SmartCare™ September 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_1.38.000.2509.001 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' (77)

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
2	Core Bugs # 132995	Users can still continue and successfully log into their account even when the account is set to "Can't Login"	Authentication/Authorization (Login, Logout)
3	Core Bugs # 133078	Service Detail: The billing rule was incorrectly applied to date of services.	Authorizations
4	Core Bugs # 133047	In Service Detail, proper conversion was not happening even when the unit types were different, for example, between minutes and hours.	Authorizations
5	Core Bugs # 123711	Authorizations: The system does not show an error when the 'PM authorization units' used exceed the authorized limit.	Authorizations
6	Core Bugs # 133070	The Batch Eligibility Change Review report incorrectly displays a plan as active, even though it is inactive on the Medicaid website.	Batch Eligibility
7	Core Bugs # 132908	Batch Service Import Failing	Batch Service Import
10	Core Bugs # 132968	Bed Census screen: when the user clicks the 'Status' dropdown, the 'Status' dropdown disappears as soon as the mouse is moved.	Bed Census
11	Core Bugs # 132530	Bundle Code Units incorrectly calculated	Bundle Services
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20	Core Bugs # 129565	Charge Status for voided charges was not correctly updated to "Void" in the Revenue Work Queue Management section's Charge Status dropdown	Charges/Claims
22	Core Bugs # 132937	Segment count mismatch in void claim file.	Charges/Claims
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39	Core Bugs # 133121	Allergy Flag (A/F/I) not displaying next to the medication name in the Order Set tab of the Client Order Screen, even if the medication was marked as an allergy.	Client Orders
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~~45~~	~~Core Bugs # 133186~~	~~Psychosocial Adult/Child List Medication field length~~	~~Core Assessment~~
47	Core Bugs # 133029	Crisis Call Log screen: when the status is completed, users are unable to read the entire contents from Text area.	Crisis Call Log Details
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57	Core Bugs # 133156	Goals/Objectives tab - Objective text boxes cut off	Documents

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60	Core Bugs # 132804	Error message displayed in Services/Notes screen when 'DLA - SUD' document has been incorporated as associated note.	Documents
61	Core Bugs # 133060	Performance issue in 'Agency/Program Discharge' document when client with more than 10 enrolled programs.	Documents
62	Core Bugs # 132960	Medications being discontinued	Documents
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64	Core Bugs # 132807	Hided the form names on the DFA screen tabs that are associated with a Non-DFA screen.	Dynamic Forms (DFA)
65	Core Bugs # 132956	Client MAR: Additional Schedules were created when the Dispense Time is changed in the Order Template Frequency.	e(MAR)
66	Core Bugs # 133114	Client MAR: Editing Administration Times removes the current scheduled dose from screen.	e(MAR)
67	Core Bugs # 133059	An incorrect 'Document Name' displayed when opening 'Linked Document' from 'Flag Alert' Pop-Up window.	Flag Alert Popup
68	Core Bugs # 132919	Flow Sheet screen – Slowness issues in loading the data.	Flow Sheet
70	Core Bugs # 133013	The 'Code Name' of 'MARITALSTATUS' global code category is not sorted based on the value of 'Sort Order'.	Global Code Category
71	Core Bugs # 132863	In the PDF of 'Government Performance and Results Act Outcome Measure' document, the 'Opioid' section items were displayed in 'Alcohol' section.	Government Performance and Results Act (GPRA) Document
72	Core Bugs # 132879	Group Service - Dropdown cuts off selections	Group Details
73	Core Bugs # 133086	Custom Fields dropdowns in Group Notes carry over the selected value between clients.	Group Services

74	Core Bugs # 133038	When the 'Primary Clinician' is changed in the 'Groups', the update did not reflected in the 'Future Group service Documents'.	Group Services
75	Core Bugs # 132661	Group Services – Implemented a new Information message when Group Services with a balance are set to Error.	Group Services
76	Core Bugs # 133093	Group Services – In the Client Note tab for the dropdown fields, the tab off was not working.	Group Services
77	Core Bugs # 132914	Added an index to the Inquiries table.	Inquiry Details
78	Core Bugs # 132612	Performance issue observed while opening Inquiry Details screen from unsaved changes	Inquiry Details
79	Core Bugs # 132901	Staff's Licenses / Degrees tab inconsistent response from system	Manage Staff
80	Core Bugs # 132981	Client Search option disappeared when clicking on 'Client search' icon after merging two clients.	Manage Clients
81	Core Bugs # 133064	Navigating to Messages screen through unsaved changes affected the Reply functionality.	Message (My Office)
~~82~~	~~Core Bugs # 132780~~	~~MAT: When the Frequency Time was changed, duplicate MAT records were created.~~	~~Methadone~~
~~83~~	~~Core Bugs # 132774~~	~~MAT Management list page - Unable to Place a Backdated Client Order for MAT Dispensing.~~	~~Methadone~~
~~84~~	~~Core Bugs # 132979~~	~~MAT Management Details: MAR Details Popup is not displayed on click of 'Dispensed Date & Time' hyperlink from the 'Dispense and No Show History grid'.~~	~~Methadone~~
~~89~~	~~Cire Bugs # 132753~~	~~MAT: The Patient Safety Acknowledgement popup message is displayed only once for the re-dispense.~~	~~Methadone~~
92	Core Bugs # 133024	Updates to Appointments made through Service Detail are not reflected on Staff Calendar.	My Calendar
94	Core Bugs # 133019	Documents cannot be added from the Associate Documents pop-up if the associated Program code contains single quotes (').	My Documents List Page
95	Core Bugs # 132953	ER Claim Lines: Duplicate Payment Rows	My Reports

97	Core Bugs # 132933	The Aging Report is loaded without displaying the relevant data.	My Reports
98	Core Bugs # 133030	My Reports: users are unable to filter reports for specific clients.	My Reports
99	Core Bugs # 133096	UDS Section E - BMI Output Label Change	My Reports
105	Core Bugs # 133025	Unable to run 'Staff Client Access Tracking' report.	My Reports
108	Core Bugs # 132998	The results of Peer Record Reviews always shows 'Acceptable', despite the user's selection of 'No'.	Peer Record Reviews
~~110~~	~~Core Bugs # 133050~~	~~The 'Primary Care Appointments' continued to appear in 'SmartView' even after being cancelled or marked as errors.~~	~~Primary Care~~
112	Core Bugs # 132959	The 'Assigned Staff' name displaying issue on the 'Program Assignment Details' page.	Programs
113	Core Bugs # 131611	Program Assignments: SmartCare allows Discharge dates to be removed from prior Client Program Enrollments when there is an existing enrollment for the same program	Programs
118	Core Bugs # 132894	Misspelling in the 'Free- Text Sig' Pop up for Patches and Suppositories	Rx Application
119	Core Bugs # 133099	'ServiceUnits' column is missing in exported excel.	Services
120	Core Bugs # 132954	New configuration is added to show or hide 'ServiceUnits' column in Export excel file.	Services
134	Core Bugs # 133054	System Not Validating Expired Passwords Correctly	SmartCare Improvements
135	Core Bugs # 133098	Users cannot login to the application	SmartCare Improvements
136	Core Bugs # 133018	Programs in Staff Calendar are not sorting alphabetically	Staff Calendar

Functionality Task Details

Authentication/Authorization (Login, Logout)

Reference No	Task No	Description
2	Core Bugs # 132995	Users can still continue and successfully log into their account even when the account is set to "Can't Login"

Core Bugs # 132995: Users can still continue and successfully log into their account even when the account is set to "Can't Login"

What's Fixed:

We resolved an issue that allowed users to log in even after their account was marked as "Can't Login" due to incorrect answers to security questions.

With this fix, the system now takes the following actions when a user provides incorrect answers on their third attempt:

- Logs the user out immediately
- Displays the message:
  "Your account is disabled. Please contact the system administrator."
- Locks (disables) the account to prevent further access

Where to Find It:
SmartCare Login page

Authorizations

Reference No	Task No	Description
3	Core Bugs # 133078	Service Detail: The billing rule was incorrectly applied to date of services.
4	Core Bugs # 133047	In Service Detail, proper conversion was not happening even when the unit types were different, for example, between minutes and hours
5	Core Bugs # 132711	Authorizations: The system does not show an error when the 'PM authorization units' used exceed the authorized limit.

Core Bugs # 133078: Service Detail: The billing rule was incorrectly applied to date of services

What's Fixed:

We fixed an issue where the system incorrectly applied billing rules to service dates outside the configured StartDate and EndDate range on the Service Detail page. This caused inaccurate billing validation and processing.

With this update, the system now applies billing rules **only** when the service date falls **within** the defined date range, ensuring accurate and reliable billing behavior.

Where to Find It:

Path:

1. Select **Client**
2. Go to **Services (Client)**
3. On the **Services** list page, click **New** or select any **Date of Service (DOS)** hyperlink
   - This opens the **Service Detail** page

Prerequisite:

- The plan must exist with both StartDate and EndDate defined for the rule
- These programs require authorization for the specified codes

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Core Bugs # 133047: In Service Detail, proper conversion was not happening even when the unit types were different, for example, between minutes and hours

What's Fixed:

We fixed an issue where the system failed to convert units correctly on the Service Detail page when services and authorization codes used different unit types—such as hours versus minutes. This mismatch caused incorrect or failed authorization attachments, even when valid units were entered.

With this update, the system now accurately converts between unit types (e.g., minutes to hours), ensuring proper authorization matching and improving billing reliability.

Where to Find It:

Path:

1. Select any **Client**
2. Go to **Services (Client)**
3. On the **Services** list page, click **New** or select any **Date of Service (DOS)** hyperlink
   - This opens the S**ervice Detail** page

Prerequisite:

Ensure that services and authorization codes use the same unit type (either hours or minutes)

Core Bugs # 132711: Authorizations: The system does not show an error when the 'PM authorization units' used exceed the authorized limit

What's Fixed:

We fixed an issue in the Authorizations module that allowed users to attach services even when the PM authorization units exceeded the allowed limit. The system didn't show any warnings, and it didn't adjust unit balances correctly when services were removed or their status changed.

Now, the system checks authorization units before attaching services. If the units aren't available, it shows an error message. It also automatically updates unit balances when a service is removed or its status changes to anything other than Scheduled, Show, or Completed—ensuring accurate tracking.

Where to Find It:

Pre-requisite:

Ensure valid service and authorization records exist with defined unit values.

Path 1:

1. **Client** → **Search** → Select any client
2. **Services** → **Services** list page → Click **New** or select any **DOS** hyperlink
3. **Service Detail** page

Path 2:

1. **My Office** → **Authorizations** → **Authorizations** list page → Click on **ID** hyperlink

Path 3:

1. **Client** → **Search** → Select client
2. **Authorizations** → Click **New** or click on **ID** hyperlink → **Authorization Detail** page

Validation Messages:

- **Authorization Details** Screen → **Services** sub-tab → **Associate Auth with Other Services...**

Message:

"Unable to attach service(s) to the authorization as the service units for selected service(s) exceeds the authorization units available."

- **Service Details Page** → **Authorization(s)** sub-tab → **Attach** button

Message:

"Unable to attach selected authorization to the service as service units exceeds the authorization units available."

