entries in the **ElectronicEligibilityVerificationConfigurations table**, and several fields were not validating or mapping correctly. This caused issues with clearing house selection and batch record creation.

The system now correctly maps new batch records to an existing **ElectronicEligibilityVerificationConfigurationId** based on the selected Clearing House, preventing duplication and improving configuration accuracy.

**Key Fixes:**

- New batch records no longer create duplicate entries in the ElectronicEligibilityVerificationConfigurations table.
- Records are now created in the ElectronicEligibilityVerificationConfigurationFeatures table using the existing configuration ID.
- Each **Clearing House** is limited to one configuration record.
- The **Electronic Eligibility Verification Payer** field now updates the ElectronicPayerNameMCD with the correct value in the CharacterValue column.
- The **Stored Procedure to Customize Eligibility Clients Update** and **Final Result Set** fields now only accept the underscore (_) symbol.
- The **Clearing House** dropdown only displays records that exist in the ElectronicEligibilityVerificationConfigurations table.
- If only one Clearing House exists, the dropdown defaults to blank, requiring manual selection. The system then correctly sets the configuration ID based on the selected Clearing House.

**Where to find it:**
**Administration** → **Batch Eligibility Configurator List** → **New** → **Batch Eligibility Configurator Details** → Fill required tabs → **Save**

# Batch Services

| Reference No | Task No | Description |
|---|---|---|
| 11 | Core Bugs # 132632 | Some of the services created from the Batch Service Entry were missing. |
| 12 | Core Bugs # 132890 | Batch service import is failing to upload the file. |

### Core Bugs # 132632: Some of the services created from the Batch Service Entry were missing.

**What's fixed:** Some services created through **Batch Service Entry** were not appearing in the **Services** list for selected clients and dates.

All services created via **Batch Service Entry** now display correctly in the **Services** list.

**Where to find it:**

**Option 1:** Go to **Batch Service Entry** → Create services for multiple clients and dates → **Save**

**Option 2:** Search for a client → Go to **Services (Client)** → Apply filters → Confirm all batch-created services are listed

### Core Bugs # 132890: Batch service import is failing to upload the file.

**What's fixed**: File uploads in the **Batch Service Import** screen were failing when the **Time** column in the file was formatted as Text, General, or any non-standard format. Users saw a blank popup and the following error message:

**Error Message:**
"Conversion failed when converting date and/or time from character string. The data for table-valued parameter "@BatchServiceDataTable" doesn't conform to the table type of the parameter. SQL Server error is: 241, state: 1. The statement has been terminated."

The system now successfully accepts files regardless of how the **Time** column is formatted (Text, General, or Time). No error messages are displayed, and the upload process works as expected.

**Where to find it:**
**Batch Service Import Files** → Select **file** → Click **Upload** → **Services (My Office)**

# Bedboard

| Reference No | Task No | Description |
|---|---|---|
| 13 | Core Bugs # 132626 | Program still appeared on the 'Programs' list page even though both Bed Assignment Activity and Inpatient Activity records are deleted for a discharged client. |
| 14 | Core Bugs # 132816 | Bedboard: duplicating a bed assignment |

### Core Bugs # 132626: Program still appeared on the 'Programs' list page even though both Bed Assignment Activity and Inpatient Activity records are deleted for a discharged client.

**What's fixed:** In the **Programs** list page, a bed program continued to appear for discharged clients even after both the **Bed Assignment Activity** and **Inpatient Activity** records were deleted. This caused outdated program data to remain visible.

The system now correctly removes the bed program from the **Programs** list once both related activity records are deleted for a discharged client, ensuring accurate program tracking.

**Where to find it:**

1. **My Office** → **Bedboard** → **Bedboard** list page → Select **discharged bed** → Click **Discharged** status → **Inpatient Activity Details** → **Delete** → Click **Occupied** status → **Delete**
2. **Client** → **Programs** → **Programs** list page

### Core Bugs # 132816: Bedboard: duplicating a bed assignment

**What's fixed:** In **Bedboard**, duplicate bed assignments were being created when users admitted, transferred, or discharged clients. This led to inaccurate occupancy data and confusion in bed tracking. The system now prevents duplicate bed assignments during these actions, ensuring accurate and reliable bed status updates.

**Where to find it:**
**My Office** → **Bedboard** → **Bedboard list page** → Select **Occupied from All Status** dropdown → **Apply Filter**

# Charges/Claims

| Reference No | Task No | Description |
|---|---|---|
| 16 | Core Bugs #132145 | ‘Allowed Amount Adjustment' column field was not defaulted from the template plan if not specified. |
| 17 | Core Bugs # 132234 | Adjustments in 835 process calculate rounding fix incorrectly |
| 18 | Core Bugs # 132548 | Qualifying CCBHC Services not in Batch error not generating if one of the qualifying services has a Claims Generation Error |
| 19 | Core Bugs # 132578 | The ‘Payer’ field incorrectly defaulted to ‘Commercial’ instead of ‘Select Electronic Remittance sender’ in the Electronic Remittance pop-up screen. |
| 20 | Core Bugs # 132589 | Decimal Claim unit values are rounded off to integer |
| 21 | Core Bugs # 132824 | The 'Allowed Amount Adjustments' job step encountered a failure during the Nightly Billing job due to an issue with the length of the Place of Service value |

### Core Bugs # 132145: ‘Allowed Amount Adjustment' column field was not defaulted from the template plan if not specified.

**What’s fixed:** The **Allowed Amount Adjustment** field was not defaulting from the template plan when the **Client Coverage Plan** was not configured with the **On Charge Creation** option. As a result, the adjustment job failed to apply default values, leaving charge balances unadjusted.

The system now correctly defaults to values from the template plan during the **Allowed Amount Adjustment job**, even when On Charge Creation is not selected in the client plan.

**Where to find it:**

- **Plan Setup:**
  Go to **Administration** → **Billing Setup** → **Plans** → Select or create a plan → **Plan Details** screen → **Payments and Adjustments** tab.
- **Client Plan Association:**
  Go to **Client search** → **Finance** → **Coverage** → Add a new plan → Set **Start Date** and **COB Order** → Confirm plan appears in **Plans Time Span**.
- **Charge Creation:**
  Go to **Client search** → **Services** → Create and complete a service → Click **Charge** → **Ledger Entries** → Click **Charge ID** → **Charge Details** → **General** tab → Financial **Information** section.

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### Core Bugs # 132234: Adjustments in 835 process calculate rounding fix incorrectly

**What’s fixed:** Previously, when processing an 835 file containing both primary and secondary charge payments (with CLP02 = 2), the system incorrectly calculated and applied rounding adjustments. This caused inaccurate payment and transfer distributions across services grouped under the same claimLineItemGroupID.

The system now correctly applies the total payment and adjustment amounts to **primary services**, and the total transfer amounts to secondary services, ensuring accurate financial posting.

**Pre-requisites:**

- Process an 835 file with both primary and secondary charge payments
- Multiple primary services grouped under the same claimLineItemGroupID

**Where to find it:**
My Office → Payments/Adjustments → Electronic Remittance

- Click on **Import File ID** → Electronic Remittance File Details pop-up
- Click **Process File** → Save → Close
- Review **Ledger Screen** for each service in the claim line group → Confirm correct payment, adjustment, and transfer amounts

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### Core Bugs # 132548: Qualifying CCBHC Services not in Batch error not generating if one of the qualifying services has a Claims Generation Error

**What's fixed**:

Previously, during 837 Professional claim generation for clients with a CCBHC coverage plan, if one of the component services encountered a claims generation error, the system still billed other qualifying CCBHC services. This led to inconsistent claim batches and missing error messages.

The system now correctly prevents billing of all qualifying CCBHC services if any component service has a charge error. A specific error message is displayed:

"Qualify CCBHC service not in this batch"

**Pre-requisites:**

- Client must be associated with a CCBHC coverage plan
- Component services must be created

**Where to find it:**

1. **Client Search → Select Client with CCBHC Coverage Plan**
   - Administration → Procedure/Rates → Add-on Codes tab → Select procedure
   - Client → Services → Complete the service
2. **My Office → Charges and Claims**
   - Select Charges → Click **Electronic Claim** → Claims Processing pop-up → Click **Process Now**
   - Review error message for services with claim generation issues

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### Core Bugs # 132578: Decimal Claim unit values are rounded off to integer

**What's fixed:** Previously, when users opened the **Electronic Remittance** pop-up screen from the Payments/Adjustments section, the **Payer** field incorrectly defaulted to Commercial instead of Select Electronic Remittance sender.

The **Payer** field correctly defaults to **Select Electronic Remittance sender** when the pop-up screen is accessed.

**Where to find it:**
**Go Search** → Enter/Select **Payments/Adjustments (My Office)** → Click **Electronic Remittance** icon → View **Electronic Remittance** pop-up screen

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### Core Bugs # 132589: Decimal Claim unit values are rounded off to integer

**What's fixed:** Previously, when processing claims, **decimal charge unit** values were incorrectly rounded to whole numbers. Specifically:

- Units between **0.1 and 0.5** were rounded down to **0**, triggering a billing error.
- Units between **0.5 and 0.9** were rounded up to **1**, leading to inaccurate billing.

This caused the following error message:
**"Zero Claim units. Please check Procedure Rate/Billing Codes."**

With this release, the system now retains **decimal charge units as entered**, ensuring accurate billing. Services with units between **0.1 and 0.9** are processed correctly, and the zero-unit error no longer appears.

**Where to find it:**
**My Office** → **Billing** → **Charges/Claims** → Select a claim → Click **E-claim** → Click **Process Now** → Create Claim File

### Core Bugs # 132824: The 'Allowed Amount Adjustments' job step encountered a failure during the Nightly Billing job due to an issue with the length of the Place of Service value

**What's fixed:** The **Allowed Amount Adjustments job** step in the **Nightly Billing** process was failing due to a string length issue with the **Place of Service** value. Specifically, if the **External Code 1** value under the **PLACEOFSERVICE** global code category exceeded two characters, the job step would fail with a truncation error.

The system now supports **External Code 1** values up to 25 characters under the **PLACEOFSERVICE** category. The job step executes successfully even when longer Place of Service values are used.

**Pre-requisite:**

- Update the **External Code 1** value of the **PLACEOFSERVICE** global code category to more than 2 characters
- Select the **Place of Service** under the **General Information** section of the **Location** tab in the **Location Details** screen

**Where to find it:**
N/A (automated job step in Nightly Billing)

## Client Clinical Problems

| Reference No | Task No | Description |
|---|---|---|
| 22 | Core Bugs # 132501 | 'Problem Details' diagnoses were not being saved to the 'Most Common Problems' dropdown |

### Core Bugs # 132501: 'Problem Details' diagnoses were not being saved to the 'Most Common Problems' dropdown

**What's fixed:** Previously, when users selected a diagnosis in the **Problem Details** screen and checked the **Include in Common List** box, the selected diagnosis was not being saved to the **Most Common Problems** dropdown, even after saving the record.

The system now correctly saves diagnoses marked as favorites using the Include in Common List checkbox, and they are displayed in the **Most Common Problems** dropdown.

**Where to find it:**

Client → Problem Detail screen

- Search and select a diagnosis
- Check **Include** in **Common List**
- Select **Type of Problem** → Click **Insert** → Click **Save**
- Confirm diagnosis appears in **Most Common Problems** dropdown

# Client Education Resource

| Reference No | Task No | Description |
|---|---|---|
| 23 | Core Bugs # 130636 | Issues in the 'Client Education Resources' screen. |

### Core Bugs # 130636: Issues in the 'Client Education Resources' screen.

**What's fixed:** Two issues were resolved in the **Client Education Resource** screen:

Clicking the last page number previously showed a blank page. Now, all records are displayed on a single scrollable page.

The pop-up header for **Document Description** was incorrectly labeled as **"Custome Report Viewer."** It has been corrected to **"Custom Report Viewer."**

**Where to find it:**
Go to **Client search** → **Client Education Resource** screen → Click on **Document Description** hyperlink → **Custom Report Viewer popup** will appear.

# Client Information

| Reference No | Task No | Description |
|---|---|---|
| 25 | Core Bugs # 132557 | 'Address Type 0' entries in tables 'ClientAddresses' and 'ClientAddressHistory' being generated as Bad Data. |
| 26 | Core Bugs # 132601 | Client Information (Admin): in the 'Contacts' tab, the phone numbers are not appearing |
| 27 | Core Bugs # 132684 | Incorrect Screen Name Displayed After Navigating from 'My Documents (My Office)' via Client Search |
| 28 | Core Bugs # 132789 | The word "Old" is added after the 'MM/DD/YYYY <years/months>' format in the 'Date of Birth' field of Client information tooltip |
| 29 | Core Bugs # 132736 | Client Information C screen: Irrelevant validation message is displayed when user tries to insert records into 'List Of Releases' grid |

### Core Bugs # 132557: 'Address Type 0' entries in tables 'ClientAddresses' and 'ClientAddressHistory' being generated as Bad Data.