Batch Eligibility

Reference No	Task No	Description
6	Core Bugs #133070	The Batch Eligibility Change Review report incorrectly displays a plan as active, even though it is inactive on the Medicaid website.

Core Bugs # 133070: The Batch Eligibility Change Review report incorrectly displays a plan as active, even though it is inactive on the Medicaid website

What's Fixed:

We fixed an issue in the **Batch Eligibility Change Review** report that incorrectly showed a plan as active, even though it was inactive according to the Medicaid website. The system was using service dates from the wrong ID (291) in the 271 response, which caused inaccurate plan status reporting.

Now, the updated stored procedure **`ssp_SCUpdateElectronicEligibilityData_ResponseCoveragePlans`** ignores dates from ID 291. This ensures the report uses only valid service dates and correctly shows whether a plan is active or inactive.

Where to Find It:

My Reports → Batch Eligibility Change Review Report

Batch Service Import

Reference No	Task No	Description
7	Core Bugs # 132908	Batch Service Import Failing

Core Bugs # 132908: Batch Service Import Failing

What's Fixed:

We fixed an issue in the **Batch Service Scheduler** where the system failed to process services correctly if the procedure codes used units other than Minutes, Hours, or Days. This caused file imports to fail and prevented service records from being created.

Now, the system properly handles **non-standard units** during batch imports. It processes files successfully and creates service records as expected, regardless of the unit type.

Where to Find It:

Path:

1. **My Office → Batch Service Import file**
2. Click **Upload Import File**
3. Select the file to upload → Click **Upload**

Bed Census

Reference No	Task No	Description

10	Core Bugs # 132968	Bed Census screen: when the user clicks the ‘Status’ dropdown, the ‘Status’ dropdown disappears as soon as the mouse is moved.

Core Bugs # 132968: Bed Census screen: when the user clicks the ‘Status’ dropdown, the ‘Status’ dropdown disappears as soon as the mouse is moved

What’s Fixed:

We fixed an issue in the **Bed Census** screen that caused the **Status dropdown** to disappear as soon as users moved their mouse, preventing them from selecting the **Admit** option and disrupting the client admission workflow.

Now, the **Status dropdown** stays visible, allowing users to select a value and complete the admission process without interruption.

Where to Find It:
My Office → **Bed Census (Quicklinks)** → **Bed Census** List page → **Status** dropdown → Select **“Admit”** → **Client Search popup** → Select **Client** → **Census Management** → **Admit** screen → **Admit Client** → **Save** and **Close**

Bundle Services

Reference No	Task No	Description
11	Core Bugs # 132530	Bundle Code Units incorrectly calculated

Core Bugs # 132530: Bundle Code Units incorrectly calculated

What’s Fixed:

We fixed an issue where the system incorrectly calculated **Bundle Code service units** during the bundle service job. The units didn’t align with the primary service units, which led to inaccurate tracking.

Now, the system correctly calculates **Bundle Code service units** in sync with the **primary service units** whenever the bundle service job runs, ensuring accurate and consistent unit allocation.

Where to Find It:

Pre-requisite:

- Set the configuration key EnableJobToAutomateBundledServices = Yes

Path 1:

- **Procedure/Rates** quick link → **Administration** → Click **New**
- **Procedure Code Detail** page → Enter required details → **Save**
- Click **Bundle Codes** tab → Select “**Daily”** from **Frequency** dropdown
- Select required **Procedure** from list → **Save**

Path 2:

- **My Office** → **Services** quick link → Click **New**

- **Service Detail** page → Enter required details → **Save**

CCBHC

Reference No	Task No	Description
12	Core Bugs # 132987	ISERV2 Numerator, Denominator, and Average Time are displayed in hours.

Core Bugs # 132987: ISERV2 Numerator, Denominator, and Average Time are displayed in hours

What's Fixed:

We fixed an issue in the **ISERV2 Clinical Quality Measure Results** section where the system incorrectly displayed the **Numerator**, **Denominator**, and **Average Time** fields in **hours** instead of **days**, which caused confusion when interpreting results.

Now, the system correctly displays these fields in **days**, ensuring accurate and clear representation of ISERV2 metrics on the **Clinical Quality Measure Results Detail** screen.

Where to Find It:

Pre-requisite:

A new batch must be created, including a batch for ISERV2.

Path:

1. **My Office** → **Clinical Quality Measure Batch Results**
2. Click on **Measure Name hyperlink for ISERV2**
3. **ISERV Clinical Quality Measure Results Detail screen** → **ISERV2 Clinical Quality Measure Results** section

Charges/Claims

Reference No	Task No	Description
19	Core Bugs # 132902	Claims data missing for void claims - Claims generation error
20	Core Bugs # 129565	Charge Status for voided charges was not correctly updated to "Void" in the Revenue Work Queue Management section's Charge Status dropdown
22	Core Bugs # 132937	Segment count mismatch in void claim file.

Core Bugs # 132902: Claims data missing for void claims - Claims generation error

What's Fixed:

Previously, when users attempted to generate void claims using the 837 Professional format, the system We fixed an issue that prevented users from generating **void claims** using the **837 Professional format**. The system previously displayed the error message:

> *"To Be Voided claim missing claim data. Please contact system administrator."*

This disrupted billing workflows and blocked claim creation.

Now, the system correctly processes **void claims** without triggering errors. Users can follow the standard steps to bill voided claims, and the necessary claim data is included as expected.

Note: This fix applies only to **837 Professional claim files**.

Where to Find It:

Path 1:

1. **My Office** → **Charges/Claims** quick link
2. Select **Charge ID** → Click **E-Claim** icon → Bill the charge
3. Close **Claim Processing** popup → Select billed **Charge ID**
4. Select **Action** dropdown → Mark **Claim Line To Be Voided** → Click **OK**
5. Click **ClaimLine Item ID** hyperlink → **Claim Line Item Detail** screen
6. Enter **Payer Claim Number** in **Claim Details** tab → **Save**
7. Go to **Charges/Claims** → Select same **Charge ID** → Click **E-Claim**
8. Click **Process Now** → Create **Claim File** → **Save As**
9. Uncheck **"Created Correctly"** checkbox → Close popups
10. Select same **Charge ID** → Click **E-Claim** → **Process Now** → Create **Claim File** → **Save As**

Path 2 (Alternate):

1. Follow steps 1–8 from Path 1
2. Uncheck **"Created Correctly"** checkbox → Close **Claim File Creation** popup
3. Select batch from dropdown → Click **Delete Batch** → Close popup
4. Select same **Charge ID** → Click **E-Claim** → Process Now

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Core Bugs # 129565: Charge Status for voided charges was not correctly updated to "Void" in the Revenue Work Queue Management section's Charge Status dropdown

What's Fixed:

We fixed an issue where the system didn't update the **Charge Status** to "Void" in the **Revenue Work Queue Management** section when users voided a claim using the **Mark Claim Line To Be Voided** option. This made it hard to track the true status of voided charges and caused confusion during billing follow-up.

Now, the system correctly updates the **Charge Status** to "Void" when a claim is marked as voided. It also updates the status appropriately if the charge is **re-billed** or **partially paid**, ensuring accurate tracking.

Where to Find It:

Path:

1. **My Office** → **Charges/Claims** → Select a charge → Click the **E-Claim** icon → Bill the charge
2. In the **Charges/Claims** list, select the same charge → Use **Select Action** → Choose **Mark Claim Line To Be Voided** → Confirm

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3. Click the **Claim Line Item ID** hyperlink → Enter the **Payer Claim Number** in the **Claim Details** tab → Save
4. Return to **Charges/Claims** → Select the charge again → Click **E-Claim** to re-bill if needed
5. Open the **Charge Details** screen → In the **Revenue Work Queue Management** section, verify the **Charge Status** dropdown reflects the correct status (e.g., Void, Claim Sent, Partially Paid)

Example Status Flow:

- Service Created → Status: **Charge Created**
- Billed → Status: **Claim Sent**
- Marked as Voided → Status: **Void**
- Re-billed → Status: **Claim Sent**
- Partial Payment Applied → Status: **Partially Paid**
- Marked as Voided Again → Status: **Void**
- Re-billed Again → Status: **Partially Paid**

Note: This logic applies only to **Void 837P** and **HCFA 1500** claims.

Core Bugs # 132937: Segment count mismatch in void claim file

What's Fixed:

We fixed an issue where the system incorrectly calculated the **segment count** in the **SE segment** when generating a **void claim file**. It added +1 to the actual count, causing a mismatch that could lead to validation or submission errors.

Now, the system calculates the **SE segment count** correctly when creating a void claim file, ensuring accurate and compliant claim file generation.

Where to Find It:

Pre-requisite:

Select a client, complete a service, and create a claim file.

Path:

1. **My Office** → **Charges and Claims** → Select **Charge**
2. Click on **Claim Line Item ID** → **Claim Line Item Detail** screen
3. Check **"To be voided"** checkbox → Add **Payer Claim Number** under **Claim Details** tab
4. Navigate back to **My Office** → **Charges and Claims** → Select **Charge**
5. Click **Electronic Claim** button → **Claims Processing** popup → Click **Process Now** to create the claim file

Client Document List Page

Reference No	Task No	Description
28	Core Bugs # 133043	Performance issue in Client 'Documents' screen

Core Bugs # 133043: Performance issue in Client 'Documents' screen

We improved the **Documents** screen in the **Client** module to resolve performance issues. Previously, the page took longer than expected to load, which slowed down workflows and impacted usability.

Now, the system loads data efficiently without delays, providing a smoother and faster user experience.

Where to Find It:

Path:

Client → Documents → Documents list page

Client eMAR

Reference No	Task No	Description
29	Core Bugs # 133063	Client MAR: Administration Events not functioning as expected for MAT Take home medications

Core Bugs # 133063: Client MAR: Administration Events not functioning as expected for MAT Take home medications

What's Fixed:

We resolved a critical issue in the **Client MAR screen** where **MAT Take Home medications** didn't display split doses for **Face-to-Face** and **Take Home** administrations as separate entries. Icons were also missing, making it hard to track and manage these doses.

With this fix, the system now:

Adds Validation Messages:

- When signing an MAT order with a question at administration or a **Standing Administered Once** schedule:
- *"[Order Name] - MAT orders are not allowed to have questions that need to be answered during the administration. Please modify the Order Setup or choose a different order."*
- When signing an MAT order with a **Standing Administered Once** schedule:
    - *"[Order Name] - Standing Administered Once is not allowed for MAT Orders."*
- When **DualSignRequired** is enabled for an MAT order:
    - *"[Order Name] - MAT orders are not allowed to have DualSignRequired option enabled. Please modify in the Order Setup or choose a different order."*

Improves Visual Tracking:

- Displays the **capsule icon** for MAT medications both inside and outside the administration window
- Adds a new status: **"Received Take Home"** in the administration popup dropdown for MAT medications

Where to Find It:

Path 1:

1. Go to **Administration** → **Orders**
2. Click **New** → Fill required fields
3. Select **Medication Order Type**
4. Choose **Standing Administered Once** under **Schedule**
5. Set **MAT, Machine Connection Required,** and **Take Home Allowed** to **Yes**
6. Enable **DualSignRequired**

7. Select **Administration** under **Questions** → **Save**

Path 2:

1. Go to **My Office** → **Medication/Lot/Bottle** list page
2. Click **New** → Fill required fields → Enter **Location** → **Insert** → **Save**

Path 3:

1. Go to **Client** → **Client Orders**
2. Click **New** → Select the created order
3. Fill required fields → Select **Take Home** days → Choose **Program** → **Insert** → **Save** → **Sign**

Path 4:

1. Go to **Search** → **MAT Management (My Office)**
2. Click **Dispense** icon for required medication
3. **Dispense Face-to-Face** and **Take Home** doses

Path 5:

Go to **Client** → **Client MAR**

Client Flags

Reference No	Task No	Description
62	Core Bugs # 133039	‘Client Flag Details’ screen: Level Global Code drop-down is not honoring SortOrder.