**What's fixed:** Bad data entries were being generated in the **Address Type 0 column** of the **ClientAddresses** and **ClientAddressHistory tables** when users added or deleted a client's address from the **Client Information (C)** screen.

The system now prevents the creation of invalid entries in the **Address Type 0** column during address updates. Additionally, a cleanup script has been provided to mark existing bad records as deleted (Record Deleted = 'Y').

**Where to find it:**

1. **Client search** → **Client Information (C)** → **Add/Delete address** in **General tab**

2. **Database** → **ClientAddresses** and **ClientAddressHistory tables** → Check entries under **Address Type 0**

---

### Core Bugs # 132601: Client Information (Admin): in the ‘Contacts’ tab, the phone numbers are not appearing

**What’s fixed:** In the SmartCare application, the **‘Contacts’** tab on the **Client Information (Admin)** screen was not displaying phone numbers, even though the data existed. This created a gap in visibility for client contact details.

Phone numbers now appear correctly in the **‘Contacts’** tab, ensuring users have access to complete client contact information.

**Where to find it:**
Go to **Client Information (Admin)** → Open the **Contacts** tab → Verify that phone numbers are now visible.

---

### Core Bugs # 132684: Incorrect Screen Name Displayed After Navigating from ‘My Documents (My Office)’ via Client Search

**What’s fixed:** Previously, when **My Documents (My Office)** was set as the homepage, navigating to the **Client Information** screen—either by creating a new client or selecting one from the **Client Search** popup—did not update the screen name correctly. The top of the screen continued to display **My Documents**, causing confusion about the current view.

The screen name now correctly updates to **Client Information** when navigating from **My Documents (My Office)** via **Client Search**.

**Where to find it:**

1. Set **My Documents (My Office)** as homepage in **My Preferences (My Office)**
2. Navigate to:
   - **Client Search** → Create or select a client → View screen name at the top

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### Core Bugs # 132789: The word "Old" is added after the 'MM/DD/YYYY <years/months>' format in the 'Date of Birth' field of Client information tooltip

**What’s fixed:** In the **Client Information tooltip**, the **Date of Birth** field did not include the word **“Old”** after the formatted date and age (e.g., MM/DD/YYYY <years/months> or MM/DD/YYYY <days/months>), which could lead to unclear age representation.

The system now appends the word **“Old”** after the age format in the **Date of Birth** field, improving clarity in client age display.

**Where to find it:**
**Client** → **Search** → **Select Client** → Hover over **Client Information tooltip** → View **Date of Birth** field

---

### Core Bugs # 132736: Client Information C screen: Irrelevant validation message is displayed when user tries to insert records into ‘List Of Releases' grid

**What’s fixed:** An irrelevant validation message was being displayed when users attempted to insert records into the **List of Releases** grid on the **Client Information C** screen, even after entering valid data in the **Release To** field.

The validation message no longer appears when the **Release To** field is properly filled, and users can insert records into the grid without interruption.

**Pre-requisite:**
Ensure the Client Information C screen is configured and accessible.

**Where to find it:**
**Client** → **Client Information C** → **Release of Information** tab

# Client MAR

| Reference No | Task No | Description |
|---|---|---|
| 30 | Core Bugs # 132559 | The ‘Admin in Last 24 Hours’ field is updated with the dose value in the ‘Client MAR’ screen when the Medication is administered with statuses such as ‘Refuse’, ‘Not Given’, or ‘Initial Refusal - Not Given’. |
| 31 | Core Bugs # 132728 | Client Order Details: Error on clicking History of Administration tab |
| 32 | Core Bugs # 132848 | Client MAR and Group MAR: Any changes to the dispense time will always create additional MAR records, and not remove the original dispense time. |

### Core Bugs # 132559: The ‘Admin in Last 24 Hours’ field is updated with the dose value in the ‘Client MAR’ screen when the Medication is administered with statuses such as ‘Refuse’, ‘Not Given’, or ‘Initial Refusal - Not Given’.

**What’s fixed:** Previously, in the Client MAR screen, the **‘Admin in Last 24 Hours’** field was incorrectly updated with the dose value when a medication was administered with statuses like **‘Refuse’, ‘Not Given’,** or **‘Initial Refusal - Not Given’**. This led to inaccurate tracking of administered doses.

The system now correctly prevents dose values from updating the **‘Admin in Last 24 Hours’** field when these specific statuses are selected.

**Where to find it:**

1. **Administration** → Orders → Orders list → New → Order Details → Select Order Type → Fill required fields → Options → Set “Add Order to MAR” to Yes → Save
2. **Client** → Client Orders → New → Select Order from step 1 → Fill required fields → Set “Max Quantity Allowed in 24 Hours” → Insert → Save → Sign
3. **Client** → Client MAR → Select client → Click date hyperlink → Set Administration Status to “Refused” → Save

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### Core Bugs # 132728: Client Order Details: Error on clicking History of Administration tab

**What’s fixed**: In the **Client Orders Details** screen, clicking the **History of Administration** tab triggered a red error message:

**Error message**:
8114*****Error converting data type varchar to float.*****ssp_SCClientOrderAdministration*****23*****16*****5

Users can now access the **History of Administration** tab without encountering any errors.

**Where to find it:**
Select a client → **Search** → **Client Orders** → Click **Medication Name** hyperlink → **Client Orders Details** screen → **History of Administration** tab

## Core Bugs # 132848: Client MAR and Group MAR: Any changes to the dispense time will always create additional MAR records, and not remove the original dispense time.

**What's fixed**: Previously, when users modified the dispense time in the **Client MAR** or **Group MAR** screens, the system created duplicate MAR records—one with the original time and one with the updated time—leading to confusion and cluttered records.

The system now correctly updates the dispense time without creating additional MAR records.

**Pre-requisite:**
Client Orders must be signed with **Frequency** set to Use Start Time of Order as First Dispense Time.

**Where to find it:**

- **Client → Client MAR**
- **My Office → Group MAR**
  → Modify dispense time → Confirm only updated MAR record is retained

# Client Orders

| Reference No | Task No | Description |
|---|---|---|
| 37 | Core Bugs # 132583 | 'Clinic/Location' selected from the drop-down in the 'Order' tab is not correctly displayed in the 'Preference' tab of the 'Client Orders Details' screen. |
| 38 | Core Bugs # 132791 | Laboratory Details Fetching Logic Changes |
| 39 | Core Bugs # 132799 | Service Not Being Created from Lab Order |
| 40 | Core Bugs # 132802 | MAT: Received an Error on MAT Management when attempting to create an order. |
| 41 | Core Bugs # 132826 | Client Order PDF: Medication Instructions incorrectly showing on the Medication row |
| 42 | Core Bugs # 132857 | lab results with wrong client information in the Lab Result PDF in the SmartCare |

## Core Bugs # 132583: 'Clinic/Location' selected from the drop-down in the 'Order' tab is not correctly displayed in the 'Preference' tab of the 'Client Orders Details' screen.

**What's fixed:** Previously, when users selected a **Clinic/Location** from the dropdown in the **Order** tab of the Client Orders Details screen, the selected value was not correctly reflected in the **Preference** tab. This caused inconsistencies when reviewing lab orders.

The **Clinic/Location** selected in the **Order** tab now correctly displays in the **Preference** tab, ensuring accurate and consistent data across tabs.

**Where to find it:**
**Client** → Search and select a client → Go to **Client Orders** → Click **New** → In **Order** tab:

- Select required **Lab Order**
- Choose **Clinic/Location** from dropdown
- Check **Preference** checkbox
- Click **Insert** and **Save**
  → Navigate to **Preference** tab → Select checkbox for same **Lab Order**

### Core Bugs # 132791: Laboratory Details Fetching Logic Changes

**What's fixed:** The logic used to fetch **Laboratory Details** when processing lab results from **ORU HL7 inbound messages** was previously limited to mapping the **Receiving Facility** value in MSH.6 from the XML to vendor configuration details. This caused issues in accurately identifying the correct laboratory. The system now uses multiple mapping conditions to fetch laboratory details more reliably:

- Laboratories.vendorID ↔ HL7CPQueueMessages.CPVendorConnectorID
- HL7CPVendorConfigurations.SendingFacility ↔ Receiving Facility value in MSH.6
- Laboratories.LaboratoryId ↔ LaboratoryFacilities.LaboratoryId

**Where to find it:**

- Select a **Client** → **Go Search** → **Client Orders** → **Client Order Details** → **Lab Results and Attachments**
- **Administration** → **Messages Interface** → **Messages Interface Detail**
- **Client** → **Lab Result Review** → **View**

## Core Bugs # 132799: Service Not Being Created from Lab Order

**What's fixed:** Services were not being created from **Lab Orders** when the procedure category was set to **Encounters** or **Days**, and the order start date and end date were the same.

Services are now successfully created with a duration of 1 unit when signing a client order that has the same start and end date.

**Pre-requisite:**

- Client must be enrolled in a Program and Procedure
- Procedure must be a billable procedure code
- Procedure category must be set to Encounters or Days

**Where to find it:**

- **Client** → **Client Orders** → Search and select a **Lab Order** → Enter required fields → Set **Order Status** to **'Sent to Lab'** → Click **'Insert'** → Click **'Save/Sign'**
- **Client** → **Services** → Open the created **Service**

## Core Bugs # 132802: MAT: Received an Error on MAT Management when attempting to create an order.

**What's fixed:** Previously, users received a red error message when attempting to create a MAT Client Order and add a schedule in the MAT Client Level pop-up. This occurred during the dataset merge process, preventing successful order creation.

The system now allows users to create MAT Client Orders and add schedules without encountering the error message.

**Error message before fix:**
"Error occurred during dataset merge process at server side, please contact system administrator for further assistance."

**Where to find it:**

1. **Administration** → **Orders** → **Orders list page**
    - Click on **New** → Order Details screen
    - Select **Medication** Order Type
    - Fill required fields
    - Under **Medication Assisted Treatment**, set:
        - Medication Assisted Treatment = Yes
        - Machine Connection Required = Yes
        - Take Home Allowed = Yes
        - Display Program = Yes
    - Click **Save**
2. **Client** → **Search** → **Client Orders** → **Client Orders list page**
    - Click on **New** → Client Order Details screen
    - Select the Order created in step 1
    - Fill required fields
    - Select Take Home Days and Program
    - Click **Insert**, then **Save** and **Sign Client Order**

### Core Bugs # 132826: Client Order PDF: Medication Instructions incorrectly showing on the Medication row

**What's fixed:** Medication instructions were incorrectly appearing within the medication row in the Client Order PDF. Additionally, the medication name format was incorrect, and the Dose field was missing.

The system now correctly displays the medication name format and includes the Dose field in the Client Order PDF. The display logic has been updated as follows:

- **If Strength ≠ 'Other'**: (Order Name) + Medication Description (from MDMedications table)
- **If Strength = 'Other'**: (Order Name) + Medication Name

**Where to find it:**
**Client** → **Client Orders** → Select **Medication Order** → Fill required fields → **Sign**

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### Core Bugs # 132857: lab results with wrong client information in the Lab Result PDF in the SmartCare

**What's fixed:** Lab results were displaying **incorrect client information** in the **Lab Result PDF** within SmartCare. This occurred when multiple lab results were received with the **same MessageControlId** in ORU HL7 inbound messages.

The system now checks whether the MessageControlId already exists in the **HL7CPQueueMessages** table:

- If it does not exist, a new record is inserted.
- If it does exist, the system processes the existing record and displays the correct client information in the Lab Result PDF.

**Where to find it:**

- **Administration** → **Messages Interface** → **Messages Interface Detail**
- **Client** → **Client Orders** → **Client Order Details** → **Lab Results and Attachments**
- **Client** → **Lab Result Review** → **View**

# Client Search

| Reference No | Task No | Description |
|---|---|---|
| 43 | Core Bugs # 132236 | To disable the barcode scanning functionality, a new System Configuration Key "EnableBarcodeScanning" is implemented. |

### Core Bugs # 132236: To disable the barcode scanning functionality, a new System Configuration Key "EnableBarcodeScanning" is implemented.

**What's fixed:** Previously, when users typed or searched for a Client ID too quickly, the system mistakenly triggered barcode scanning logic, causing valid client records to not be found.

A new system configuration key, **EnableBarcodeScanning**, has been introduced to prevent this issue. When this key is turned off, barcode scanning functionality is disabled, ensuring that rapid typing or multiple key presses do not activate barcode scanning.

**Where to find it:**
Client Search → Type or search for Client ID → Confirm barcode scanning is disabled when configuration key is set to **No**

**System Configuration Key Details:**

- **Key Name**: EnableBarcodeScanning
- **Read As**: Enable Barcode Scanning
- **Allowed Values**: Yes / No
- **Behavior**:
    - **Yes** (default): Barcode scanning is enabled
    - **No**: Barcode scanning is disabled
    - Any other value or missing key: Defaults to **Yes**

**Pre-requisites:**

Set **EnableBarcodeScanning** = No in System Configuration

# Clinical Data Access Groups

| Reference No | Task No | Description |
|---|---|---|
| 44 | Core Bugs # 132213 | Selected Program was getting cleared upon Refreshing the Browser |

### Core Bugs # 132213: Selected Program was getting cleared upon Refreshing the Browser

**What's fixed**: Previously, when users refreshed the browser while creating a new document, the selected program in the Document Control section was cleared, requiring re-selection and disrupting workflow.

The system now retains the selected program even after a browser refresh, ensuring a smoother and more consistent document creation experience.

**Pre-requisites:**

- System configuration key **DisplayCDAGSectionInStaffDetails** = Yes
- System configuration key **EnableClinicalDataAccessGrouping** = Yes

**Where to find it:**
**Client Search → Documents → Create New Document**

- Program Selection pop-up → Select Program

- Ensure document is in **New** status
- Refresh browser → Expand Document Control (+) → Confirm selected Program remains intact

# Core Assessment

| Reference No | Task No | Description |
|---|---|---|
| ~~49~~ | ~~Core Bugs # 132792~~ | ~~Assessment (C) : Error: Sub report could not be shown~~ |
| ~~50~~ | ~~Core Bugs # 132852~~ | ~~Assessment ( C ): When the document is saved in the CATS tab and then navigated to the Needs tab, blank screen is displayed~~ |

### ~~Core Bugs # 132792: Assessment (C) : Error: Sub report could not be shown~~

~~**What's fixed:** An error occurred in the **Assessment (C)** screen when special characters were added to the **DFA form name** mapped to a **Core Assessment**. The system displayed the following error:~~

~~**Error Message:**~~
~~Error: Subreport could not be shown.~~

~~Users can now include special characters in the **DFA form name** without triggering errors, and the **Mental Status** tab loads correctly.~~

~~**Where to find it:**~~
~~**Client** → **Assessment (C)** → Select **Classification, Population, Category, Type** → **View Mental Status** tab~~

---

### ~~Core Bugs # 132852: Assessment ( C ): When the document is saved in the CATS tab and then navigated to the Needs tab, blank screen is displayed~~

~~**What's fixed:** Previously, when users saved a document in the **CATS** tab of the **Assessment (C)** screen and then navigated to the **Needs** tab, the screen appeared blank, preventing further interaction.~~

~~The system now correctly displays the **Needs** tab after saving data in the **CATS 3–6** and **CATS 7–17** tabs, allowing users to continue their workflow without interruption.~~

~~**Where to find it:**~~
~~**Client** → **Assessment (C) (Client)** → Select **Classification, Population, Category, Type** → **Access CATS 3–6** and **CATS 7–17** tabs → Save document → Navigate to **Needs** tab → Confirm tab displays correctly~~

# Crisis Call Log

| Reference No | Task No | Description |
|---|---|---|
| 51 | Core Bugs # 132696 | Crisis Call Log list Page: Duplicate records were displayed. |
| 52 | Core Bugs # 132721 | Crisis Call Log Details screen: Treatment team member was blank in the Client Information (Potential) section |

### Core Bugs # 132696: Crisis Call Log list Page: Duplicate records were displayed.

**What's fixed:** Previously, when users created multiple records in the **Follow Up** tab of the **Crisis Call Log Details** screen, duplicate entries appeared on the **Crisis Call Log List** page after saving. This caused confusion and clutter in the log view.

The **Crisis Call Log List** page now displays only the **most recent Follow Up record**, even when multiple entries are created, eliminating duplicate records and improving clarity.

**Where to find it:**
**Client Search** → Select client → **Crisis Call Log (My Office)** → View **Crisis Call Log List** page

### Core Bugs # 132721: Crisis Call Log Details screen: Treatment team member was blank in the Client Information (Potential) section

**What's fixed**: In the **Crisis Call Log Details** screen, the **Treatment Team Member** field in the **Client Information (Potential)** section was appearing blank, even when relevant data existed.

The system now correctly initializes the **Treatment Team Member** field using data from the following sources:

1. Primary Clinician and Primary Physician from the **Client Information** screen
2. Assigned Staff from the **Program Assignment** screen
3. Staff associated in the **Treatment Episode** screen
4. Family Name and Foster Care Specialist from the **Placement History Details** screen
5. Clinician and Physician from the **Inpatient Activity Details** screen

**Where to find it:**
**Crisis Call Log (My Office)** → Click **New** → **Crisis Call Log Details** screen → View **Client Information (Potential)** section

# Dashboard

| Reference No | Task No | Description |
|---|---|---|
| 53 | Core Bugs # 132628 | Widget column headers showing attribute name instead of display as Value |
| 54 | Core Bugs # 132718 | Tracking Widget Radio Buttons Not Working Properly |

### Core Bugs # 132628: Widget column headers showing attribute name instead of display as Value

**What's fixed**: On the **Client Dashboard**, widget column headers were showing the default **Attribute Name** instead of the custom label entered in the **Display As** field.

Column headers now correctly display the custom **Display As** value set during widget creation.

**Where to find it:**
Select a client → Open the **Client Dashboard** → Review widget column headers.

### Core Bugs # 132718: Tracking Widget Radio Buttons Not Working Properly

**What's fixed:** In the **Tracking** Widget, selecting a radio button would correctly update the grid, but the selection would reset to the wrong option. This issue occurred only when the **"Service Requests for Review/Approval"** widget was placed before the **Tracking Widget** on the dashboard. The radio button selection in the Tracking Widget remains accurate, regardless of the placement of other widgets.

**Where to find it:**
**Go Search → Dashboard (My Office) → Tracking Widget**

## Documents

| Reference No | Task No | Description |
|---|---|---|
| 60 | Core Bugs # 132537 | Documents: Reviewer Co-signer issue. |
| 61 | Core Bugs # 132547 | Inactive staff were displayed in Acknowledgements and Comments section for "To Acknowledge" status. |
| 62 | Core Bugs # 132581 | PHQ-9 and PHQ-A document – 'Addition Questions' section still displays even if the system configuration is turned off. |
| 63 | Core Bugs # 132677 | The 'Remain open' programs are not displayed in the PDF of the 3rd and 4th versions of the 'Agency/Program Discharge' document. |
| 64 | Core Bugs # 132724 | All the Documents are not listed in 'Attach/Review Documents' and 'Associate Documents' popups. |
| 65 | Core Bugs # 132759 | When staff tried to add client to cosign, wrong staff name was populating in the cosigner list. |

### Core Bugs # 132537: Documents: Reviewer Co-signer issue.

**What's fixed**: The **Reviewer Co-signer** functionality was not working as intended in the **Documents** module. Reviewers were able to select themselves from the **Co-signer list** and sign the document even before the original author had signed it.

Reviewers can no longer select themselves as co-signers for the current version of the document. A document can only be co-signed **after** it has been signed by the original author.

**Pre-requisite:**

In **Document Codes Setup**, ensure **Requires Licensed Signature** is set to **Yes**

**Where to find it:**
**Client → Documents → Sign → Add Reviewer → Status: To Be Reviewed → Login as Reviewer → Documents → Decline Document → Status: In Progress →** Select **Reviewer from Co-sign** list

### Core Bugs # 132547: Inactive staff were displayed in Acknowledgements and Comments section for "To Acknowledge" status.

**What's fixed:** Previously, inactive staff members were still appearing in the **Acknowledgements** and **Comments** section of documents with the **"To Acknowledge"** status, even after being inactivated by an admin.

The system now correctly excludes inactive staff from the "To Acknowledge" list in the Acknowledgements and Comments section.

**Pre-requisites:**

- Document Codes setup:
    - **Enable Document Acknowledgement** = Yes
    - Either **Default Staff To Acknowledge** or **Default Role To Acknowledge** is configured
- Active staff exists for the configured role or staff

**Where to find it:**

1. **SmartCare → Client → Documents**
    - Select a document with the above pre-requisites
    - Fill in details → Sign the document
    - Click Document Control → Acknowledgements and Comments → Confirm staff listed under "To Acknowledge"
2. **Admin login**
    - Inactivate one of the staff listed in the Acknowledgements and Comments section
3. **Re-login as normal user**
    - Select same client and document
    - Click **Document Control** → Acknowledgements and Comments → Confirm inactivated staff no longer appear

---

### Core Bugs # 132581: PHQ-9 and PHQ-A document – 'Addition Questions' section still displays even if the system configuration is turned off.

**What's fixed:** Previously, the **Additional Questions** section continued to display in the **PHQ-9** and **PHQ-A** documents even when the system configuration keys were set to No. This caused confusion for users expecting the section to be hidden.

When the configuration keys are set to **No**, the **Additional Questions** section no longer appears in either document, as expected.

**Where to find it:**

1. Set configuration key ShowAdditionalQuestionSectionOnCorePHQ9Document to **No**
2. Set configuration key ShowAdditionalQuestionsSectionOnCorePHQADocument to **No**
3. Navigate to:
    - **SmartCare → Client → Documents → PHQ-9 document**
    - **SmartCare → Client → Documents → PHQ-A document**

---

### Core Bugs # 132677: The 'Remain open' programs are not displayed in the PDF of the 3rd and 4th versions of the 'Agency/Program Discharge' document.

**What's fixed:** Previously, in the **Agency/Program Discharge** document (versions 3 and 4), the **Remain Open** programs were not displayed in the generated PDF. Only the discharged programs appeared, leading to incomplete documentation of the client's active program status.

The PDF now correctly displays both **Discharged** and **Remain Open** programs in the 3rd and 4th versions of the document, ensuring a complete and accurate representation of the client's program enrollment.

**Where to find it:**
**Client** → **Agency/Program Discharge** → Click **New** → Select **Program Discharge** radio button → Enter required dates → Click **Save/Validate/Sign** → Click **Sign**
→ PDF displays → Click **Edit** → Second version appears → Discharge one program → Click **Sign**
→ Click **Edit** → Third version appears → Edit/select required data → Click **Sign**

### Core Bugs # 132724: All the Documents are not listed in 'Attach/Review Documents' and 'Associate Documents' popups.

**What's fixed:** Previously, not all documents were displayed in the **'Attach/Review Documents'** and **'Associate Documents' popups**, even when they should have been available. All relevant documents are now correctly listed in both popups.

**Pre-requisite:**

- System configuration key **DisplayCDAGSectionInStaffDetails** must be set to **Yes**
- System configuration key **EnableClinicalDataAccessGrouping** must be set to **Yes**

**Where to find it:**

- **Client** → **Documents** → **Documents list pag**e → Click '**Add**' under **Associated Documents** → **Associate Documents popup**
- **My Office** → **My Documents** → **My Documents list page** → Click **'Add'** under **Associated Documents** → **Associate Documents popup**
- **Client** → **Disclosure/Requests** → **Disclosure/Requests list page** → Click **'New'** → **Disclosure/Requests Details** → **Disclosure Details** section → Click **'Attach / Review Items Disclosed'** → **Attach / Review Documents popup**
- **Client** → **Service Request** List → **Service Request List** page → Click **'New'** → **Service Request – Review/Approval Detail** → **Attachments** tab → Click **'Attach Documents'** → **Attach / Review Documents popup**

### Core Bugs # 132759: When staff tried to add client to cosign, wrong staff name was populating in the cosigner list.

**What's fixed:** When staff attempted to add a **client as a co-signer** in a document, the system incorrectly populated a **staff name** in the co-signer list instead of the correct client name.

The correct **client name** is now displayed in the **co-signer list** when adding a client as a co-signer in a document.

**Where to find it:**
**Client** → **Documents**

# Dynamic Forms (DFA)

| Reference No | Task No | Description |
|---|---|---|
| 67 | Core Bugs # 132542 | The label-type Form Item in the 'Custom' tab did not display the ID value (ID field appeared blank). |

| | | |
|---|---|---|
| 68 | Core Bugs # 132555 | BQuIP - SUD Screening document radio button display issue. |

### Core Bugs # 132542: The label-type Form Item in the 'Custom' tab did not display the ID value (ID field appeared blank).

**What's fixed:** Previously, label-type **Form Items** in the **Custom** tab of documents did not display their **ID values** when inspected using Developer Tools. The ID field appeared blank, making it difficult to identify or reference the control programmatically.

The system now correctly displays the **ID value** for label-type Form Items in the Custom tab, ensuring visibility and traceability during inspection.

**Where to find it:**
Client Search → Documents → Open any document with a **Custom** tab → Locate a label-type Form Item → Inspect using Developer Tools → Confirm ID value is visible

---

### Core Bugs # 132555: BQuIP - SUD Screening document radio button display issue.

**What's fixed:** Previously, in the **BQuIP - SUD Screening** document, radio button labels were incorrectly displayed below the radio buttons instead of beside them, affecting readability and layout.