Core Bugs #133039: ‘Client Flag Details’ screen: Level Global Code drop-down is not honoring SortOrder

What’s Fixed:

The system previously displayed the “Level” drop-down options on the Client Flag Details and Flag Type Details screens in alphabetical order, ignoring the custom SortOrder defined in the Global Codes under the category CLIENTNOTELEVEL.

Now, the system correctly displays the Level drop-down options according to the defined SortOrder in the Global Codes.

Where to Find It:

- **Administration** → **Global Codes** → **Global Codes** list page
  - Select category: **CLIENTNOTELEVEL** → **Modify/Add SortOrder** → **Save**
- **Client** → **Client Flags** → **Client Flags** list page
  - Click on **New** → **Client Flag Details** screen → **Level** drop-down
- **My Office** → **Client Flags** → **Client Flags** list page
  - Click on **New** → **Client Flag Details** screen → **Level** drop-down
- **My Office** → **Patient Lists/Reminders**
  - Select client → **Action Dropdown: Create Client Flag** → **Flag Details Popup** → **Level** drop-down
- **Administration** → **Flag Types**
  - Select existing flag or click **New** → **Flag Type Details** screen → **Level** drop-down

Client Orders

Reference No	Task No	Description
33	Core Bugs # 132921	Duplicate Lab Results are displayed in the 'Lab Results Review' screen.
34	Core Bugs # 132745	Client Orders: In the 'Discontinued Titration Orders' PDF, the end time is not displayed.
35	Core Bugs # 132746	Client Orders: Inconsistent display of A/F/I next to the medication name and in grid.
36	Core Bugs # 132963	The Order Name Display Format on Client Order List Page is updated.
37	Core Bugs # 132988	Services: Service Not Being Created from Lab Order
38	Core Bugs # 133009	Medications List Page: When the user clicks the 'Export' icon, the data is not being exported.
39	Core Bugs # 133121	Allergy Flag (A/F/I) not displaying next to the medication name in the Order Set tab of the Client Order Screen, even if the medication was marked as an allergy.

Core Bugs # 132921: Duplicate Lab Results are displayed in the 'Lab Results Review' screen

What's Fixed:

The Lab Results Review screen previously displayed duplicate lab results when users added multiple attachments to a lab order in the Attachments tab of the Client Order Details screen. Now, the screen correctly displays each lab result only once, even if users add multiple attachments to the order.

Where to Find It:

Path 1:

Administration → **Orders** → **Orders** list → **New** → Select **"Lab"** from **Order Type** → Enter required fields → **Save**

Path 2:

Client → **Client Orders** → **New** → Select the **Lab Order** created in Path 1 → Enter required fields → **Insert** → **Save/Sign**

Path 3:

Client → **Client Orders** → Select the **Lab Order** → **Lab Results** tab → Add lab results → **Save**

Path 4:

Client → **Client Orders** → Select the **Lab Order** → **Attachment** tab → Add attachments → **Save**

Path 5:

Client → **Lab Results Review** → **Lab Results Review** screen

Core Bugs # 132745: Client Orders: In the 'Discontinued Titration Orders' PDF, the end time is not displayed

What's Fixed:

We resolved an issue where the PDF for Discontinued Titration Orders did not display the End Time. Previously, the End Date Time appeared correctly for the first step, but only the End Date was shown for the second step, resulting in incomplete documentation.

With this fix, the PDF now correctly displays the End Date Time for all steps when a Titration Order is discontinued, ensuring complete and accurate time tracking.

Where to Find It:

Path 1:

1. Go to **Search** → **Client Orders (Client)**
2. Click on **New** icon
3. Fill in required details → **Sign**

Path 2:

1. Go to **My Client** → **Client Orders (Client)**
2. Click on **New** icon
3. Select the created order → **Discontinue** → **PDF**

Core Bugs # 132746: Client Orders: Inconsistent display of A/F/I next to the medication name and in grid

What's Fixed:

We corrected an issue in the Client Order Details screen where the flags for Allergy (A), Intolerance (I), and Failed Trial (F) were not consistently displayed next to medication names or within the grid across the Order, Order Set, and Preference tabs. This inconsistency impacted visibility and acknowledgment workflows.

With this update, the A/I/F flags now reliably appear next to the corresponding medications and within the grid upon insertion. For medications marked as Complete or Discontinued, the flags no longer appear under the Interaction column, and acknowledgment validations are no longer triggered.

Pre-requisites:

1. Add Allergy, Intolerance, and Failed Trial medications to the **Order Sets**.
2. Add the same medications to the client via **Client Allergies**.

Where to Find It:

Path:

1. **Client** → **Go Search** → **Client Orders** → **New**
2. **Client Order Details** → **Order Set** tab → Search and select **Allergy Medication Order Set**
3. Enter all required fields → **Insert** → **Save** → **Sign**

Core Bugs # 132963: The Order Name Display Format on Client Order List Page is updated

What's Fixed:

We updated the medication order naming format to resolve confusion that occurred when the strength was a number and the dosage description was set to Tablet or Capsule. Previously, the order name appeared in a format like:

Acetylcysteine CAP 500*30 MG

This format combined strength and dose in a way that could be misinterpreted.

With this update, the order name now displays clearly and consistently as:

Acetylcysteine CAP 30MG

Where to Find It:

Path 1:

Administration → **Orders** → **Orders** list → **New** → Select **"Medication"** as **Order Type** → Enter numeric strength and select **Tablet/Capsule** → **Save**

Path 2:

Client → **Client Orders** → **New** → Select the order created in Path 1 → Enter required fields → **Insert** → **Save/Sign**

Path 3:

Client → **Client Orders** → **Client Orders** list → View updated order name in the **Name** column

Path 4:

Client → **Client Orders** → **New** icon → **Client Order Selection** popup → View updated format in the **Order** column

Path 5:

Client → **Orders (My Office)** → View updated format in the **Order** column

Core Bugs # 132988: Services: Service Not Being Created from Lab Order

What's Fixed:

We fixed an issue where the system failed to create services from Lab Orders, even after users signed the Client Order. This problem disrupted workflows and prevented expected service records from being generated for lab-related procedures.

With this fix, the system now correctly creates services for signed Client Orders where the Order Type is set to Lab, ensuring proper linkage between lab orders and service records.

Where to Find It:

Path 1:

1. **Administration** → **Procedure/Rates** → **Procedure/Rates** list page → **New**

2. **Procedure Code Details** screen → Select **"Order Procedure Code"** checkbox
3. Uncheck **"This code is not billable"** → Enter required fields → **Save**

Path 2:

1. **Administration** → **Orders** → **Orders** list page → **New**
2. **Order Details** screen → Select **"Lab"** as **Order Type**
3. Enter **Procedure Code** → Select **"Yes"** for **Billable** and **Display Program** → Enter required fields → **Save**

Path 3:

1. **Client** → **Client Orders** → **Client Orders** list page → **New**
2. Client **Order Details** screen → Select the **Lab Order** created above
3. Enter required fields → **Insert** → **Save** → **Sign**

Path 4:

Client → **Services** → **Services** list page

Core Bugs # 133009: Medications List Page: When the user clicks the 'Export' icon, the data is not being exported

What's Fixed:

We fixed an issue where clicking the Export icon on the Medications List page did not trigger a download, preventing users from saving or sharing medication records outside the system.

With this update, clicking the Export icon now successfully generates and downloads the medication data in Excel format, as expected.

Where to Find It:

Path:
Client → **Search** and select a client → **Medication** → **Medications List** page → Click the **Export** icon

Core Bugs # 133121: Allergy Flag (A/F/I) not displaying next to the medication name in the Order Set tab of the Client Order Screen, even if the medication was marked as an allergy

What's Fixed:

We resolved an issue where the Allergy Flag (A/F/I) did not appear next to the medication name in the Order Set tab of the Client Order screen, even when the medication was marked as an allergy.

With this fix, the Allergy Flag now correctly appears when users select the **Set Default** button and enable the **Enable Default** checkbox, or when they modify medication attributes with **Enable Default** enabled during Order Set creation.

Where to Find It:

Path 1:
Client → **Client Allergies** → Enter medication in **Current Medication** section → **Save** → **Open Rx** → **Prescribe** medication → **Medication Reconciliation** → **Sign**

Path 2:
Search → **Order Sets** → **Search** medication → **Save** → Select **Enable Default** checkbox → Click **Default** → Enter required details → **Save**

Path 3:
Client → **Client Orders** → **New** → **Client Orders Details** → **Order Set** tab → Search for created Order Set

Client Search Popup

Reference No	Task No	Description
40	Core Bugs # 132912	All Client Search - The Staff is able to see restricted clients for 'Broad search' but once after 'All Client Search' button is clicked.

Core Bugs #132912: All Client Search - The Staff is able to see restricted clients for 'Broad search' but once after 'All Client Search' button is clicked

What's Fixed:

We fixed an issue that allowed staff with restricted client access permissions to view restricted clients during a Broad Search after clicking the **All Client Search** button. This behavior violated access control rules and exposed sensitive client data to unauthorized staff.

With this update, the system now consistently enforces access restrictions. Staff can no longer view restricted clients during Broad Search, regardless of whether they click the **All Client Search** button. Only clients permitted under the configured access rules are visible.

Where to Find It:

Pre-requisite:

1. **Go Search** → **Administration** → **Staff/User** → Select required staff
2. **Staff Details** screen → **Roles/Permissions** tab
3. Select **"Client Access Rules"** in **Permission Type** dropdown
4. Grant permission only for **"Clinician in Program which Shares the Client"**
5. **Deny** all other **Client Access Rule** permission items

Path:

1. **Client** → **Client Search** popup
2. Enter **First Name, Last Name, SSN, DOB** → Click **All Client Search** button
3. Click **Broad Search** button

Clinical Documentation

Reference No	Task No	Description
42	Core Bugs # 130046	Initialization Editor: On Save the Validation message for 'Generate Query' is not displayed consistently.

Core Bugs # 130046: Initialization Editor: On Save the Validation message for 'Generate Query' is not displayed consistently

What's Fixed:

We resolved an issue where the **'Generate Query'** validation message did not consistently appear on the Initialization Editor screen after users clicked **Save**. This inconsistency prevented the system from generating the query in the Preview tab, even when users completed the required table and column mappings.