The system now correctly displays radio button labels next to the buttons, as intended.

**Note:** This is a customer-specific issue fix.

**Where to find it:**
Client → BQuIP - SUD Screening document → Review radio button layout

# Error Log

| Reference No | Task No | Description |
|---|---|---|
| 69 | Core Bugs # 132646 | Documents: Errorlog issue |
| 70 | Core Bugs # 132665 | Errorlog was getting logged when a user attempted to login to SmartCare application |

### Core Bugs # 132646: Documents: Errorlog issue

**What's fixed:** An error was being logged when users accessed **Keyboard Shortcuts** from the menu or attempted to **print an InProgress document**. The system recorded the following error in the **ErrorLog** table:

**Error Message:**
Exception: The remote host closed the connection.

Users can now access **Keyboard Shortcuts** and print **InProgress** documents without triggering any error logs.

**Where to find it:**

- Click **staff name** (top-right corner) → **Select Keyboard Shortcuts**
- **Client** → **Documents** → **Create a new document** → **Save** → Ensure status is **InProgress**

---

### Core Bugs # 132665: Errorlog was getting logged when a user attempted to login to SmartCare application

**What's fixed**: An error was being logged when users attempted to **log in to the SmartCare application**. The system recorded the following error in the **ErrorLog** table:

**Error Message:**
The remote host closed the connection

Users can now log in to SmartCare without triggering any error logs.

**Where to find it:**
Login to SmartCare application

# Flow Sheet

| Reference No | Task No | Description |
|---|---|---|
| 71 | Core Bugs # 132692 | Flow sheet List Page: Health Data element description name does not fit in the column |

### Core Bugs # 132692: Flow sheet List Page: Health Data element description name does not fit in the column

**What's fixed:** In the **Flow Sheet List** page, long **Health Data Element Descriptions** were not fitting properly in the column, causing misalignment in the **Vitals History** tab.

Descriptions now display correctly within the column without layout issues.

**Where to find it:**
**Client** → **Flow Sheet** → **Vitals History** tab → Verify Health Data Element Descriptions display properly.

# Group Services

| Reference No | Task No | Description |
|---|---|---|
| 73 | Core Bugs # 132595 | When services are created from 'Group Services', the 'Client was Present' checkbox appears checked on the 'Service Detail' screen. |
| 74 | Core Bugs # 132705 | Recurring Group Services have old diagnosis attached to recurring services and do not update when diagnosis is updated. |
| 75 | Core Bugs # 132715 | Groups: Duplicate services are created for the client. |
| 76 | Core Bugs # 132820 | Getting an error message when trying to open services from the 'Document To Do' widget. |
| 77 | Core Bugs # 132876 | Group Services – Mode of Delivery issues. |

### Core Bugs # 132595: When services are created from 'Group Services', the 'Client was Present' checkbox appears checked on the 'Service Detail' screen.

**What's fixed**:
When services were created from **Group Services**, the **Client Was Present** checkbox appeared checked on the **Service Detail** screen—even though the actual data value was null. This caused inaccurate representation of client attendance.

This issue has been resolved. The checkbox now appears unchecked by default, accurately reflecting the underlying data.

**Where to find it:**

**Group Service Creation:**
Go to **My Office** → **Groups** → Click **New** → Fill in required fields in the **General** tab → **Save** → Go to **Schedule** tab → Click **New Group Service** → Select **Date of Service** and **Clients** → Click **Select**.

**Service Finalization:**
Navigate to **Group Service Detail** → **Group Details** tab → Fill in **Service Information** → **Save** → Go to **Note** tab → Enter required fields → **Save** → Click **Sign** → View **PDF**.

**Service Detail Verification:**
Go to **My Office** → **Services** → Locate the created service → Click on **DOS** hyperlink → Verify **Client Was Present** checkbox on the **Service Detail** screen.

## Core Bugs # 132705: Recurring Group Services have old diagnosis attached to recurring services and do not update when diagnosis is updated.

**What's fixed:** Recurring **Group Services** were retaining outdated diagnosis information. Updates to a client's diagnosis were not reflected in future recurring service instances.

Diagnosis is now dynamically populated when:

- Service status is changed to **Show**
- **Date of Service** is modified
- **Program** is changed
- **Refresh Diagnosis** is clicked

**Where to find it:**

- Create a recurring group service via **Groups** → **Schedule** → **New Group Service**
- Update diagnosis via **Client** → **Diagnosis Document**
- View and refresh diagnosis via **Group Services** → **Service Detail** → **Billing Diagnosis** tab

## Core Bugs # 132715: Groups: Duplicate services are created for the client.

**What's fixed:** Previously, when a user deleted and re-added a client after creating a recurring group service, the system would generate duplicate services for that client.

Clients can be deleted and re-added without triggering duplicate service creation in recurring group services.

**Pre-requisite:**
Create a recurring group service, then delete and re-add a client within the group.

**Where to find it:**
**My Office** → **Groups**

1. Go to the **Groups** list page
2. Select a group and click the **Save** icon
3. Navigate to the **Schedule** tab → Click **New Group Service**
4. In the **Group Service Client** popup, select a client → Click **Select**
5. On the **Group Service Detail** page → Go to **Services** tab → Enter/select data → Click **Save**
6. Go to **Group Details** tab → Click **Make Recurring** → Select recurrence details → Click **OK**
7. Delete the client → Click **Save**
8. In the **Group Service Recurrences Scheduler** popup → Click **Cancel**
9. Re-add the previously deleted client → Click **Save**
10. In the **scheduler** popup → Select recurrence details → Click **OK**
11. Return to the **Schedule** tab → Click the group's **Date** hyperlink
12. On the **Group Service Detail** page → Go to **Services** tab → Select the client

### Core Bugs # 132820: Getting an error message when trying to open services from the 'Document To Do' widget.

**What's fixed:** Users were encountering an error when trying to open services from the **Document To Do** widget. This occurred because some documents were still listed even after their associated recurring group services had been deleted.

The system now includes defensive logic to automatically remove documents linked to deleted recurring group services, preventing the error from occurring.

**Error Message Previously Displayed:**
"TypeError: Cannot read properties of null (reading 'ObjectDocumentInformation')"

**Where to find it:**

1. **My Office** → **Dashboard** → **Document To Do widget**
2. **My Office** → **Groups** → **Groups List** → **New** → Fill **General** tab → **Save** → **Schedule** tab → **New Group Service** → Select **Date of Service and Clients** → **Select**
3. **Group Service Details** → **Group** tab → **Group Details** tab → **Staff** section → Fill required fields → **Recurrence icon** → **Recurring Group Services popup** → **Select dates** and **recurrence pattern** → **Create Immediately** → **OK**

### Core Bugs # 132876: Group Services – Mode of Delivery issues.

**What's fixed**: The **Mode of Delivery** field in **Group Services** was not properly validated. If the field was left unselected, users could still proceed with actions in the **Note** tab and sign the service without receiving any validation message, leading to incomplete data entry.

The system now displays a validation message both in the **Note** tab and during the signing process if the **Mode of Delivery** field is not selected, ensuring required fields are properly completed.

**Where to find it:**

1. **My Office** → **Groups** → **Groups List** → **New** → Fill **General** tab → **Save** → **Schedule** tab → **New Group Service** → Select **Date of Service and Clients** → **Select**
2. **Group Service Detail Screen** → **Group** tab → **Group Details** tab → **Services** tab → Fill **Service Information** → Select **Mode of Delivery** → **Save** → **Note** tab → Fill **Client Note** → **Save** → **Sign** → **Signature popup** → **PDF**

# Inquiry

| Reference No | Task No | Description |
|---|---|---|
| 78 | Core Bugs # 132350 | The 'Ethnicity', 'Race' and 'Client declined to Provide' field code names were sorted 'Alphabetically' not based on 'Sort Order' |
| 79 | Core Bugs # 132532 | Inquiry Save Restricted: Missing Staff or Workgroup error |

### Core Bugs # 132350: The 'Ethnicity', 'Race' and 'Client declined to Provide' field code names were sorted 'Alphabetically' not based on 'Sort Order'

**What's fixed:** Previously, the checkbox options for **Ethnicity, Race,** and **Client Declined to Provide** were displayed in alphabetical order instead of the configured Sort Order, causing inconsistencies across demographic sections.

The system now correctly sorts these fields based on the defined **Sort Order**. If multiple items share the same sort order, they will be sorted alphabetically within that group.

**Where to find it:**

- My Office → Inquiries → Click **New** → Inquiry Details screen
- Client → Client Information (C) screen
- Client → Agency/Program Discharge document
- Client → Registration Document (C)

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### Core Bugs # 132532: Inquiry Save Restricted: Missing Staff or Workgroup error

**What's fixed:** Previously, users were able to save an inquiry with a disposition value while leaving both the **Assigned Staff** and **Assigned Workgroup** fields blank. This caused an error when attempting to complete the inquiry later, displaying the message:

"Select value in either Staff or Workgroup."
and preventing completion.

The system now ensures that when the configuration key **TurnOnCareCoordinationWorkflow** is set to **Yes**, the **Assigned Staff** and **Assigned Workgroup** fields in the Disposition section are enabled if both are empty. This allows users to enter the required values and successfully complete the inquiry.

**Pre-requisite:**

- Set system configuration key **TurnOnCareCoordinationWorkflow** = Yes
  - Path: Administration → System Configuration → Select key → Set value to Yes

**Where to find it:**
My Office → Inquiries screen

- Select an **In Progress** inquiry → Go to **Disposition** section
- Confirm that either **Staff** or **Workgroup** must be selected before saving or completing the inquiry

# Methadone

| Reference No | Task No | Description |
|---|---|---|
| ~~82~~ | ~~Core Bugs #131825~~ | ~~MAT: System is allowing Pre pour the future Face To Face dose and to be dispensed.~~ |
| ~~84~~ | ~~Core Bugs # 132415~~ | ~~MAT: Client Column on 'MAT Management' List Page is too Narrow and 'Bottle/Box ID' Limited to 5 Characters on the 'Medication/Lot/Bottle Details' Screen.~~ |
| ~~85~~ | ~~Core Bugs # 132488~~ | ~~MAT: Incorrect status is displayed in MAT Management List page after a Take Home and Face to Face dispense.~~ |
| ~~86~~ | ~~Core Bugs # 132647~~ | ~~Issues in the 'MAT Management Details' screen~~ |
| ~~87~~ | ~~Core Bugs # 132685~~ | ~~MAT: 'Units' dropdown value is defaulted to 'mg' in the 'Medication/Lot/Bottle Details' screen.~~ |
| ~~88~~ | ~~Core Bugs # 132726~~ | ~~MAT - Dispense History Grid Cutting off Rows of Data~~ |

| | | |
|---|---|---|
| ~~89~~ | ~~Core Bugs # 132730~~ | ~~MAT: Successful dispense is not displayed on the MAT Management list and details pages Core Bugs~~ |
| ~~90~~ | ~~Core Bugs # 132731~~ | ~~MAT: Stuck in infinite loop after Calibration process when saying 'No' to Unprime prompt~~ |
| ~~91~~ | ~~Core Bugs # 132755~~ | ~~MAT - MAT Medication Mapping incorrect within Recode SetMedicationForMATMultiInventoryDispense~~ |
| ~~92~~ | ~~Core Bugs # 132764~~ | ~~MAT: Program Filter on MAT Management List page is not working.~~ |
| ~~93~~ | ~~Core Bugs # 132821~~ | ~~Med/lot/bottle bulk insert~~ |

## ~~Core Bugs # 131825: MAT: System is allowing Pre pour the future Face To Face dose and to be dispensed.~~

~~**What's fixed:** Previously, the system allowed users to pre-pour and dispense future Face-to-Face doses in the MAT Management Details screen, which was not intended behavior.~~

~~The system now correctly restricts future Face-to-Face doses from being pre-poured and dispensed. If **Commence Pre-pour** is checked, the Face-to-Face (cup) icon is disabled, and users can edit the dose type from Face-to-Face to Take Home.~~

~~Additionally, when **No Pump** is ON for past scheduled doses, the **Dispense** icon is now enabled and allows dispensing.~~

~~**Pre-requisites:**~~

- ~~MAT Configuration: **Allow Pre-Pours** is checked~~
- ~~MAT Order is signed for the selected client~~

~~**Where to find it:**~~

1. ~~**Go Search → MAT Management (My Office) → MAT Management List Page**~~
   - ~~Filter for past date~~
   - ~~Connect Machine/Inventory~~
   - ~~Click **No Pump Dispense** → Select No Pump Dispense = Yes, Reason → Continue~~
   - ~~Click **No Show** status → Change Current Status = Scheduled → Confirm warning → Change~~
   - ~~Click **Dispense** icon → MAT Management Details → Sign → Dispense Face-to-Face/Take Home~~
2. ~~**Go Search → MAT Management (My Office) → MAT Management List Page**~~
   - ~~Connect Machine/Inventory~~
   - ~~Click **Dispense** icon → MAT Management Details → Sign~~
   - ~~Check **Commence Pre-pour** → Attempt to dispense future Face-to-Face dose → Confirm cup icon is disabled~~

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## ~~Core Bugs # 132415: MAT: Client Column on 'MAT Management' List Page is too Narrow and 'Bottle/Box ID' Limited to 5 Characters on the 'Medication/Lot/Bottle Details' Screen.~~

~~**What's fixed:** Two UI issues were resolved:~~

1. ~~The **Client Name** column on the **MAT Management** list page was too narrow, making names difficult to read. It has now been widened to display full names without requiring hover.~~
2. ~~The **Bottle/Box ID** field on the **Medication/Lot/Bottle Details** screen was limited to 5 characters when starting with alphanumeric input. The limit has been increased to 6 characters. If more than~~

~~6 alphanumeric characters are entered, the following error is displayed:~~
~~*"Inventory Detail - Bottle/Box ID in alphanumeric format, allowing any number of letters and up to 6 digits."*~~

~~**Where to find it:**~~

~~**MAT Management List Page:**~~
~~Go to **My Office** → **MAT Management** → View the **Client Name** column.~~

~~**Medication/Lot/Bottle Details:**~~
~~Go to **My Office** → **Medication/Lot/Bottle** → Click **New** → On the **Details** screen, enter the **Bottle/Box ID**.~~

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### ~~Core Bugs # 132488: MAT: Incorrect status is displayed in MAT Management List page after a Take Home and Face to Face dispense.~~

~~**What's fixed:** Previously, after dispensing both **Face-to-Face** and **Take-Home** doses in the MAT Management Details screen, the MAT Management List page displayed incorrect status values for the respective records.~~

~~The system now correctly updates and displays the appropriate status based on the dispensing activity.~~

~~**Where to find it:**~~

1. ~~**Administration** → **Orders** → **Orders list page**~~
   - ~~Click **New** → Order Details screen~~
   - ~~Select **Medication** Order Type~~
   - ~~Set MAT fields: Medication Assisted Treatment = Yes, Machine Connection Required = Yes, Take Home Allowed = Yes, Display Program = Yes~~
   - ~~Click Save~~
2. ~~**My Office** → **Medication/Lot/Bottle list page**~~
   - ~~Click **New** → Enter required fields → Enter Location → Insert → Save~~
3. ~~**Client** → **Client Orders** → **Client Orders list page**~~
   - ~~Click New → Select Order from step 1~~
   - ~~Enter required fields → Select Take Home Days and Program → Do not select End Date → Insert → Save → Sign~~
4. ~~**My Office** → **MAT Management list page**~~
   - ~~Click **Connect User icon** → Fill Connection Details → Select Machine/Inventory → Check **Verified** → Click Connect~~
5. ~~**MAT Management list page**~~
   - ~~Select the Order → Click **Dispense** icon → Dispense Face-to-Face and Take-Home doses → Verify status updates in MAT Management List~~

~~**Status Behavior Examples:**~~

- ~~**Face-to-Face with pending Take-Home**: Status = In Progress until all Take-Home doses are dispensed, then changes to Completed~~
- ~~**All Take-Home doses**: Status = Completed after dispensing; if reverted, status changes to Scheduled~~
- ~~**All Face-to-Face doses**: Status = Completed after dispensing; if reverted, status changes to Scheduled~~

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### ~~Core Bugs # 132647: Issues in the 'MAT Management Details' screen~~

~~**What's fixed:** In **MAT Management**, two issues were resolved:~~

- ~~The **first Take Home label** was not printing immediately.~~

- ~~Dispensing a week of Take Homes was slow.~~

~~Now, the **Print Label** popup appears right after dispensing, and performance during multi-day dispensing has been improved. Additionally, the **MAT Client Level Setup** icon has been removed from the list screen to reduce load time.~~

~~**Where to find it:**~~
~~Go to **My Office** → **MAT Management** → Open the **MAT Management List** → Click **Connect Machine/Inventory** → Select the **Dispense** icon → On the **MAT Management Details** screen, click **Sign** → Click **Dispense** under the **Face-to-Face/Take Home** section in the dispensing grid.~~

~~**Pre-requisites:**~~

- ~~MAT Medication Inventory Details added to the Medication/Lot/Bottle Details screen~~
- ~~MAT Order signed~~
- ~~MAT Medication dispensed for the client~~

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### ~~Core Bugs # 132685: MAT: 'Units' dropdown value is defaulted to 'mg' in the 'Medication/Lot/Bottle Details' screen.~~

~~**What's fixed**: In the **Medication/Lot/Bottle Details** screen, the **Units** dropdown previously had no default value.~~

~~The Units dropdown now defaults to **'mg'**, improving data entry consistency.~~

~~**Where to find it:**~~
~~**My Office** → **Medication/Lot/Bottle** → Click **New** → On the **Details** screen, verify the **Units** field defaults to **'mg'**.~~

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### ~~Core Bugs # 132726: MAT - Dispense History Grid Cutting off Rows of Data~~

~~**What's fixed:** In the **MAT Management Details** screen, the **Dispense & No Show History** grid was cutting off rows of data. This happened because the grid's page size was limited to 30, even though the configuration allowed for viewing dispense history for the past 30 days. The grid no longer limits the number of rows based on page size and now displays all records according to the MAT Configuration setting.~~

~~**Pre-requisite:**~~

1. ~~Set **Show Dispense History for Past X Days to 30** in MAT Configuration.~~
2. ~~A MAT Order must be signed for the selected client.~~
3. ~~MAT Medication must be dispensed for the client.~~

~~**Where to find it:**~~

- ~~**MAT Management List Page** → **Connect Machine/Inventory** → Click **Dispense Icon** → **MAT**~~
- ~~**Management Details** screen → **Sign** → **Dispense via Face-Face/Take Home icon** → Click **'See Complete History'** hyperlink~~

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### ~~Core Bugs # 132730: MAT: Successful dispense is not displayed on the MAT Management list and details pages Core Bugs~~

~~**What's fixed:** In **MAT Management**, successful dispenses were not appearing on the **MAT Management list** and **details pages**, even after the medication was properly dispensed and signed. Additionally, validation was missing when modifying dispensed orders.~~

~~The system now correctly displays successful dispenses in both the list and details views. It also triggers a validation message when:~~

- ~~A dispensed client order is modified and signed with overlapping dates.~~
- ~~A new client order is created for a date range where the same medication has already been dispensed.~~

~~**Validation Message:**~~
~~“Client order exists for the selected range (Date range) and medication has already been dispensed. Please change the Start Date of the new Client Order.”~~

~~**Where to find it:**~~

1. ~~**Administration** → **Orders** → **New** → Select **Medication Order Type** → Fill required fields → Enable **MAT** options → **Save**~~
2. ~~**My Office** → **Medication/Lot/Bottle** → **New** → Fill required fields → **Save**~~
3. ~~**Client** → **Client Orders** → **New** → Select **MAT Order** → Fill required fields → **Save** and **Sign**~~
4. ~~**My Office** → **MAT Management** → Click **Connect User** → Fill **Connection Details** → **Connect**~~
5. ~~**My Office** → **MAT Management** → Select **Order** → Click **Dispense** icon → **Dispense dose**~~
6. ~~**Client** → **Client Orders** → **New** → **Select Order** → **Update Dose** → **Modify** → **Save**~~

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## ~~Core Bugs # 132731: MAT: Stuck in infinite loop after Calibration process when saying 'No' to Unprime prompt~~

~~**What’s fixed:** Users were getting stuck in an infinite loop during the **Calibration** process in **MAT** when selecting **"No"** on the **Unprime** prompt. Additionally, the **Medication** radio button was incorrectly set as the default filter in the **Medication/Lot/Bottle** list page.~~

~~The **Unprime** operation has been removed from the calibration flow. The **"Ok to empty pipe lines?"** warning will no longer appear. Instead, users will directly see the **"Unit closed. Would you like a printed report of this test?"** prompt.~~

~~The default filter in the **Medication/Lot/Bottle** list page is now set to **Bottle ID**, unless the user selects another option and clicks **Apply Filter**.~~

~~**Where to find it:**~~

- ~~**My Office** → **MAT Management** → **MAT Management** list page → Click **‘Connect user’** icon → Select and connect machine → Click **‘Calibrate’** icon~~
- ~~**My Office** → **MAT Dispenser** → **MAT Dispenser** list page → Click **‘Machine Name’** hyperlink → **MAT Dispenser Detail** → Click **‘Calibrate’** icon~~
- ~~**My Office** → **Medication/Lot/Bottle** → **Medication/Lot/Bottle** list page~~

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## ~~Core Bugs # 132755: MAT - MAT Medication Mapping incorrect within Recode SetMedicationForMATMultiInventoryDispense~~

~~**What’s fixed:** The **MAT Medication Mapping** was incorrect in the **SetMedicationForMATMultiInventoryDispense** recode category. Specifically, the mappings for the following medications were wrong:~~

- ~~**Suboxone 4 mg-1 mg sublingual film**~~
- ~~**Suboxone 12 mg-3 mg sublingual film**~~

~~The medications are now correctly mapped with the following IDs:~~

- ~~**91149** for Suboxone 4 mg-1 mg sublingual film~~
- ~~**91151** for Suboxone 12 mg-3 mg sublingual film~~

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~~**Where to find it:**~~
~~**Administration** → **Recodes** → **SetMedicationForMATMultiInventoryDispense**~~

### ~~Core Bugs # 132764: MAT: Program Filter on MAT Management List page is not working.~~

~~**What's fixed:** Previously, when users selected a **Program** in the **Program filter** on the **MAT Management List** page, then navigated to another screen and returned, the **Program** filter reset to 'All Programs', causing users to lose their filter selections.~~

~~The system now retains the selected filters for **Program, Orders,** and **Flag Type** when navigating away and returning to the **MAT Management Lis**t page, improving usability and consistency.~~

~~**Note:** Filter selections for **Date** and **Status** fields are not retained.~~

~~**Where to find it:**~~
~~**Go Search** → **MAT Management** → **MAT Management List** page → **Apply filters (Program, Orders, Flag Type)** → Navigate away → Return to page → Confirm filters are retained~~

### ~~Core Bugs # 132821: Med/lot/bottle bulk insert~~

~~**What's fixed:** When entering bulk inventory in **Medication/Lot/Bottle**, bottle number sequencing was incorrect. Additionally, in the **Generate Bottles popup**, users were able to save invalid Bottle/BoxId values (e.g., A1234567) despite error messages being displayed.~~

~~The system now ensures:~~

- ~~Bottle numbers follow the correct sequence during bulk inventory entry.~~
- ~~**Invalid Bottle/BoxId** values cannot be saved. An error is shown, and saving is blocked until corrected.~~

~~**Where to find it:**~~

1. ~~My Office → Medication/Lot/Bottle → New~~
2. ~~My Office → Medication/Lot/Bottle → Click Generate Bottles icon~~

# ~~Mobile~~

| ~~Reference No~~ | ~~Task No~~ | ~~Description~~ |
|---|---|---|
| ~~94~~ | ~~Core Bugs # 132707~~ | ~~The PDF incorrectly displayed the clinician's signing suffix next to the client's name when signed via the mobile WebApp.~~ |

### ~~Core Bugs # 132707: The PDF incorrectly displayed the clinician's signing suffix next to the client's name when signed via the mobile WebApp.~~

~~**What's fixed:** When a clinician signed a document via the **Mobile WebApp**, the resulting **PDF** incorrectly displayed the clinician's **signing suffix** next to the **client's name**, leading to confusion and misidentification.~~

~~The **client's name** now appears correctly in the PDF without the clinician's suffix, ensuring accurate representation of signers.~~

~~**Where to find it:**~~

- ~~Login to **Mobile WebApp** → Enter **SmartKey** → **Home** → **Documents** → **Create Document** → Select **Client** → Fill required fields → **Sign** → Enter **SmartKey** → **Sign** → **Client Sign** → Sign in signature canvas~~
- ~~Select **Client** → **Search for Documents** → **Open signed document** → **View PDF**~~

# My Calendar

| Reference No | Task No | Description |
|---|---|---|
| 96 | Core Bugs # 132663 | Slowness in the Staff Calendar screen. |
| 97 | Core Bugs # 132739 | My Calendar: Issue with using Quotation Mark in ‘Comments’ section while creating a Service |
| 98 | Core Bugs # 132811 | New Calendar Entry items not synching with Outlook |

### Core Bugs # 132663: Slowness in the Staff Calendar screen.

**What’s fixed:** Previously, users experienced **slowness** on the **Staff Calendar** screen when attempting to schedule appointments. A processing indicator would appear, and the screen would continue loading, preventing users from completing the scheduling process.