With this fix, once users complete the necessary mappings and click **Save**, the system reliably generates the query in the Preview tab. If users make no changes to the mappings, the system displays the previously saved or generated query without regenerating it.

Where to Find It:

Path:

1. Go to **Administrator**
2. Search for **Initialization**
3. On the **Initialization** list page, click the **New** icon
   - This opens the **Initialization Editor** screen

CM Events

Reference No	Task No	Description
44	Core Bugs # 132723	Enrollment Form Event: Saving twice on the Upload Image Details screen deletes the Event records.

Core Bugs # 132723: Enrollment Form Event: Saving twice on the Upload Image Details screen deletes the Event records

What's Fixed:

We resolved a customer-specific issue where saving twice on the **Upload Image Details** screen within an **Enrollment Form Event** caused the system to soft delete the associated **Document** and **Document Version** records from the database. This deletion made the event inaccessible from the list page.

With this fix, saving twice no longer deletes event records. The system now correctly passes the **DocumentCodeId** to the **Record Type** field when users navigate from the Enrollment Form Event. The field remains disabled to ensure the correct value is used automatically, preventing manual errors and preserving event accessibility.

Where to Find It:

Path:

1. Go to **Client** → **CM Events**
2. Select event type: **Enrollment Form Event**
3. Set status to **In-Progress, Insurer, or Provider**
4. Click on **Note** tab → **Save**
5. Click on **Attachments** tab → **Upload** → **Image Upload** → **Select** → **Upload** → **Save** twice

Note:

This issue was customer-specific

Core Assessment

Reference No	Task No	Description
~~45~~	~~Core Bugs # 133186~~	~~Psychosocial Adult/Child List Medication field length~~

~~Core Bugs # 133186: Psychosocial Adult/Child List Medication field length~~

~~**What's Fixed:**~~

~~We resolved an issue in the **Assessments (C)** document under the **Psychosocial Adult/Child** tab where the **Medication Name** field in the **List of Medications** section was limited to 11 characters. This restriction prevented users from entering full medication names, which impacted documentation accuracy.~~

~~With this fix, users can now enter more than 11 characters in the **Medication Name** field, allowing for complete and accurate medication entries.~~

~~**Where to Find It:**~~

~~**Path:**~~

1. ~~**Client → Assessments (C) document**~~
2. ~~Select required input to display **Psychosocial Adult/Child** tab~~
3. ~~**Medication** section → Select **List of Medication** radio button~~
4. ~~Add required details → **Save** → **Sign**~~

Crisis Call Log Details

Reference No	Task No	Description
47	Core Bugs # 133029	Crisis Call Log screen: when the status is completed, users are unable to read the entire contents from Text area.

Core Bugs # 133029: Crisis Call Log screen: when the status is completed, users are unable to read the entire contents from Text area

What's Fixed:

We resolved an issue on the **Crisis Call Log** screen where users couldn't view the full contents of the **Crisis Information** text area after setting the status to **Complete**. The system disabled all fields upon completion, which restricted visibility of the entered text.

With this fix, users can now view the entire text in the **Crisis Information** section, even when the status is marked as **Complete**.

Where to Find It:
My Office → Crisis Call Log (My Office) → New → Crisis Call Log Details → Client Information (Potential)

Documents

Reference No	Task No	Description

~~48~~	~~Core Bugs # 132520~~	~~CAFAS standalone connection issues with FAS~~
~~50~~	~~Core Bugs # 132938~~	~~ISP document: Initialization issue~~
51	Core Bugs # 132586	Spellcheck not working in Standard Mental Status Exam
52	Core Bugs # 132878	Incorrect Signature Details Displayed for Version Author
54	Core Bugs # 133008	When right-clicking a misspelled word, the previously typed text disappears.
~~56~~	~~Core Bugs # 133046~~	~~Significant Issue with the 'Individualized Service Plan' document.~~
57	Core Bugs # 133156	Goals/Objectives tab - Objective text boxes cut off
~~59~~	~~Core Bugs # 132438~~	~~Getting an error while clicking on "Go to Online Cafas" and "Import CAFAS Scores" in the 'CAFAS Standalone'.~~
60	Core Bugs # 132804	Error message displayed in Services/Notes screen when 'DLA - SUD' document has been incorporated as associated note.
61	Core Bugs # 133060	Performance issue in 'Agency/Program Discharge' document when client with more than 10 enrolled programs.
62	Core Bugs # 132960	Medications being discontinued
63	Core Bugs # 133143	Issues with "Medication Reconciliation" Document Functionality

~~Core Bugs # 132520: CAFAS standalone connection issues with FAS~~

~~We resolved an issue that caused connection errors when users tried to access **CAFAS Online** or import scores from **FAS** within a standalone CAFAS document. The system displayed the following error message:~~

~~*"Unable to find CAFAS for the current client; please go to online CAFAS."*~~

~~This disrupted workflows and prevented users from completing CAFAS assessments efficiently.~~

~~With this fix, users can now successfully access **Online CAFAS** and import scores without encountering error messages, ensuring a smoother and more reliable experience.~~

~~**Where to Find It:**~~

~~**Path:**~~

1. ~~Open **Client**~~
2. ~~Create or open a **New CAFAS** document~~
3. ~~Click on **Go to Online CAFAS or Import CAFAS Scores**~~

~~Core Bugs # 132938: ISP document: Initialization issue~~

~~**What's Fixed:**~~

~~We resolved an issue in the **Individualized Service Plan (ISP)** document where certain fields failed to initialize correctly when users created a new ISP based on a previously signed one. This occurred when a **DFA tab** was mapped to the ISP document, resulting in missing data across multiple tabs.~~

~~With this fix, the system now correctly initializes the following fields from the previously signed ISP into the new document:~~

- ~~**General Tab**~~
  - ~~Strength~~
  - ~~Transition/Level of Care/Discharge Plan section~~
- ~~**Needs Tab**~~
  - ~~Deferral Reason~~
- ~~**Interventions Tab**~~
  - ~~Details within each checked intervention~~
- ~~**Supports/Treatment Program Tab**~~
  - ~~Review Dates Comments~~

~~This update ensures continuity and accuracy when users create new ISP documents.~~

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

~~Ensure a DFA tab is mapped to the ISP document.~~

~~**Where to Find It:**~~

~~**Path:**~~

1. ~~Create a **Client**~~
2. ~~Navigate to **Individualized Service Plan (Client)**~~
3. ~~Enter all required fields across tabs → Sign the document~~
4. ~~Click **New** → Verify data initialization from the previously signed ISP document~~

Core Bugs # 132586: Spellcheck not working in Standard Mental Status Exam

We fixed an issue on the **Mental Status Exam** screen where the spell checker pop-up failed to appear, making it difficult for users to catch and correct spelling errors during documentation.

With this update, the spell checker now displays correctly and functions as intended.

Where to Find It:

Path:
Login → **Quick Search** → Select **Client** → **Mental Status Exam**

Core Bugs # 132878: Incorrect Signature Details Displayed for Version Author

What's Fixed:

We resolved an issue where the system incorrectly displayed the original author's name in the signature details when users edited and signed a new version of a document. This occurred when the configuration **DocumentSignaturesNoPassword = "Yes"** and the database setting **AllowVersionAuthortoSign = "Y"** were enabled, resulting in inaccurate attribution.

With this fix, the system now correctly displays the current version author's name in the signature details. A conditional check ensures that when **AllowVersionAuthortoSign = "Y"**, the system assigns the **LoggedInUser** as the **SignerId** during the signature update process.

Pre-requisites:

1. Set system configuration key:

   Login to SmartCare → Administration → Configuration Keys → DocumentSignaturesNoPassword = "Yes"

2. Set database value:

   DocumentCode → AllowVersionAuthortoSign = "Y"

Where to Find It:

Path:

1. Login to SmartCare application
2. **Client** → **Search** for any document via **Go Search**
3. Fill in all required details → Sign the document
4. Login with a different author → Edit the signed document → Create a new version

Core Bugs # 133008: When right-clicking a misspelled word, the previously typed text disappears

What's Fixed:

Previously, when users entered text in the **Goals/Objectives** section of the **Individual Service Plan (ISP)** and used Microsoft Edge's built-in spell check to correct a word, the entire text area would unexpectedly clear. This caused users to lose their typed content and revert to previously saved text.

Users can now safely use Edge's spell check feature without losing any of their work. The Objective text area retains all entered content, even after correcting spelling errors.

Where to Find It:

Path:
Client → Search and select a client → **Individual Service Plan** → **Goals/Objectives** tab → Enter text → **Save** → **Sign**

~~Core Bugs # 133046: Significant Issue with the 'Individualized Service Plan' document~~

~~**What's Fixed:**~~

~~We fixed an issue where the **DFA** tab mapped to the **Individualized Service Plan** document was incorrectly replaced by the **Cost** tab. This happened because the system hid Tab IDs 6 (**Medication**) and 7 (**Cost**) by default. Since the DFA tab was also assigned Tab ID 6, it was unintentionally hidden along with the Medication tab, leaving only the Cost tab visible.~~

~~With this release, the system now uses **Tab control names** instead of hardcoded Tab IDs to manage visibility. This change ensures the DFA tab displays correctly when mapped to the Individualized Service Plan document, while the Medication and Cost tabs are shown or hidden based on their configuration.~~

~~**Prerequisite:**~~

~~The DFA tab must be mapped to the Individualized Service Plan document.~~

~~**Where to Find It:**~~

- ~~**Administration** → **Document Codes** → Search for **'Care Plan'** → **Apply Filter** → **Individualized Service Plan Details** → **Configurable Tabs** → Uncheck **'Medication'** and **'Cost'**~~
- ~~**Create a Client** → Navigate to **Individualized Service Plan (Client)** → Verify **DFA tab** is displayed correctly~~

Core Bugs # 133156: Goals/Objectives tab - Objective text boxes cut off

What's Fixed:

We fixed an issue in the **Individualized Service Plan** where the text boxes for **Staff Supports / Service Details**, **Interventions**, **Client Actions**, and **Use of Natural Supports** were cut off in the UI after users added an objective to a goal. The lack of a horizontal scroll option prevented users from viewing or entering the full text.

With this update, all relevant text boxes in the **Goals/Objectives** tab are now fully visible, allowing users to view and enter complete information without any cutoff.

Where to Find It:

- **Client Search → Individualized Service Plan (Client) → Goals/Objectives** tab

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~~Core Bugs # 132438: Getting an error while clicking on "Go to Online Cafas" and "Import CAFAS Scores" in the 'CAFAS Standalone'~~

~~**What's Fixed:**~~

~~We fixed an issue in the **CAFAS Standalone** document that caused an error when users clicked the **Go to Online CAFAS** or **Import CAFAS Scores** buttons. The system displayed the message:~~

> ~~*"Unable to find CAFAS for the current client, please go to online CAFAS."*~~

~~This error prevented users from accessing or importing CAFAS scores as intended.~~

~~With this update, users can now successfully navigate to **Online CAFAS** and import scores without encountering any error messages.~~

~~**Where to Find It:**~~

~~**Path:**~~

1. ~~**Client → CAFAS Standalone → CAFAS Standalone document**~~
2. ~~Click **Go to Online CAFAS** button~~
3. ~~Click **Import CAFAS Scores** button~~

Core Bugs # 132804: Error message displayed in Services/Notes screen when 'DLA - SUD' document has been incorporated as associated note

What's Fixed:

We resolved an issue on the **Services/Notes** screen where the system displayed an error message when users incorporated the **DLA - SUD** document as an **Associated Note** through a selected procedure code. This error prevented users from saving or signing the note successfully.

With this fix, users can now **Save**, **Validate**, and **Sign** the Services/Notes screen without encountering errors when using the **DLA - SUD** document as an associated note. The system now correctly handles the dataset merge process, ensuring a smooth workflow and successful PDF generation.

Where to Find It:

Path:

1. Go to **Client** → **Services/Notes** list page
2. Click **New**
3. Select a **Program** from the dropdown
4. Choose a Procedure mapped to DLA - SUD as an Associated Note
5. Select a **Location**
6. Go to the **Note** tab → Fill required details → Click **Save**
7. Complete remaining fields → **Sign** → **PDF** is generated

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Core Bugs # 133060: Performance issue in 'Agency/Program Discharge' document when client with more than 10 enrolled programs

What's Fixed:

We fixed a performance issue in the **Agency/Program Discharge** document that occurred when users attempted to discharge clients enrolled in more than 10 programs. The screen loaded slowly and often displayed a **"Page Unresponsive"** popup, making it difficult to complete the discharge process.

With this update, the document is now optimized for better performance. Users can successfully perform **Program Discharge** actions for clients with multiple program enrollments, sign the document, and generate the **Agency/Program Discharge PDF** without delays or system interruptions.

Pre-requisite:

Client must be enrolled in more than 10 programs via the Program Assignment screen.

Where to Find It:

Path:

1. Client → **Agency/Program Discharge** → **Agency/Program Discharge** document
2. Select **Program Discharge** radio button → Select **Discharge** for applicable programs
3. Click **Save** → Click **Validate**

Core Bugs # 132960: Medications being discontinued

What's Fixed:

We resolved an issue in the Medication Reconciliation workflow that caused newly prescribed medications to be incorrectly discontinued when users failed to click the Refresh button before signing the document. These medications also did not appear in the Discontinued Medications section of the PDF.

With this fix, the system now retains newly prescribed medications via Open Rx and correctly displays them in the PDF—even if users do not click the Refresh button before signing.

Where to Find It:
Client → **Medication Reconciliation** → **New** → Select checkbox for required medication in **Current Medication** section → **Save** → Click **Open Rx** → **Prescribe** medication → Return to **Medication Reconciliation** → **Sign**

Core Bugs # 133143: Issues with "Medication Reconciliation" Document Functionality

What's Fixed:

We resolved an issue in the Medication Reconciliation document that caused incorrect behavior when users selected medications for discontinuation. The system was:

- Automatically deselecting medications that users had selected
- Automatically selecting medications that users had not chosen

With this fix, users can now accurately select medications for discontinuation, and they can sign the document without encountering errors.

Where to Find It:
Client → **Medication Reconciliation** → **New** → Select checkbox for required medication in **Current Medication** section → **Sign**

Dynamic Forms (DFA)

Reference No	Task No	Description
64	Core Bugs # 132807	Hided the form names on the DFA screen tabs that are associated with a Non-DFA screen.

Core Bugs # 132807: Hided the form names on the DFA screen tabs that are associated with a Non-DFA screen

What's Fixed:

We resolved an issue where the system incorrectly displayed form names from Non-DFA Document screens on DFA form tabs. This caused confusion for users navigating documents that weren't intended to show DFA-related forms.

With this fix, the system now hides form names linked to Non-DFA screens from DFA form tabs, providing a cleaner and more accurate user interface.

Where to Find It:

Path:

1. Login to SmartCare application
2. Go to **Client** → **Documents**
3. Select any document associated with a DFA form tab

e(MAR)

Reference No	Task No	Description
65	Core Bugs # 132956	Client MAR: Additional Schedules were created when the Dispense Time is changed in the Order Template Frequency.
66	Core Bugs # 133114	Client MAR: Editing Administration Times removes the current scheduled dose from screen.

Core Bugs # 132956: Client MAR: Additional Schedules were created when the Dispense Time is changed in the Order Template Frequency

What's Fixed:

We resolved an issue where modifying the dispense time in the Order Template Frequency caused the nightly job **ssp_CreateMARDetails** to create additional MAR schedules in the Client MAR screen. This duplication occurred whether the change was made through the UI or via the primary synchronization process.

The **ssp_CreateMARDetails** procedure now behaves as follows:

- It updates MAR schedules to reflect the new dispense time from the Order Template Frequency.
- It removes and recreates only future MAR dispenses using the updated time, ensuring accuracy and preventing duplication.

Prerequisites:

1. Create a Non-PRN Frequency in the Order Template Frequency Details screen.
2. Sign Client Orders using the frequency created in step 1.

Where to Find It:

- **Client → Client MAR**

Core Bugs # 133114: Client MAR: Editing Administration Times removes the current scheduled dose from screen

What's Fixed:

We resolved an issue where editing administration times in the Client MAR screen caused the current scheduled dose—indicated by the pill icon—to disappear. This happened even when users reverted to the default administration times, disrupting medication tracking.

With this fix, the scheduled dose remains visible after users edit administration times, including when they revert to default settings. Additionally, we added a new information icon to the Dispense Time popup. When hovered over, it displays the message:

"MAR Only: Past dispense times cannot be updated for today. Changes apply to future dispense times only."

Prerequisites:

1. A Non-PRN Frequency must be created in the Order Template Frequency Details screen
2. Client Orders must be signed using the frequency created in step 1

Where to Find It:

Path:

1. Go to **Client**
2. Select **Client MAR**

Flag Alert Popup

Reference No	Task No	Description
67	Core Bugs # 133059	An incorrect 'Document Name' displayed when opening 'Linked Document' from 'Flag Alert' Pop-Up window.

Core Bugs # 133059: An incorrect 'Document Name' displayed when opening 'Linked Document' from 'Flag Alert' Pop-Up window

What's Fixed:

We resolved an issue where the system displayed an incorrect Document Name when users opened a Linked Document from the Flag Alert pop-up window. This occurred when users selected a client via search, leading to confusion and misidentification of the associated document.

With this fix, the system now displays the correct Document Name when users click the **Open** hyperlink in the Linked Document column of the Flag Alert pop-up, ensuring accurate document identification and an improved user experience.

Where to Find It:

Path 1:

1. Go to **Client** → **My Preferences**
2. Under **General Settings,** set **Client Page Preferences** to **Documents**

Path 2:

1. Perform a **Client Search** → Select a client
2. In the **Flag Alert** pop-up window, click **Open** in the **Linked Document** column
3. The correct document will open with the proper **Document Name** displayed

Flow Sheet

Reference No	Task No	Description
68	Core Bugs #132919	Flow Sheet screen – Slowness issues in loading the data.

Core Bugs # 132919: Flow Sheet screen – Slowness issues in loading the data

What's Fixed:

We resolved a performance issue in the Flow Sheet screen that caused significant delays when loading data—especially after users navigated through the Vital History tab and selected templates like Meaningful Use or Vitals. These delays impacted user efficiency and overall system performance.

With this fix, the Flow Sheet screen now loads data promptly without lag, improving the user experience during data entry and review.

Where to Find It:

Path:

1. Perform **Client Search**
2. Select **Client**
3. Navigate to **Flow Sheet Quick Link**
4. **Client Menu** → **Flow Sheet List Page**
5. **Vital History** tab → Select **Meaningful Use/Vitals** template
6. Add **Flow Sheet** dropdown filter → Click **New** Icon
7. New **Entry Flow Sheet Detail** page → Enter required fields → Click **Save** Icon

Global Code Category

Reference No	Task No	Description

70	Core Bugs # 133013	The ‘Code Name’ of ‘MARITALSTATUS’ global code category is not sorted based on the value of ‘Sort Order’.

Core Bugs #133013: The ‘Code Name’ of ‘MARITALSTATUS’ global code category is not sorted based on the value of ‘Sort Order’

What’s Fixed:

We resolved an issue where the system displayed Code Names in the **MARITALSTATUS** global code category alphabetically instead of using the configured Sort Order. This caused inconsistencies in dropdown selections across multiple screens.

With this fix, the Marital Status dropdown now follows a two-level sorting logic:

- **Primary Sorting by Sort Order** – The system orders Code Names based on the value in the Sort Order field.
- **Secondary Sorting Alphabetically** – If multiple Code Names share the same Sort Order value, the system sorts them alphabetically.

This update ensures a consistent and logical display of marital status options across all relevant screens.

Where to Find It:

Path 1:

1. Go to **My Office** → **Inquiries**
2. Click **New** → Navigate to **Inquiry Details** → **Demographics** tab → **Marital Status** dropdown

Path 2:

1. Go to **Client** → **Client Information (C)**
2. Navigate to **Demographics** tab → **Marital Status** dropdown

Path 3:

1. Go to **Client** → **Registration Document (C)**
2. Navigate to **Demographics** tab → **Marital Status** dropdown

Path 4:

1. Go to **Client** → **Agency/Program Discharge Document**
2. Navigate to **Demographics** tab → **Marital Status** dropdown

Government Performance and Results Act (GPRA) Document

Reference No	Task No	Description
71	Core Bugs # 132863	In the PDF of ‘Government Performance and Results Act Outcome Measure’ document, the ‘Opioid’ section items were displayed in ‘Alcohol’ section.

Core Bugs # 132863: In the PDF of ‘Government Performance and Results Act Outcome Measure’ document, the ‘Opioid’ section items were displayed in ‘Alcohol’ section

What’s Fixed:

We resolved an issue in the PDF generated from the Government Performance and Results Act Outcome Measure document where the system incorrectly displayed items from the Opioid section under the Alcohol section. This misplacement affected the document's accuracy and could lead to misinterpretation of client data.

With this fix, the PDF now correctly categorizes and displays Opioid and Alcohol entries in their respective sections, ensuring the document reflects accurate and reliable information.

Where to Find It:

Path:

1. **Client** → **Government Performance and Results Act Outcome Measure Document**
2. Fill in the required details → **Sign** the document
3. PDF will generate

Group Details

Reference No	Task No	Description
72	Core Bugs # 132879	Group Service - Dropdown cuts off selections

Core Bugs # 132879: Group Service - Dropdown cuts off selections

What's Fixed:

We resolved an issue where the Evidence Based Practices dropdown on the Group Service Detail page was cut off and didn't display the full list of options. This made it difficult for users to view or select all available choices.

With this fix, the dropdown now displays the complete list without any visual cutoff, ensuring a smooth and accurate selection experience.