The **Calendar screen** now loads promptly, allowing users to schedule appointments without delay.

**Where to find it:**
**My Office** → **New Calendar Entry** → Select date → Click time slot → In New Entry popup:

- Select **New Calendar Entry** radio button → Click OK
- In **Scheduler Event** popup: Enter required fields
- In **Add Additional Staff** section: Enter required fields → Click OK

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### Core Bugs # 132739: My Calendar: Issue with using Quotation Mark in ‘Comments’ section while creating a Service

**What’s fixed:** When creating a **Service** with comments containing special characters—especially quotation marks (“)—the service entry was not appearing on the **My Calendar** page.

Services created with comments that include quotation marks or other special characters are now correctly displayed on the **My Calendar** page.

**Where to find it:**

- **Client** → **Services** → **Services list page** → Click **‘New’** → **Service Detail** → Enter required fields and comments (including **special characters**) → **Save**
- **Client** → **Services/Notes** → **Services/Notes list page** → Click **‘New’** → **Service Note** → Enter required fields and **comments** → **Save**
- **My Office** → **My Calendar** → Hover over the created **service entry**

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### Core Bugs # 132811: New Calendar Entry items not synching with Outlook

**What’s fixed:** New calendar entries created in SmartCare were not syncing with **Outlook**, resulting in scheduled appointments not appearing in the **Outlook calendar**.

The system now successfully syncs new calendar appointments with **Outlook**, ensuring scheduled events are properly reflected.

**Where to find it:**
**My Office** → **New Calendar Entry** → Select **date** → Click **time slot** → **New Entry pop-up** → Select **New Calendar Entry** → **OK** → **Scheduler Event pop-up** → Fill required fields → **OK**

# My Reports/UDS Reports

| Reference No | Task No | Description |
|---|---|---|
| 111 | Core Bugs # 132321 | The ‘ClientWasPresent’ flag is not present in the ‘Services with Procedure Rate Errors’ Report |
| 112 | Core Bugs # 132572 | ‘Payment Receipt Report’ Issue. |
| 113 | Core Bugs # 132709 | Getting an error when generating ‘ER Claim Line Details’ or ‘ER Claim Line Details CSV’ reports. |
| 114 | Core Bugs # 132796 | Reports name not displayed correctly in search bar. |
| 115 | Core Bugs # 132847 | Some fields are removed from the XML files for some record types in the IPFQR List Page. |
| 116 | Core Bugs # 132858 | Incident Reports list page and widget not showing accurate number of incidents. |

### Core Bugs # 132321: The ‘ClientWasPresent’ flag is not present in the ‘Services with Procedure Rate Errors’ Report

**What’s fixed**: The **ClientWasPresent** flag was missing from the **Services with Procedure Rate Errors** report. This has been resolved. A new column, Client Was Present, has been added to the report with a Y/N flag:

**Y** = Rate meets the Client Was Present criteria

**N** = Rate does not meet the criteria

**Where to find it:**

**Service Creation:**
Go to **Search** → **Services** → **Click New** → Create a service that triggers the “Unable to find matching rate for the selected procedure” validation.

**Report Access:**
Go to **Search** → **My Reports** → **Services with Procedure Rate Errors** → Enter **Date of Service Start** and **Date of Service End** → Click **View Report**.

### Core Bugs # 132572: ‘Payment Receipt Report’ Issue.

**What’s fixed:** Previously, the **Payment Receipts Report** did not include payment records that were entered without a value in the **Location** field on the Payments/Adjustments screen. This caused discrepancies between the report totals and the data exported from the Payments/Adjustments list page.

With this release, the report now includes all payment records—regardless of whether the Location field was filled—ensuring accurate totals that align with the Payments/Adjustments list data.

**Where to find it:**

1. **My Office** → **Payments/Adjustments** → Enter ‘Received From’ and ‘Received To’ dates → Apply Filter
2. **My Office** → **My Reports** → Search “Payment Receipts Report” → Click report name → Enter parameters and matching date range

### Core Bugs # 132709: Getting an error when generating ‘ER Claim Line Details’ or ‘ER Claim Line Details CSV’ reports.

**What's fixed:** Users were receiving an error when generating the **ER Claim Line Details** or **ER Claim Line Details CSV** reports if the selected **ERFileId** included multiple services grouped under the same **ClaimLineItemId**.

Reports now generate successfully and display the correct data, even when multiple services are grouped under the same claim line.

**Pre-requisite:**
Process an 835 file that includes multiple services under the same ClaimLineItemId and note the corresponding ERFileId.

**Where to find it:**

- **My Office → My Reports**
    - Search for **ER Claim Line Details** or **ER Claim Line Details CSV**
    - Click the report name → Enter the **ERFileId** → Click **View Report**

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### Core Bugs # 132796: Reports name not displayed correctly in search bar.

**What's fixed:** When users searched for reports or QuickLinks associated with **My Office** in the **Search Bar**, the system incorrectly displayed a generic QuickLink labeled **"View Report"** instead of the actual report name. The search results now correctly display the actual report names, and **GoSearch** results return the expected output.

**Pre-requisite:**
Set all QuickLinks associated with **My Office** to **Deny** in the **Roles/Permissions** tab of the **Staff Details** screen.

**Where to find it:**
Click **Search** Bar → Type and search for **QuickLinks/Reports** associated with **My Office**

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### Core Bugs # 132847: Some fields are removed from the XML files for some record types in the IPFQR List Page.

**What's fixed**: Certain fields were incorrectly included in the **XML files** for specific record types in the **IPFQR List Page**, due to custom logic in the customer's environment.

The following fields have been removed from the **XML files** for the respective record types:

- **IMM:** Removed **Header** and **Sex** field
- **SMD, SUB, TOB, TR**: Removed **<file-audit-data>, <abstraction-audit-data>,** and **Sex** field

**Note:** This fix is specific to environments with customized logic for **IPFQR XML** generation.

**Where to find it:**
**My Office → IPFQR List Page**

---

### Core Bugs # 132858: Incident Reports list page and widget not showing accurate number of incidents.

**What's fixed:** The **Incident Reports** list page and the **Incident Reports (C)** widget on the **Dashboard** were not displaying the correct number of incidents, leading to discrepancies in reporting. The system now accurately reflects the total number of incidents in both the list page and the dashboard widget, ensuring reliable incident tracking.

**Where to find it:**

1. Search and select **Incident Reports (My Office)** → Confirm the newly saved incident appears in the total count
2. Go to **Dashboard (My Office)** → View the **Incident Reports (C)** widget

# Patient Portal

| Reference No | Task No | Description |
|---|---|---|
| 118 | Core Bugs # 132538 | Patient Portal login issue |

### Core Bugs # 132538: Patient Portal login issue

**What's fixed:** Previously, when a Patient Portal ID was deleted and then recreated from the **Client Information (C)** screen or **Contacts** tab, the system failed to populate the temporary **Username** and **Password** in the Change Password PDF after clicking **Reset**. This prevented clients from logging into the Patient Portal.

The system now correctly generates and displays the temporary credentials in the Change Password PDF, allowing successful login after resetting the Patient Portal ID.

**Where to find it:**

1. **Client** → **Client Information (C)**
   - Click **Patient Portal ID** hyperlink → Navigate to Non-staff User Details
   - Click **Delete** → Click **Create** → Click **Reset** → Confirm credentials appear in Change Password PDF
2. **Client** → **Client Information (C)** → **Contacts tab**
   - Select a Client Contact → Click **Patient Portal ID** hyperlink
   - Click **Delete** → Click **Create** → Click **Reset** → Confirm credentials appear in Change Password PDF

# Plans

| Reference No | Task No | Description |
|---|---|---|
| 119 | Core Bugs # 132437 | Coverage: Leading/trailing spaces are preventing the duplicate prevention validation message from triggering correctly. |

### Core Bugs # 132437: Coverage: Leading/trailing spaces are preventing the duplicate prevention validation message from triggering correctly.

**What's fixed:** The system previously failed to detect duplicate Coverage records when the Insured ID field included leading or trailing spaces (e.g., " 123" or "123 "), allowing unintended duplicates.

The Insured ID field is now automatically trimmed, and if a duplicate exists, the system displays the following validation message:
**"Plan with Insured ID already exist."**

**Where to find it:**
Go to **Client** → **Coverage** → **Coverage** list page → Click on any **Plan Name** hyperlink → **Client Plans** screen → **Insured ID** field.

**Pre-condition:**
A coverage record exists with a specific plan and Insured ID (e.g., "123").

# Procedures/Rates

| Reference No | Task No | Description |
|---|---|---|
| 121 | Core Bugs # 132551 | expired ProcedureRateId are retrieving when service is created. |

**Core Bugs # 132551: expired ProcedureRateId are retrieving when service is created.**

**What's fixed:** Previously, when creating a service, the system was incorrectly retrieving **expired ProcedureRateId** values if the procedure's **ToDate** had passed (e.g., '2025-08-04 23:59:59.000'). This caused outdated rates to be applied during charge generation.

The system now correctly retrieves only **unexpired ProcedureRateId** values when creating services, ensuring accurate billing and rate assignment.

**Where to find it:**

1. **Client → Services → Services list page**
   - Click **New** → Enter required fields → Complete the service
   - Click on **Charge** amount hyperlink → Charge Details screen → Billing Code section → Click Rate ID hyperlink
2. **My Office → Charges/Claims → Charges/Claims list page**
   - Select **Charge ID** → Click **E Claims** → Claims Processing pop-up → Enter details → Click **Process Now** → Click **Create Claim File**
   - Confirm correct amount in **SV segment**

# Programs

| Reference No | Task No | Description |
|---|---|---|
| 122 | Core Bugs # 132617 | The 'Assigned Staff' dropdown excluded inactive staff for existing client program entries in the 'Program Assignment Details' page. |

**Core Bugs # 132617: The 'Assigned Staff' dropdown excluded inactive staff for existing client program entries in the 'Program Assignment Details' page.**

**What's fixed:** The **'Assigned Staff'** dropdown on the **Program Assignment Details** page did not display inactive staff for existing program entries, causing the field to appear blank if the assigned staff member was no longer active.

Inactive staff now appear in the dropdown for existing assignments, preserving historical accuracy.
**Note**: Inactive staff are still excluded when creating new program entries.

**Where to find it:**

**Option 1**: **Program** → **Program Assignments** → Open an existing assignment → Check **Assigned Staff** dropdown

**Option 2: Client** → **Programs** → Open an existing program → Check **Assigned Staff** dropdown

# Provider Contract

| Reference No | Task No | Description |
|---|---|---|
| 123 | Core Bugs # 132717 | The Contract Details screen was labeled with the same name in both the Provider Contracts and Contracts screens. |

**Core Bugs # 132717: The Contract Details screen was labeled with the same name in both the Provider Contracts and Contracts screens.**

**What's fixed**: The **Contract Details** screen previously displayed the same label in both the Provider Contracts and Contracts sections, which caused confusion. In **Provider Contracts**, the screen is labeled "**Contract Details (Provider)**"

In **Contracts**, it is labeled "**Contract Details (My Office)**"

**Where to find it:**

**My Office** → **Provider Contract** → **Provider** hyperlink → **Provider** → **Provider Contract**
**My Office** → **Contracts** → **Contract ID** hyperlink

## Reception

| Reference No | Task No | Description |
|---|---|---|
| 125 | Core Bugs # 132641 | The Appointment is duplicating when attempting to reschedule. |

**Core Bugs # 132641: The Appointment is duplicating when attempting to reschedule.**

**What's fixed:** Rescheduling a Service Appointment was causing duplicate entries to appear on the Calendar screen.

Rescheduling now cancels the original appointment and creates a single updated entry, ensuring accurate scheduling.

**Where to find it:**
Create a **New Service** → **Save** → Go to **Reception** screen → Filter by date → Click **Number of Times Rescheduled** → Select time and reschedule → Confirm only one appointment appears on the Calendar.

## Rx Application

| Reference No | Task No | Description |
|---|---|---|
| 131 | Core Bugs # 132267 | Start page: Outbound Prescribers are displayed as blank when filtered by clinicians in the database while running the specific stored procedure. |
| 132 | Core Bugs # 132592 | RX - Patient Summary - Medication list is not loading. |
| 133 | Core Bugs # 132625 | Rx: duplicate instructions were displayed for existing client order under the Medication List section in the Patient Summary page. |
| 134 | Core Bugs # 132813 | Slowness when navigating from SmartCare to Rx. |
| 135 | Core Bugs # 132854 | The 'X' button was visible for SmartCare Orders in the Patient Summary screen, despite being non-functional. |
| 136 | Core Bugs # 132855 | Inactive allergies are displayed in the 'Current Allergies' widget of SmartView.. |

**Core Bugs # 132267: Start page: Outbound Prescribers are displayed as blank when filtered by clinicians in the database while running the specific stored procedure.**

**What's fixed:** The stored procedure ssp_SCGetSureScriptOutboundPrescription was returning no results and had long execution times when filtering **Outbound Prescribers** by clinicians.

The procedure logic has been optimized, and results are now retrieved successfully within 7 seconds.

**Where to find it**:
Not applicable (backend stored procedure execution).

---

### Core Bugs # 132592: RX - Patient Summary - Medication list is not loading.

**What's fixed**: Previously, when a client had a large number of diagnosis codes listed in the **Patient Overview** tab, the **Medication List** section on the **Patient Summary** screen (Rx Application) would shrink unexpectedly. This was due to the absence of a scrollbar to manage overflow content, resulting in limited visibility and a poor user experience.

With this release, a **scrollbar** has been added to the **Patient Overview** tab. This ensures that overflow content is properly handled and the **Medication List** section remains fully visible, regardless of the number of diagnosis codes.

**Where to find it:**
Search and select a client → **Medication Management (Client)** → **Patient Summary** screen **(Rx Application)**

---

### Core Bugs # 132625: Rx: duplicate instructions were displayed for existing client order under the Medication List section in the Patient Summary page.

**What's fixed:** The **Patient Summary** page in the Rx application was showing duplicate instructions for existing client orders under the **Medication List** section.

Instructions now display correctly without duplication.

**Where to find it:**
Search for a client → Create a **New Client Order** → Select medications and complete required fields → Sign the order → Go to **Medication Management (Rx)** → Open the **Patient Summary** page → Review the **Medication List** section.

---

### Core Bugs # 132813: Slowness when navigating from SmartCare to Rx.

**What's fixed:** Previously, users experienced slowness when navigating from the SmartCare application to the Rx application via the **Patient Summary** screen, impacting performance and workflow efficiency.

The system now loads the Rx application smoothly without delays when accessed from SmartCare.

**Where to find it:**
**Select a client → Medication Management (Client) → Patient Summary screen (Rx Application)**

---

### Core Bugs # 132854: The 'X' button was visible for SmartCare Orders in the Patient Summary screen, despite being non-functional.

**What's fixed: The 'X' (Discontinue)** button was incorrectly visible for SmartCare **Orders** in the **Patient Summary** screen of the Rx Application, even though it was non-functional. This caused confusion for users attempting to manage orders.

The system now hides the **'X' button** for **SmartCare Orders** until the order is completed within the Rx Application, ensuring a clearer and more intuitive user experience.

**Where to find it:**
Search and select a client → Go to **Medication Management (Client) → Patient Summary screen (Rx Application) → View Medication list**

---

**Core Bugs # 132855: Inactive allergies are displayed in the 'Current Allergies' widget of SmartView..**

**What's fixed**: Inactive allergies were incorrectly appearing in the **Current Allergies** widget within **SmartView**, leading to inaccurate patient data being displayed.

The system now correctly filters out inactive allergies, ensuring that only active allergies are shown in the **Current Allergies** widget for accurate and relevant clinical information.

**Where to find it:**
**Client** → **Client Allergies** → **Client Allergies** screen → Click **SmartView** icon → Navigate to **Current Allergies** widget

# Scanning

| Reference No | Task No | Description |
|---|---|---|
| 137 | Core Bugs # 131096 | 'Acknowledgements' and 'Acknowledge with Comments/ Forward Acknowledgement' icons are not showing as intent in Scanned and Uploaded Documents |

**Core Bugs # 131096: 'Acknowledgements' and 'Acknowledge with Comments/ Forward Acknowledgement' icons are not showing as intent in Scanned and Uploaded Documents**

**What's fixed:** The **'Acknowledgements'** and **'Acknowledge with Comments / Forward Acknowledgement'** icons were not functioning as intended in the **Scanned Medical Record Detail** and **Upload File Detail** screens. These icons did not reflect the setup configured in the **Document Code Details** screen.

The icons now behave correctly based on the **'Enable Document Acknowledgement'** setting in the associated **Document Code**. When users select the appropriate **Record Type** and save the document, the icons are enabled or disabled as expected.

**Pre-requisite:**

- In **Administration** → **Document Codes**, open the relevant **Scanned Document Code**
- Set **Enable Document Acknowledgement** to **Yes**
- Select either **Default Staff to Acknowledge** or **Default Role to Acknowledge**
- Click **Save**

**Where to find it:**

- **My Office** → **Scanning** → **Scanned Medical Records** → **Scan New Images** → **Scanned Medical Record Detail** → **Select Record Type** → **Save**
- **My Office** → **Scanning** → **Scanned Medical Records** → **Upload New Images** → **Upload File Detail** → **Select Record Type** → **Save**

# Screens

| Reference No | Task No | Description |
|---|---|---|
| 139 | Core Bugs # 132495 | The disabled delete (X)icon in Custom grid was getting activated for the restricted Staffs and Roles |

**Core Bugs # 132495: The disabled delete (X)icon in Custom grid was getting activated for the restricted Staffs and Roles**

**What's fixed:** Previously, the **Delete (X)** icon in custom grids was incorrectly activated for staff and roles that were restricted from using it. This allowed unauthorized users to trigger a delete confirmation pop-up, despite the control being disabled.

The system now correctly enforces permission restrictions. When the delete icon is disabled for restricted staff, it no longer responds to user interaction or displays the confirmation pop-up.

**Pre-requisites:**

- Login to SmartCare as **Admin Staff**
- Use hotkey CTRL + ALT + M to insert the delete control on a custom grid
- Confirm the control is subject to permission management
- Ensure permission for **Delete Button** is disabled for non-admin staff

**Where to find it:**
Login to SmartCare as **Non-admin Staff** → Navigate to a screen with a configured custom grid → Hover over the **Delete (X)** icon → Confirm it remains disabled and does not trigger any action

# Services from Claims

| Reference No | Task No | Description |
|---|---|---|
| 140 | Core Bugs # 132476 | MCO-PM Transfer: Claim Count Did not match at the different steps in the process. |

### Core Bugs # 132476: MCO-PM Transfer: Claim Count Did not match at the different steps in the process.

**What's fixed:** Previously, when processing claims through the MCO-PM Transfer workflow, multiple services were incorrectly created from a single claim line if it included multiple locations for the filed Place of Service. This caused mismatched claim counts across different steps in the process.

The system now includes a defensive condition to prevent duplicate processing of **ClaimLineIds**, ensuring that only one service is created per claim line.

**Where to find it:**
My Office → Services From Claims → Select claim lines → Click **Create Service** icon → Confirm only one service is created per claim line

# Services

| Reference No | Task No | Description |
|---|---|---|
| 142 | Core Bugs # 132282 | The calculation of the procedure rate was not correct, when a service was created |
| 143 | Core Bugs # 132385 | Services: application allowed the users to change the service's status from Complete to No Show across browsers. |
| 144 | Core Bugs # 132603 | Separate Dx code for Add On services in Primary Care |
| 145 | Core Bugs # 132635 | Individual services just "popped up" in the last 5 hours. |
| 146 | Core Bugs # 132699 | Batch Service Import: Upload New Services pop up is displayed blank. |

| | | |
|---|---|---|
| 147 | Core Bugs # 132765 | a "Timeout Expired" error is logged in the 'ErrorLog' table. |
| 148 | Core Bugs # 132785 | 'Services (My Office) List' page: Implemented a new 'Failed Services' pop-up for error and mass complete for services. |

### Core Bugs # 132282: The calculation of the procedure rate was not correct, when a service was created

**What's fixed:** Procedure rates were being calculated incorrectly when the associated service area was mapped to the **XSPENDOWN** recode. This issue has been resolved. Now, if a procedure rate uses a service area linked to **XSPENDOWN**, that rate is excluded during service creation, ensuring accurate calculations.

**Where to find it:**

**Recode Setup:**
Go to **Administration** → **Recodes** → Search for **XSPENDOWN** → Add the Service Area ID in the **Integer Code Id** field.

**Procedure Rate Setup:**
Create a procedure rate using the service area mapped above.

**Service Creation:**
Go to **Client** → **Services** → **New** → Create a service using the procedure code tied to the configured service area.

---

### Core Bugs # 132385: Services: application allowed the users to change the service's status from Complete to No Show across browsers.

**What's fixed:**

Previously, users could change a service's status from **Complete** to **No Show** across different browsers, leading to inconsistent behavior. Now, once a service is marked as **Complete** in one browser (e.g., Chrome), its status cannot be changed from another browser (e.g., Edge), ensuring consistent status handling and data integrity.

**Where to find it:**

**Step 1 (Edge):**
Go to **Client Search** → Select a client with a coverage plan → Navigate to **Services** → Create and save a service with **Scheduled** status.

**Step 2 (Chrome):**
Go to **Client Search** → Select the same client → Locate the scheduled service → Change status to **Complete** → Click **Save**.

**Step 3 (Edge):**
Open the same service → Attempt to change status to **No Show** → Status change is now restricted.

---

### Core Bugs # 132603: Separate Dx code for Add On services in Primary Care

**What's fixed:** In **Primary Care**, add-on services were incorrectly displaying all diagnosis (Dx) codes in the service detail, instead of only showing the Dx code selected during the signing of the **Medical Progress Note**.

The system now correctly displays only the Dx code added in the **Add-On Code** tab at the time of signing the **Medical Progress Note**, ensuring accurate billing and documentation.

**Where to find it:**
**Client** → **Medical Progress Note** → **New** → Select **Abdominal Pain template** → **Order Problem List** → Enter values → **OK** → **Sign**
→ **Services (Client)** → Select created service → Mark as **Complete**
→ **Services** → Select **Add-On service** → **Billing Procedure**

---

## Core Bugs # 132635: Individual services just "popped up" in the last 5 hours.

**What's fixed:** Recurring services unexpectedly appeared for past dates due to system behavior tied to a configuration setting.

This has been resolved by introducing a new configuration key: **CreateRecurringServicesForPastDates**.

- When set to **Yes** (default), recurrences are created for both past and future dates.
- When set to **No**, only future recurrences are created.
- Any other value defaults to **Yes** behavior.

**Where to find it:**

- Go to **Administration** → **Configuration Keys** → Open **CreateRecurringServicesForPastDates** → Update value as needed
- View recurrence behavior in:
    - **Client** → **Services** → **Service Detail** → **Edit Recurring**
    - **Client** → **Services/Notes** → **Service Note** → **Edit Recurring**
    - **My Office** → **Groups** → **Group Details** → **Schedule** → **Edit Recurring**

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## Core Bugs # 132699: Batch Service Import: Upload New Services pop up is displayed blank.

**What's fixed**: The **Upload New Services** popup in **Batch Service Import** was appearing blank when users clicked the **Upload Import File** icon.

The popup now displays correctly with all required options to select and upload a file.

**Where to find it:**
**My Office** → **Batch Service Import Files** → Click **Upload Import File** → Confirm the **Upload New Services** popup displays as expected.

---

## Core Bugs # 132765: a "Timeout Expired" error is logged in the 'ErrorLog' table.

**What's fixed:** Users encountered a **"Timeout Expired"** error when attempting to export a large volume of data from the **Services List** page. The error was logged in the ErrorLog table, and the export operation failed.

Users can successfully export large volumes of Services data to Excel without errors, and no timeout entries are logged in the ErrorLog table.

**Where to find it:**
**My Office** → **Services** → Enter filter values → Select **Date** range → **Apply filter** → Click **Export** icon

---

## Core Bugs # 132785: 'Services (My Office) List' page: Implemented a new 'Failed Services' pop-up for error and mass complete for services.

**What's changed:** A new **Failed Services pop-up** has been implemented on the **Services (My Office) List** page to display error messages when attempting to mass complete or error services that do not meet payment criteria.

When users attempt to error a completed service where the balance payment is not zero, the system now displays an error message with the Service ID:

**Error Message**: "Service ID: XXXX - Service cannot be deleted since the balance of the payment is not zero."

This pop-up also appears during mass completion of services, showing exception messages for any failed services.

**Where to find it:**

1. **Configuration Setup:**
   **Administration** → **Configuration Keys** → Search for **ALLOWSERVICEERRORWITHPAYMENT** → **Apply Filter** → Click on **Configuration Key** → Ensure value is set to **N**
2. **To trigger error message**:
   **Client Search** → Select **Client** → **Services** → Click on **New** → Fill in **Service Details with Charge** → **Save** → **Complete Service** → **Make Payment** →
   **My Office** → **Services List** → Select **Service** → Select **Action: Error** → **Confirm** → View **Failed Services pop-up**
3. **To trigger mass complete error message:**
   **My Office** → **Services List** → Filter for services in **'Show'** status → Select multiple services → Select **Action: Complete** → **Confirm** → View **Failed Services pop-up**

**Note:** Only services with a zero balance can be errored.

# Services/Notes

| Reference No | Task No | Description |
|---|---|---|
| 150 | Core Bugs # 132531 | The client name is not displayed when opening a private window from the 'Service Note' page. |
| 151 | Core Bugs # 132582 | The system was not displaying all the available procedures in the dropdown, regardless of the selected program. |
| 152 | Core Bugs # 132620 | JavaScript error is logged on the 'ErrorLogViewer'. |
| 153 | Core Bugs # 132706 | The 'GOALOBJECTIVESTATUS' Global Code Sort Order is not being honored in the DFA note. |

### Core Bugs # 132531: The client name is not displayed when opening a private window from the 'Service Note' page.

**What's fixed:** Previously, when users opened a **Private Window** from the **Service Note** page, the client's name was not displayed in the new window, causing confusion and lack of context.