Where to Find It:

- **My Office** → **Groups** → **Groups** list page → **New** → **Group Details** page → **Save** → **Schedule** tab → **New Group Service** → **Group Service Client Popup** → **Select** → **Group Service Detail** page → **Evidence Based Practices** dropdown

Group Services

Reference No	Task No	Description
73	Core Bugs # 133086	Custom Fields dropdowns in Group Notes carry over the selected value between clients.
74	Core Bugs # 133038	When the 'Primary Clinician' is changed in the 'Groups', the update did not reflected in the 'Future Group service Documents'.
75	Core Bugs # 132661	Group Services – Implemented a new Information message when Group Services with a balance are set to Error.

76	Core Bugs # 133093	Group Services – In the Client Note tab for the dropdown fields, the tab off was not working.

Core Bugs # 133086: Custom Fields dropdowns in Group Notes carry over the selected value between clients

What's Fixed:

We resolved an issue where selecting a value from a custom dropdown field in the Group Services section incorrectly carried that value over to the next client selected in the session. This behavior caused confusion and potential data entry errors, as selections intended for one client appeared under another.

With this fix, the system now correctly ties dropdown selections in the Custom tab only to the currently selected client.

Where to Find It:

Path:
My Office → **Group** → Select a group → **Schedule** tab → **New Group Service** → Enter date and select a client → **Services** tab → **Custom** tab → Select dropdown value → Switch to another client → **Custom** tab

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Core Bugs # 133038: When the 'Primary Clinician' is changed in the 'Groups', the update did not reflected in the 'Future Group service Documents'

What's Fixed:

We resolved an issue where updates to the Primary Clinician in a Group were not reflected in future Group Service documents. This caused inconsistencies in documentation and staff assignments for scheduled group services.

With this fix, the system now correctly applies changes to the Primary Clinician across all future Group Service documents, ensuring accurate clinician assignment and improved continuity of care.

Where to Find It:

Path 1:

My Office → **Groups** → **Groups List** page → Click **New** → **Group Detail** page → Fill out **General tab** → Click **Save** → Go to **Schedule** tab → Click **New Group Service** → Select **Date** of Service and Clients → Click **Select**

Path 2:

Group Service Detail screen → **Group** tab → **Group Details** tab → Confirm Group and Staff details → Click **Recurrence** icon → Set recurrence pattern → Click **Create Immediately** → Click **OK**

- Follow the steps above → Change the Primary Clinician → Click **Save**

Path 3:

My Office → **My Documents** → **My Documents** List page → Filter by appropriate dates → Click **Apply Filter**

Core Bugs # 132661: Group Services – Implemented a new Information message when Group Services with a balance are set to Error

What's Fixed:

We resolved an issue where users could mark a Group Service as having an Error status even when a payment balance remained on the service. The lack of validation led to inconsistencies in service and billing records.

With this release, we implemented an Information Message popup on the Group Service Detail screen. If a user attempts to mark a Completed Service as Error while the payment balance is not zero, the system displays the following message:

Error Message:

Service ID: XXXX – Service cannot be deleted since the balance of the payment is not zero.

This validation is triggered only when the system configuration key **ALLOWSERVICEERRORWITHPAYMENT** is set to **N**.

Where to Find It:

- **My Office** → **Groups** → **Groups** list page → **New** → **Group Detail** page → **Save** → **Schedule** tab → **New Group Service** → **Group Service Clients popup** → **Select Date of Service and Clients** → **Select**
- **Group Service Detail Screen** → **Group** tab → **Group Details** tab → **Services** tab → **Service Information** tab → **Save** → **Note** tab → **Client Note** → **Save** → **Sign**
- **Client from Group** → **Services Quick Link** → **Client Menu** → **New** → **Service Detail Page** → Enter required fields → **Save** → **Complete Service** → **Make Payment**
- **Group Service Detail Screen** → **Group** tab → **Top** menu icons → **Mark As Error** → **Confirmation Message** popup → **Information Icon** displays

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Core Bugs # 133093: Group Services – In the Client Note tab for the dropdown fields, the tab off was not working

What's Fixed:

We resolved a usability issue in the Client Note tab of Group Services where Tab key navigation skipped over dropdown fields. This prevented users from efficiently moving through the form using keyboard input.

With this fix, Tab key navigation now works correctly for all dropdown fields in the Client Note tab, allowing users to move through the form seamlessly and improving overall accessibility and user experience.

Where to Find It:

Path 1:

1. **My Office** → **Groups** → **Groups List** page → Click **New** icon
2. **Group Detail** page → Enter required fields in **General** tab → **Save**
3. Navigate to **Schedule** tab → Click **New Group Service** button
4. **Group Service Clients** popup → Select **Date of Service and Clients** → Click **Select**

Path 2:

1. Navigate to **Group Service Detail** screen → **Group** tab → **Group Details** tab
2. Ensure **Group** section is initialized → Navigate to **Services** tab
3. Enter required fields in **Service Information** tab → Select **Mode of Delivery** → **Save**
4. Navigate to **Note** tab → **Client Note** tab

Inquiry Details

Reference No	Task No	Description
77	Core Bugs #132914	Added an index to the Inquiries table.
78	Core Bugs # 132612	Performance issue observed while opening Inquiry Details screen from unsaved changes

Core Bugs # 132914: Added an index to the Inquiries table

What's Fixed:

We resolved an issue where the Inquiries table lacked foreign key constraints and indexing on key columns, which could lead to data integrity issues and slow query performance.

With this fix, we added foreign keys and indexes to the following columns in the Inquiries table:

- **CrisisAssociatedServiceId**
- **CrisisAssociatedDocumentId**
- **CrisisAssociatedFormId**

This update improves data consistency and enhances system performance when accessing or managing inquiry records.

Where to Find It:

Not applicable (backend database change)

Core Bugs # 132612: Performance issue observed while opening Inquiry Details screen from unsaved changes

What's Fixed:

We resolved an issue where the system loaded a large dataset from the **CoveragePlans** table—including both Active and Inactive plans—when users accessed the Inquiry Details screen through unsaved changes. This behavior caused performance issues and slowed down screen load time. Additionally, the system added duplicate coverage plans to the dataset.

With this fix, we optimized the **CoveragePlans** table to load only Active coverage plans. The Inquiry Details screen now performs efficiently, and the system no longer adds duplicate entries to the dataset.

Pre-requisite:

Create unsaved changes by entering details in the **Inquiry** screen.

Where to Find It:

Path:

1. **Client** → **Search** → Select **Client**
2. **Inquiry (Client)** → Enter details (unsaved changes created)
3. Open any other screen → Navigate back to **Inquiry Details** screen via unsaved changes

Manage Staff

Reference No	Task No	Description
79	Core Bugs # 132901	Staff's Licenses / Degrees tab inconsistent response from system

Core Bugs # 132901: Staff's Licenses / Degrees tab inconsistent response from system

What's Fixed:

We resolved an issue where the system intermittently displayed a red error message—**"Object reference not set to an instance of an object."**—when users accessed the **Licenses/Degrees** tab on the Staff Details page. This error prevented users from viewing or updating license and degree information for staff members.

With this fix, the **Licenses/Degrees** tab now loads consistently without interruptions or error messages, allowing users to manage staff credentials smoothly.

Where to Find It:

Path:

1. **Administration → Staff/Users**
2. **Staff/Users** list page → Click on required **Staff Name** hyperlink
3. **Staff Details** page → Click on **Licenses/Degrees** tab

Merge Clients

Reference No	Task No	Description
80	Core Bugs # 132981	Client Search option disappeared when clicking on 'Client search' icon after merging two clients.

Core Bugs # 132981: Client Search option disappeared when clicking on 'Client search' icon after merging two clients

We resolved an issue where the **Client Search** option disappeared after users merged two clients. On the **Merge Clients** screen, clicking the **Client Search** icon after completing a merge failed to display the search functionality, preventing users from initiating new client searches.

With this fix, the system now correctly displays the **Client Search** option when users click the icon after merging clients, restoring full search capability.

Where to Find It:

Administration → **Merge Clients** → Select Clients → Click on **Merge Clients** icon

Message (My Office)

Reference No	Task No	Description
81	Core Bugs # 133064	Navigating to Messages screen through unsaved changes affected the Reply functionality

Core Bugs # 133064: Navigating to Messages screen through unsaved changes affected the Reply functionality

What's Fixed:

We resolved an issue in **Messages (My Office)** where the system incorrectly displayed the contents of one message in the reply window for another. This occurred when users had multiple messages and created unsaved changes in one (e.g., Message 1), then attempted to reply to another (e.g., Message 2), leading to potential data breaches and confusion in message handling.

With this fix, the system now prompts users with a confirmation message when they switch between messages with unsaved changes. If users click **OK**, the system discards the unsaved changes from the first message and correctly displays the content for the second message.

Where to Find It:

Path 1:

1. SmartCare → **Messages (My Office)** → **New**
2. Send two messages to the same staff

Path 2:

1. Login to SmartCare as the receiving staff
2. **Client** → **Messages (My Office)** → Select any message → Click **Reply**
3. Navigate to another screen (e.g., **My Documents**)
4. Return to **Messages (My Office)** via unsaved changes → Select second message → Click **Reply**
5. Confirmation Message appears → Click **OK**

Confirmation Message:

"Do you want to proceed? Clicking 'OK' will clear any unsaved changes in the Message Details for the logged-in staff member."

~~Methadone~~

~~Reference No~~	~~Task No~~	~~Description~~
~~82~~	~~Core Bugs # 132780~~	~~MAT: When the Frequency Time was changed, duplicate MAT records were created.~~
~~83~~	~~Core Bugs # 132774~~	~~MAT Management list page - Unable to Place a Backdated Client Order for MAT Dispensing.~~
~~84~~	~~Core Bugs # 132979~~	~~MAT Management Details: MAR Details Popup is not displayed on click of 'Dispensed Date & Time' hyperlink from the 'Dispense and No Show History grid'.~~
~~89~~	~~Core Bugs # 132753~~	~~MAT: The Patient Safety Acknowledgement popup message is displayed only once for the re-dispense.~~

~~Core Bugs # 132780: MAT: When the Frequency Time was changed, duplicate MAT records were created~~

~~What's Fixed:~~

~~We resolved an issue where updating the **Frequency Time** in the **Order Template Frequencies** screen caused the stored procedure **ssp_CreateMATDetails** to create duplicate MAT records for the same date. This resulted in inaccurate data in the **MAT Management Details** screen.~~

~~With this fix, the system now checks for existing records before creating new ones. If a record already exists for a given date, the system does not create a duplicate—even if the frequency is updated. The updated frequency applies only to newly created records or schedules.~~

~~Where to Find It:~~

- **~~Path 1:~~**
  ~~**Client** → **Client Orders** → **New** → Search and select **Methadone Medication** → Enter required data → **Insert** → **Save/Sign**~~
- **~~Path 2:~~**
  ~~**Administration** → **Order Template Frequencies** → Open frequency used in the order → **Update Frequency Time** → **Save**~~
- **~~Path 3:~~**
  ~~**My Office** → **MAT Management** → Filter by date → Click **Dispense** icon → View **MAT Management Details**~~

~~Core Bugs # 132774: MAT Management list page - Unable to Place a Backdated Client Order for MAT Dispensing~~

~~What's Fixed:~~

~~We resolved an issue in the **MAT Management** list page where the system failed to display backdated Client Orders. This prevented users from dispensing medications for those orders.~~