The system now correctly displays the client's name when the Private Window is launched from the Service Note page.

**Where to find it:**
Client → Services/Notes → Services/Notes list page → Click on **DOS** hyperlink → Service Note page → Click **Private Window** icon → Confirm client name is displayed in the new window

### Core Bugs # 132582: The client name is not displayed when opening a private window from the 'Service Note' page.

**What's fixed:**

Previously, the system did not display all available procedures in the **Procedure** dropdown when a specific program or the **All Programs** option was selected. This caused incomplete data in the **Service Note PDF** output, as the dropdown only showed procedures mapped to the selected program and did not account for the AllowAllPrograms configuration.

With this release, the **AllowAllPrograms** logic has been implemented. The system now displays **all available procedures** in the dropdown, regardless of the selected program, ensuring complete and consistent Service Note PDF generation.

**Where to find it:**
**Client** → Search **Services Note Reviewer (Client)** → Select Date → Select Previous No. of Days → Select Program(s) → Select Procedure(s) → Select Status(s) → Click **View PDF**

### Core Bugs # 132620: JavaScript error is logged on the 'ErrorLogViewer'.

**What's fixed:** Previously, when users attempted to create or modify a **Service Note** (e.g., CPST Note), a **JavaScript error** was logged in the **ErrorLogViewer** list page. This disrupted the workflow and indicated a backend issue with screen record handling.

The system no longer logs JavaScript errors in the ErrorLogViewer when users create or modify Service Notes.

**Where to find it:**

1. **Client** → **Services/Notes** → Click **New** → Select Program, Procedure, and Location → Enter required data → Click **Save**
2. **Administration** → **ErrorLogViewer** → View log entries

### Core Bugs # 132706: The 'GOALOBJECTIVESTATUS' Global Code Sort Order is not being honored in the DFA note.

**What's fixed:** In **DFA Notes**, the **Objective Status** dropdown was ignoring the custom sort order defined in the **GOALOBJECTIVESTATUS** Global Code and defaulting to alphabetical order.

If a Sort Order is defined in the Global Code, the dropdown now respects it. If not, it continues to sort alphabetically.

**Where to find it:**

- **Set sort order**: Go to **Global Codes** → Filter by category **GOALOBJECTIVESTATUS** → Open the category → Set and save the desired Sort Order for each code.
- **Use in note**: Go to **Client** → **Services/Notes** → Create a new DFA Note using a procedure code that includes the **Objectives Addressed by this Service** section → In the **Note** tab, verify that the **Goal Status** dropdown reflects the configured sort order → Sign the note.

# SmartCare improvements

| Reference No | Task No | Description |
|---|---|---|
| 154 | Core Bugs # 132535 | list pages: Export Button Fails to Generate Download |
| 155 | Core Bugs # 132834 | Unsupported Browser Warning for Microsoft Edge Mobile on SmartCare |

### Core Bugs # 132535: list pages: Export Button Fails to Generate Download

**What's fixed:** Previously, the **Export** button on list pages failed to generate a downloadable file when the search criteria included special characters. This issue was first identified on the **Document Validations** screen, where using symbols like "+" in filters prevented the export from working.

The system now correctly handles special characters in search criteria, allowing users to export filtered results to Excel without any issues.

**Where to find it:**
Navigate to any list page → Apply filters with special characters → Click **Export** → Confirm file is downloaded successfully

## Core Bugs # 132834

**What's fixed:** Users accessing SmartCare via the Microsoft Edge mobile browser on iPhone or iPad were incorrectly shown an "unsupported browser" error message, instructing them to use Google Chrome.

The system now correctly supports Microsoft Edge on iOS devices. Users can access the SmartCare login screen without encountering browser compatibility warnings.

**Where to find it:**
Open the SmartCare application link on iPhone or iPad using one of the following browsers:

- Chrome
- Edge
- Safari
- Firefox

# Staff/Users

| Reference No | Task No | Description |
|---|---|---|
| 156 | Core Bugs # 132880 | The credentialing grid failed to load all existing details in the ‘Credentialing’ tab of the ‘Staff Details’ screen. |

### Core Bugs # 132880: The credentialing grid failed to load all existing details in the ‘Credentialing’ tab of the ‘Staff Details’ screen.

**What’s fixed:** Previously, the credentialing grid in the Staff Details screen failed to load all existing entries when either the **CoveragePlanId** or **PayerId** was missing due to backend uploads or table editor changes. This caused incomplete data to appear in the Credentialing tab.

The system now includes defensive UI logic to handle missing CoveragePlanId or PayerId values, ensuring the credentialing grid loads all existing details reliably.

**Where to find it:**

1. **Administration** → **Staff/Users** → **Staff/Users** list page
   - Click **New** → **Staff Details** → **Credentialing** tab
   - Select **Coverage** radio button → Choose **Plan** → Enter required values → Click **Insert** → Click **Save**
2. **Administration** → **Staff/Users** → **Staff/Users** list page
   - Click **New** → **Staff Details** → **Credentialing** tab
   - Select **Payer** radio button → Choose **Plan** → Enter required values → Click **Insert** → Click **Save**

# Work Groups list screen

| Reference No | Task No | Description |
|---|---|---|
| 157 | Core Bugs # 132727 | The ‘Export’ Functionality is not working in the ‘Work Groups’ List Page |

### Core Bugs # 132727: The ‘Export’ Functionality is not working in the ‘Work Groups’ List Page

**What’s fixed:** The **Export** functionality was not working on the **Work Groups** list page, preventing users from exporting data as expected. The **Export** feature is now functioning correctly and allows data to be exported from the **Work Groups** list screen.

**Where to find it:**
**Administration** → **Work Groups** → **Work Groups** list page

# Global Codes

Global Codes are the individual entries or options assigned to a Global Code Category. Global Codes can be core or custom. For example, a Global Code Category and the associated Global Codes are the options you will select from a dropdown list.

Review and configure the following Global Code Categories and Global Codes that belong to each category before performing the workflows documented in these release notes.

| Ref No. | Category Name |
|---|---|
| 10 | ClearingHouse |
| 21 | PLACEOFSERVICE |
| 78 | Ethnicity |
| 78 | RACE |
| 78 | ClientConsents |
| 153 | ‘GOALOBJECTIVESTATUS’ |

# Recodes

A Recode is a subset of other system codes that populate a list for a specific reporting purpose. Recodes create an allowed list of entries from multiple larger lists.

Review and configure the following before performing the workflows documented in these release notes.

| Ref No. | Category Code |
|---|---|
| 91 | SetMedicationForMATMultiInventoryDispense |
| 142 | 'XSPENDOWN' |

# Configuration Keys

Configuration keys are settings that instruct the system (or a particular module or page) to behave in a desired way. Each Key has a set of values that correspond to particular behaviors. The organization should determine Configuration Key settings and adjust them as needed.

Review and configure the following before performing the workflows documented in these release notes.

| Ref No. | Key Name |
|---|---|
| 43 | EnableBarcodeScanning |
| 44 | DisplayCDAGSectionInStaffDetails |
| 44 | EnableClinicalDataAccessGrouping |
| 62 | ShowAdditionalQuestionSectionOnCorePHQ9Document |
| 62 | ShowAdditionalQuestionsSectionOnCorePHQADocument |
| 64 | DisplayCDAGSectionInStaffDetails |
| 64 | EnableClinicalDataAccessGrouping |
| 79 | TurnOnCareCoordinationWorkflow |
| 145 | CreateRecurringServicesForPastDates |
| 148 | ALLOWSERVICEERRORWITHPAYMENT |

# Data Model Changes

| Ref No. | Data Model Change |
|---|---|
| 32 | A new column 'ClientOrderId is added to the OrderTemplateFrequencyOverRides table |

# SmartCare Testing Strategy – August 2025 MSP

**Purpose:**
To confirm that key workflows in each module function correctly after the release, focusing on high-impact defect fixes (Core Bugs) to ensure resolved issues work as expected.

## How to Use This Strategy

1. Start with modules you use most often in daily operations.
2. Within each module, test workflows tied to defect fixes.
3. Follow the navigation paths in the release notes for each task.
4. Document:
    a. Pass / Fail outcome
    b. Unexpected behaviors
    c. Follow-up questions or concerns

**Note**: The 🟧 orange icon indicates an **active change**, meaning the update requires customer setup or direct action (such as enabling a new field, adjusting a configuration, or testing a newly introduced workflow) rather than being applied automatically in the system

These testing workflows may vary depending on your organization's specific SmartCare configuration, so be sure to adjust steps as needed to align with your local settings and processes.

# Testing Workflow by Module – Core Bugs Only

### Adhoc Reporting

- 🟧 Core Bugs #132752 – Verify saved reports correctly display under the selected catalog report section list.

### Alerts

- Core Bugs #132561 – Confirm no error occurs when accessing and signing a service note from the Alerts screen.

### Authorizations

- Core Bugs #132763 – Ensure "Review Status" updates properly to Completed in Service Request – Review/Approval Detail.

### Batch Eligibility

- Core Bugs #132653 – Validate mapping between Batch Eligibility Configuration ID and Clearing House ID.

### Batch Services

- Core Bugs #132632 – Confirm all services created from Batch Service Entry are present.
- 🟧 Core Bugs #132890 – Test batch service import to ensure files upload without failure.

### Bedboard

- Core Bugs #132626 – Ensure discharged clients no longer appear on Programs list when both Bed Assignment Activity and Inpatient Activity are deleted.
- Core Bugs #132816 – Test duplicating a bed assignment to confirm expected results.

### Charges/Claims

- Core Bugs #132145 – Verify “Allowed Amount Adjustment” defaults from template plan when not specified.
- Core Bugs #132234 – Validate rounding calculation for adjustments in 835 process.

### Rx Application / Patient Summary

- Core Bugs #132625 – Confirm duplicate instructions no longer display under Medication List.
- Core Bugs #132813 – Validate navigation performance from SmartCare to Rx.
- Core Bugs #132854 – Ensure “X” (Discontinue) button is hidden for SmartCare Orders until completion.
- Core Bugs #132855 – Confirm inactive allergies no longer appear in SmartView “Current Allergies” widget.

### Scanning

- Core Bugs #131096 – Verify Acknowledgement icons function correctly in Scanned and Uploaded Documents.

### Screens / UI Controls

- Core Bugs #132495 – Confirm disabled delete (X) icon in custom grids does not activate for restricted staff/roles.

### Services from Claims

- Core Bugs #132476 – Ensure claim counts remain consistent across MCO-PM Transfer workflow steps.

### Services

- Core Bugs #132282 – Verify accurate procedure rate calculation during service creation.
- Core Bugs #132385 – Confirm status cannot be changed from *Complete* to *No Show* once finalized.
- Core Bugs #132603 – Validate separate Dx code for Add-On services in Primary Care.
- Core Bugs #132635 – Monitor for unexpected “pop-up” of individual services.
- Core Bugs #132699 – Ensure “Upload New Services” pop-up is populated correctly.
- Core Bugs #132765 – Test for absence of “Timeout Expired” errors in ErrorLog table.
- Core Bugs #132785 – Confirm “Failed Services” pop-up works correctly for errors and mass completion.

### Services/Notes

- Core Bugs #132531 – Ensure client name displays when opening a private window from Service Note.
- Core Bugs #132582 – Validate consistent display of client name in private window.
- Core Bugs #132620 – Confirm no JavaScript errors appear in ErrorLogViewer.
- Core Bugs #132706 – Verify GOALOBJECTIVESTATUS Global Code sort order is honored in DFA note.

### SmartCare Improvements

- Core Bugs #132535 – Ensure Export button generates downloads successfully on list pages.
- Core Bugs #132834 – Confirm improvements behave as documented (refer to detail instructions).

### Staff/Users

- Core Bugs #132880 – Validate credentialing grid loads all details in Staff Details screen.
- Core Bugs #132727 – Ensure Export functionality works in Work Groups List Page.

**If a Test Fails:**
Create a **Zendesk** ticket with the module name, task number, detailed steps to reproduce, expected vs. actual results, and attach any relevant screenshots or error messages.

# Revision History

| Version | Description | MSP Version |
|---|---|---|
| 1.0 | Initial Release | August 2025 MSP |