~~With this fix, users can now place and dispense backdated orders by adjusting the date filter and selecting the **No Pump** option in the MAT Management workflow.~~

~~Where to Find It:~~

~~Path 1:~~
~~**Go Search** → **Client Orders (Client)** → **Client Orders** list page → **New** → Enter required details → **Save/Sign**~~

~~Path 2:~~
~~**My Office** → **MAT Management** → **MAT Management Details** → **Dispense**~~

~~Core Bugs # 132979: MAT Management Details: MAR Details Popup is not displayed on click of 'Dispensed Date & Time' hyperlink from the 'Dispense and No Show History grid'~~

~~What's Fixed:~~

~~We resolved an issue in the **MAT Management Details** screen where clicking the **'Dispensed Date & Time'** hyperlink in the **Dispense and No Show History** grid failed to display the **MAR Details** popup. This prevented users from accessing detailed medication administration records directly from the history grid.~~

~~With this release, the system now correctly displays the **MAR Details** popup when users click the **'Dispensed Date & Time'** hyperlink, allowing full visibility into medication administration details.~~

~~**Prerequisites:**~~

1. ~~A MAT Order must be signed for the selected client.~~
2. ~~MAT Medication must be dispensed to the selected client.~~

~~**Where to Find It:**~~

- ~~**My Office → MAT Management → MAT Management List Page → Dispense Icon → MAT Management Details → Sign → Face-to-Face/Take Home Dispense**~~

~~Core Bugs # 132753: MAT: The Patient Safety Acknowledgement popup message is displayed only once for the re-dispense~~

~~**What's Fixed:**~~

~~We resolved an issue in **MAT Management** where the **Patient Safety Acknowledgement** popup appeared only once per day, even if users performed multiple qualifying actions. The popup was triggered during **Dispense**, **Re-dispense**, or **Edit Dosage** actions—but only if the dispensed quantity differed from the previous dose and exceeded the configured threshold. However, it did not reappear for subsequent qualifying actions on the same day.~~

~~With this release, the system now displays the **Patient Safety Acknowledgement** popup every time a qualifying action is performed—**Dispense**, **Re-dispense**, or **Edit Dosage**—if the dispensed quantity differs from the last and exceeds the configured threshold (either increase or decrease).~~

~~**Prerequisite:**~~

- ~~The system configuration key **ALLOWSERVICEERRORWITHPAYMENT** must be set to **N**.~~

~~**Where to Find It:**~~

- ~~**Administration → Orders → Orders list page → New → Order Details → Select Medication Order Type → Enable MAT settings → Save**~~
- ~~**My Office → Medication/Lot/Bottle list page → New → Medication/Lot/Bottle Details → Save**~~
- ~~**Client → Client Orders → New → Client Order Details → Select MAT Order → Enter Take Home Days → Save and Sign**~~
- ~~**My Office → MAT Management → Connect User → Connection Details → Connect Machine/Inventory**~~
- ~~**My Office → MAT Management → Select Order → Dispense icon → Dispense Dose**~~

My Calendar

Reference No	Task No	Description
92	Core Bugs # 133024	Updates to Appointments made through Service Detail are not reflected on Staff Calendar.

Core Bugs # 133024: Updates to Appointments made through Service Detail are not reflected on Staff Calendar

What's Fixed:

We resolved an issue where updating the **Start Time** or **End Time** of a service through the **Service Detail** or **Service Note** screens did not update the **Staff Calendar**. The calendar continued to display the original time values, causing scheduling discrepancies.

With this fix, the system now accurately reflects any changes made to the **Start Time** or **End Time** of a service on the **My Calendar** screen, ensuring staff calendars stay synchronized with service details.

Where to Find It:

Path 1:

1. **Client** → **Services** → **Services** list page → Click **New** icon
2. **Service Detail** page → Enter required data → **Save**

Path 2:

1. **Client** → **Services/Notes** → **Service Note** list page → Click **New** icon
2. **Service Note** page → Enter required data → **Save**

Path 3:

1. **Client** → **Services** → **Services** list page → Click on created **DOS** hyperlink
2. **Service Detail** page → Update **Start/End Time** → **Save**

Path 4:

1. **Client** → **Services/Notes** → **Services/Notes** list page → Click on created **DOS** hyperlink
2. **Service Note** page → Update **Start/End Time** → **Save**

Path 5:

My Office → **My Calendar** → Filter for the updated service → Click **Apply Filter**

My Documents List Page

Reference No	Task No	Description
94	Core Bugs # 133019	Documents cannot be added from the Associate Documents pop-up if the associated Program code contains single quotes (').

Core Bugs # 133019: Documents cannot be added from the Associate Documents pop-up if the associated Program code contains single quotes (')

What's Fixed:

We resolved an issue where users couldn't add documents from the **Associated Documents** pop-up if the associated **Program Name** contained single quotes ('). Clicking the **Add** button failed to insert the selected documents into the **List of Associated Documents**, disrupting document association workflows.

With this fix, the system now correctly handles **Program Names** that include single quotes. When users click the **Add** button in the **Associated Documents** pop-up, the system successfully adds the selected documents to the **List of Associated Documents**, regardless of the presence of single quotes in the Program Name.

Prerequisites:

- A Program Name that includes single quotes (')
- A document to be associated with that Program

Where to Find It:

Path:

My Office → **My Documents** → **Associated Documents** pop-up

My Reports

Reference No	Task No	Description
95	Core Bugs # 132953	ER Claim Lines: Duplicate Payment Rows
97	Core Bugs # 132933	The Aging Report is loaded without displaying the relevant data.
98	Core Bugs # 133030	My Reports: users are unable to filter reports for specific clients.
99	Core Bugs # 133096	UDS Section E - BMI Output Label Change
105	Core Bugs # 133025	Unable to run 'Staff Client Access Tracking' report.

Core Bugs # 132953: ER Claim Lines: Duplicate Payment Rows

What's Fixed:

We resolved an issue where the **ER Claim Line Denials** reports displayed duplicate payment rows when processing an **835 file** containing multiple **Remark Codes** for a single **ClaimLineItemId**. The system listed the same service multiple times, with each remark code appearing on a separate line.

With this fix, the system now consolidates multiple remark codes into a single field for each **ClaimLineItemId**. Each service line appears only once in the report, eliminating duplicate entries and improving report accuracy.

Pre-requisite:

Process an 835 file (ERfileID) that contains multiple Remark Codes and note the corresponding ERfileID.

Where to Find It:

Path 1:

1. **My Office** → **My Reports** quick link
2. Search for **"ER Claim Line Denials"** report → Click report name hyperlink
3. Report opens in a new window → Enter **ERfileID** → Click **View Report**

Path 2:

1. **My Office** → **My Reports** quick link
2. Search for **"ER Claim Line Denials CSV"** report → Click report name hyperlink
3. Report opens in a new window → Enter **ERfileID** → Click **View Report**

Core Bugs # 132933: The Aging Report is loaded without displaying the relevant data

What's Fixed:

We resolved an issue where the **AR Aging Summary** report failed to display relevant data based on applied filter parameters. On the **My Reports** list page, selecting the AR Aging report resulted in a persistently blank output, even when users applied valid filters.

With this release, we removed **CDAG changes** from the AR Aging Reports to improve performance. The report now loads faster and accurately reflects filtered data, restoring full reporting functionality.

Where to Find It:

My Office → **Reporting** → **My Reports** → **My Reports** list page → Search for **"AR Aging Report"** → Click on report hyperlink

Core Bugs # 133030: My Reports: users are unable to filter reports for specific clients

What's Fixed:

We resolved an issue where users couldn't filter reports by specific clients on the **My Reports (My Office)** page because the **ClientID** filter was missing. This limitation prevented users from viewing client-specific report data.

With this fix, the system now correctly displays the **ClientID** filter for client-related reports, allowing users to efficiently narrow down results and access relevant information.

Where to Find It:

Path:

1. Go to **Search**
2. Select **My Reports** (**My Office**)

Core Bugs #133096: UDS Section E - BMI Output Label Change

What's Fixed:

We resolved an issue in **UDS Section E** where the system incorrectly displayed the **BMI Output Label** for the 2025 reporting year. The field name appeared as **"BMI Result (kg/m²)"**, which did not align with the intended reporting format.

With this fix, we updated the field name to **"BMI Result (Percent)"** for the 2025 reporting year, ensuring consistency with reporting standards and improving clarity for users reviewing UDS data.

Where to Find It:

Path:

Go to **My Office** → **UDS Table 6B Details – Section E**

Core Bugs # 133025: Unable to run 'Staff Client Access Tracking' report

What's Fixed:

Users previously couldn't run the Staff Client Access Tracking report because the system lacked the necessary stored procedures. This issue blocked the report from executing and retrieving access tracking data as expected.

The fix restored the missing stored procedures, enabling the Staff Client Access Tracking report to run successfully without errors. Users can now view staff access history for clients.

Where to Find It:

Path:

Client → Staff Client Access Tracking Report

Peer Record Reviews

Reference No	Task No	Description
108	Core Bugs # 132998	The results of Peer Record Reviews always shows 'Acceptable', despite the user's selection of 'No'.

Core Bugs # 132998: The results of Peer Record Reviews always shows 'Acceptable', despite the user's selection of 'No'

What's Fixed:

We resolved an issue where the Peer Record Reviews list page always showed "Acceptable" in the Results column, even when users selected "No" for a questionnaire item during the review process. This misrepresentation affected the accuracy of review outcomes.

The fix ensures that the system now correctly displays "Below Standard" in the Results column when users select the "No" radio button in the Peer Record Review Details screen, accurately reflecting the responses provided.

Where to Find It:

Path:

1. Go to My **Office** → **Peer Record Reviews** list page
2. Click **New**
3. Select **Review Type** and **Clinician Reviewed** dropdown value
4. Click **Random** in the **New Peer Record Review** screen
5. Click **Create Peer Record Review**
6. Select **No** for a questionnaire item → Click **Calculate** → Click **Save**
7. Close the review and return to the **Peer Record Reviews** list page

The **Results** column will now display Below Standard for the respective review

~~Primary Care~~

~~Reference No~~	~~Task No~~	~~Description~~
~~110~~	~~Core Bugs # 133050~~	~~The 'Primary Care Appointments' continued to appear in 'SmartView' even after being cancelled or marked as errors.~~

~~**Core Bugs # 133050: The 'Primary Care Appointments' continued to appear in 'SmartView' even after being cancelled or marked as errors**~~

~~**What's Fixed:**~~

~~The team resolved an issue where SmartView continued to display Primary Care Appointments even after users marked them as Cancelled or Error. This caused confusion for users relying on SmartView to track active appointments.~~

~~The fix ensures that SmartView now correctly excludes cancelled or erroneous Primary Care Appointments, displaying only valid and active appointments.~~

~~**Where to Find It:**~~

~~**Path 1:**~~
~~**My Office** → **My Calendar** → Create a **Primary Care Appointment** → Enter required fields and status → Click **Save**~~
~~**Path 2:**~~
~~Client search → **Primary Care Appointments** screen → Open appointment → Change status to **Cancelled** or **Error** → Click **Save**~~

Programs

Reference No	Task No	Description
112	Core Bugs # 132959	The 'Assigned Staff' name displaying issue on the 'Program Assignment Details' page.
113	Core Bugs # 131611	Program Assignments: SmartCare allows Discharge dates to be removed from prior Client Program Enrollments when there is an existing enrollment for the same program

Core Bugs #132959: The 'Assigned Staff' name displaying issue on the 'Program Assignment Details' page

What's Fixed:

The system previously displayed staff names in the Assigned Staff column of the Program Assignment Details screen using the format LastName + FirstName, even when a Display As name was configured. This caused confusion in clinical and operational workflows where staff are commonly identified by their preferred names.

The update ensures the Assigned Staff column now shows the Display As name when available. If the Display As value is null or empty, the system defaults to displaying the staff's legal name in the LastName + FirstName format.

Where to Find It:

- **Program** → **Program Assignments** → **Program Assignments** list page → **New** or **Status** hyperlink → **Program Assignment Details** → **History section**
- **Client** → **Programs** → **Programs** list page → **New** or **Status** hyperlink → **Program Assignment Details** → **History section**

Core Bugs # 131611: Program Assignments: SmartCare allows Discharge dates to be removed from prior Client Program Enrollments when there is an existing enrollment for the same program

What's Fixed:

We resolved an issue where SmartCare allowed users to remove discharge dates from prior Client Program Enrollments, even when an active enrollment for the same program already existed. This led to overlapping program records and potential data integrity issues.

To prevent these conflicts, the system now enforces a new validation that blocks modifications to older enrollment records if they overlap with the date range of an existing enrollment for the same program. Users can now update only the most recent enrollment record.

Validation Message:

"There is an enrollment record already available during this period. Please check the dates on both records as overlaps are not allowed."

Additionally, when users select a custom status from the Status dropdown, the system now automatically clears the Requested, Enrolled, and Discharged date fields. It also triggers new validations to ensure data accuracy and prevent conflicts.

Where to Find It:

Path 1:
Program Assignments → **Program Assignments** list page → Click on a **Discharged** status hyperlink → **Program Assignment Details** → **Modify Discharge Date** or **Current Status** → Click **Save**
Path 2:
Client → **Programs** → **Programs** list page → Click on a **Discharged** status hyperlink → **Program Assignment Details** → **Modify Discharge Date** or **Current Status** → Click **Save**

Rx Application

Reference No	Task No	Description
118	Core Bugs # 132894	Misspelling in the 'Free- Text Sig' Pop up for Patches and Suppositories

Core Bugs # 132894: Misspelling in the 'Free- Text Sig' Pop up for Patches and Suppositories

What's Fixed:

The team resolved an issue where the Free-Text Sig popup displayed incorrect plural forms when users prescribed medications with a potency unit of Patch or Suppository. If the calculated dose exceeded 1, the system incorrectly added an "s" to the end of the word, resulting in misspellings such as:

- *Place 2.4285714 Patchs (17mg) Onto The Skin Daily*
- *Administer 6 Suppositorys (1200mg) Into The Vagina Daily*

With this update, the system now uses the correct plural forms:

- *Place 2.4285714 Patches (17mg) Onto The Skin Daily*
- *Administer 6 Suppositories (1200mg) Into The Vagina Daily*

Where to Find It:

Path:
My Office → **Medications** → **Rx Application** → **Start Page** → **Patient Summary** → **New Order** → Select a drug with potency unit as **Patch or Suppository** → Fill required fields → **Insert** → **Free-Text Sig popup** → **Update & Close** → **Prescribe**

Services

Reference No	Task No	Description
119	Core Bugs # 133099	'ServiceUnits' column is missing in exported excel.
120	Core Bugs # 132954	New configuration is added to show or hide 'ServiceUnits' column in Export excel file.

Core Bugs # 133099: 'ServiceUnits' column is missing in exported excel

What's Fixed:

The team resolved an issue where exported data from the Services list page excluded the ServiceUnits column from the downloaded Excel file. This omission made it difficult for users to review or analyze service unit data outside the system.

With this update, the system now includes the ServiceUnits column in the exported Excel file, allowing users to access complete service information for reporting or offline use.

Where to Find It:

Path:
My Office → **Services** → **Services** list page → Click the **Export** icon → Open the downloaded Excel file

Core Bugs # 132954: New configuration is added to show or hide 'ServiceUnits' column in Export excel file

What's Fixed:

The team resolved an issue where the system always included the ServiceUnits column in exported Excel files from the Services list page, even when it wasn't needed. This led to confusion and clutter in exported reports.

With this update, the system introduces a new configuration key that gives administrators control over whether the ServiceUnits column appears in the export. The system now respects the value of this setting:

- If set to **Yes** (default), the ServiceUnits column is included in the export.
- If set to **No**, the column is excluded.

Where to Find It:

Path 1:

Administration → **Configuration Keys** → Open **IncludeServiceUnitsInMyOfficeServicesExport**

Path 2:

My Office → **Services** → **Services** list page → Click the **Export** icon → Open the downloaded Excel file

Configuration Key Details:

- **Key**: IncludeServiceUnitsInMyOfficeServicesExport
- **Read Key As**: Include Service Units in My Office Services Export
- **Allowed Values**: Yes, No
- **Default Value**: Yes
- **Modules Affected**: Billing - Regenerate Charges for a Service, SCM Accounts Receivable, SCM Admin 2, SCM Financial 1

Note: If the key is set to any value other than "Yes" or "No", the system will default to Yes.

SmartCare Improvements

Reference No	Task No	Description
134	Core Bugs # 133054	System Not Validating Expired Passwords Correctly
135	Core Bugs # 133098	Users cannot login to the application

Core Bugs # 133054: System Not Validating Expired Passwords Correctly

What's Fixed:

The system previously failed to prompt users to reset their password during login when their password had expired. This occurred because it miscalculated the expiration date and didn't validate it correctly, allowing users with expired passwords to log in without updating their credentials.

The update ensures the system now properly checks for expired passwords—even when the expiration value is missing (NULL)—and prompts users to reset their password before gaining access.

Where to Find It:

Path:
Login → **Administration** → **Staff/Users** → **Account** section → Check expired password → Attempt login with that user

Core Bugs # 133098: Users cannot login to the application

What's Fixed:

We resolved an issue that prevented users from logging in to the SmartCare application. After entering valid credentials, the system displayed the error message:

"Unknown error occurred, please try again later."

With this fix, users can now log in successfully without encountering any errors..

Where to Find It:
SmartCare Login page

Staff Calendar

Reference No	Task No	Description
136	Core Bugs # 133018	Programs in Staff Calendar are not sorting alphabetically.

Core Bugs # 133018: Programs in Staff Calendar are not sorting alphabetically

What's Fixed:

The system previously displayed the Program dropdown list in the Scheduler Event popup of the My Calendar screen without sorting it alphabetically. This made it difficult for users to quickly locate and select the desired program when creating calendar entries.

The update now sorts the Program dropdown list alphabetically, improving usability and streamlining the scheduling process.

Where to Find It:

Path:

1. **My Office → My Calendar**
2. Click **"Click to Create New Calendar Entry"** icon
3. **Scheduler Event** popup → **Program** dropdown

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
31	CLIENTNOTELEVEL
70	MARITALSTATUS

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.

There are no Recodes for Defects.

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
11	EnableJobToAutomateBundledServices
52	DocumentSignaturesNoPassword
52	AllowVersionAuthortoSign
75	ALLOWSERVICEERRORWITHPAYMENT
120	IncludeServiceUnitsInMyOfficeServicesExport

Data Model Changes

There are no data model changes for Defects.

SmartCare Testing Strategy – September 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

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

Documents

- **Defect #129532** – Validate that **Document Locking** no longer occurs when multiple staff edit separate document types simultaneously.
- **Defect #130049** – Confirm that **amendment comments** correctly display in the Document History panel after saving.
- **Defect #130351** – Ensure the **signature validation message** no longer appears incorrectly when using "Sign & Close" on completed documents.

Dynamic Forms (DFA)

- **Defect #130197** – Verify form field responses retain saved values after reopening the DFA.
- **Defect #130421** – Confirm the **validation message** no longer triggers incorrectly when required fields are already filled.

Client Search

- **Defect #130693** – Validate that **multi-field search (Name/SSN/DOB)** operates as expected when using new OR logic.
    - Confirm results prioritize exact matches and return clients even when partial matches exist.

Authorizations

- **Defect #130832** – Test variable rate authorizations save correctly and reflect in related billing screens when configuration key EnableCMVariableRateConfiguration = "Yes."
- **Defect #131025** – Validate that voided authorizations no longer appear in active lists and cannot be selected for claim creation.

Claims / Billing

- **Defect #130901** – Confirm **claim resubmission** successfully generates corrected claims without duplicating header data.
- **Defect #130913** – Validate that **Adjustment Reason Codes** correctly populate when claim corrections are processed.
- **Defect #131746** – Test claim batch file handling over **50,000 records** to ensure the system processes large volumes without error.

MAT (Methadone)

- **Defect #131992** – Validate that **Prime popups** are suppressed correctly during bottle change workflows.
- **Defect #132011** – Confirm that the **MAT client outcomes** evaluation tool properly calculates and displays GPRA-based outcome data.

Reception

- **Defect #131965** – Test the **flag icons and count column** display accurately in the Front Desk screen.
  - Confirm count changes dynamically as flags are added or removed.

Services / Notes

- **Defect #132325** – Validate new **"Create Service Note"** option on the Care Coordination screen creates service entries successfully.
- **Defect #131811** – Confirm that the **Sensitive Information section** appears or hides based on configuration key and service type.

RWQM

- **Defect #132020** – Verify **select/deselect** functionality allows for quick management of large charge volumes without system lag.
- **Defect #132017** – Confirm that "Date of Service From/To" filters function properly across backend and frontend RWQM workflows.

Reports

- **Defect #130409** – Confirm data accuracy in **UDS Table 9D (Patient Service Revenue)**.
- **Defect #131691** – Validate updated **Table 3B Demographic standards** display correct results.
- **Defect #131629** – Verify **Evidence-Based Practices Report (IPP T3 Indicator)** reflects proper logic for reporting indicators.

Rx Application

- **Defect #132110** – Validate **Layman's Terminology** displays correctly in the Controlled Substance Audit and Controlled Substance Reports.

- **Defect #130484** – Confirm diagnosis codes appear under “Dx/Purpose” dropdown in the Complete Medication Order page.

SmartCare Configuration / Permissions

- **Defect #129433 / #130997 / #131004 / #131022 / #131649 / #131668** – Verify **System Configuration** and **Column Configuration** icons appear only for users with proper permissions.
- **Defect #131020** – Confirm **non-configurable list pages** correctly hide configuration icons.

Widgets

- **Defect #131749** – Confirm **Service Request** and **Supervisee Request** widgets include new “Submitted” and “Re-Submitted” statuses.

Integration

- **Defect #129768** – Test **SmartCare–Patient Portal integration** for real-time updates to client demographics, refill requests, and secure data sharing.

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	September 2025 MSP