SmartCare™ November 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_1.40.000.2511.011 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’ (56)

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
43	Core Bugs # 133468	Goal Plan and Activity Tracker Not Pulling.	Activity Tracker
44	Core Bugs # 133655	Client field not visible in Activity Tracker Report.	Activity Tracker
45	Core Bugs # 133606	Service Request Detail screen and the Service Request Review/Approval Detail screen: Different client information was displaying on PDF other than selected client in List of Attachment Document section.	Authorization
46	Core Bugs # 133629	Service Request-Review/Approval Detail screen - Insert/Modify button was enabled if modify permission was not granted.	Authorization
47	Core Bugs # 133694	Incorrect Eligibility Files Logic & Results.	Batch Eligibility
48	Core Bugs # 133676	Last Name & First Name length issue in ssp_SCUpdateSubBatchResponse	Batch Eligibility
49	Core Bugs # 133421	incorrect duplicate component service warnings prevented valid Case Rate Services from completing successfully.	Case Rate
50	Core Bugs # 133588	Issues on CCBHC SDOH	CCBHC
51	Core Bugs # 133562	FQHC 59 modifier performance issue	Charges/Claims
52	Core Bugs # 133545	The system was not printing the telehealth modifier on UB04 paper replacement claims.	Charges/Claims
53	Core Bugs # 133616	Missing FacilityNPI FormatField for Professional Claims.	Charges/Claims
54	Core Bugs # 133491	[Claim Line Details]: Status mismatch in claim line information section and Status and Payment History section when navigated from unsaved changes.	ClaimLine
55	Core Bugs # 133648	Client Flag Details: The ‘Level’ field remains enabled for new clients even when the corresponding staff permission is denied.	Client Flags
56	Core Bugs # 133543	In the Client Information (C) screen, the Contact tab was throwing an error when	Client Information

		mapping an Associated Client ID to a contact.	
57	Core Bugs # 133384	A Red error message is displayed during the dataset merge process at the server side in Client Information.	Client Information
58	Core Bugs # 133439	Client Orders: Display issue in Interacting Medication Details and Severity Description pop up	Client Orders
59	Core Bugs # 133455	Saving medication order in client orders as a preference is changing dispense quantity.	Client Orders
60	Core Bugs # 133571	Updated the value of Configuration key 'ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders' to 'Rx and Client Orders' to ensure a warning message is displayed whenever duplicate orders are created.	Client Orders
61	Core Bugs # 133541	A red Error message is displayed when adding an order with a Question Answer with a special character.	Client Orders
62	Core Bugs # 133481	Client Order: Concern with Entering a Client Order tied to a Diagnosis Entry.	Client Orders
63	Core Bugs # 133569	Order Selection popup: The complete order name and description are not displayed in the Order column when mouse hovering.	Client Orders
64	Core Bugs # 133461	Client orders, Client MAR and Rx Medication Screens handling dispense times and overriding the dispense times.	Client Orders
~~65~~	~~Core Bugs # 133702~~	~~Assessment: Modified data in the 'Age of First Use' field was disappearing~~	~~Core Assessment~~
66	Core Bugs # 133649	The Disclosure PDF is not showing in the correct order for the attached documents from the ‘Disclosure/Request’ screen.	Disclosure/Request
67	Core Bugs # 133482	PHQ-9 Validation logic changes for 10th Question	Documents
68	Core Bugs # 133567	Suicide Risk Assessment able to be saved multiple times causing unsaved changes	Documents
69	Core Bugs # 133312	A red error was displayed in the ‘Safety/Crisis Plan (C)’ document after adding DFA as a tab.	Documents
70	Core Bugs # 133414	Diagnosis Document displaying Generic Validations	Documents
71	Core Bugs # 133521	Custom Table Grid Duplicates	Dynamic Forms

72	Core Bugs # 133484	External Staff members were not displayed in the 'External Email' popup.	External Email
73	Core Bugs # 133519	Flow Sheet - Non-staff data record is missing in the flowsheet.	Flow Sheet
~~74~~	~~Core Bugs # 133487~~	~~Client Suffix is not displayed in Client Header~~	~~Foster Care~~
75	Core Bugs # 133492	Group Services: Set All/Set Some buttons were not working in the Custom Fields tab.	Group Services
76	Core Bugs # 133488	The HL7 ADT messages were not processing successfully	Messages Interface
~~77~~	~~Core Bugs # 133388~~	~~MAT: The Face-to-Face doses did not change the status back to "In Progress".~~	~~Methadone~~
~~78~~	~~Core Bugs # 133537~~	~~In 'MAT Bottle Transaction Summary Report' only one row is displayed for each bottle with one day transactions.~~	~~Methadone~~
~~79~~	~~Core Bugs # 133424~~	~~MAT Management Details screen: After refreshing the browser, the user is unable to disconnect the Machine/Inventory connection.~~	~~Methadone~~
~~80~~	~~Core Bugs # 133570~~	~~MAT Management Details: printed label does not display Phone number consistently.~~	~~Methadone~~
~~81~~	~~Core Bugs # 133478~~	~~MAT Client Order: Not getting validation to return the Pre pours while signing new Client order~~	~~Methadone~~
~~82~~	~~Core Bugs # 133503~~	~~MAT: Updated all reports to reflect changes in date-time format and time zone.~~	~~Methadone~~
~~83~~	~~Core Bugs # 133667~~	~~Formatting issues with the MAT Spilled Medication by Date and MAT Pre Pour Transactions Reports when exporting to PDF.~~	~~Methadone~~
84	Core Bugs # 133431	The date of service, service Id and procedure columns are not mapped correctly in the 'Client Program Enrollment Without Active Coverage' report.	My Reports
85	Core Bugs # 133559	My Reports: error while running ER file Detail report	My Reports
86	Core Bugs # 133515	ER ClaimLineErrors Report issue.	My Reports
87	Core Bugs # 132166	interference with the ongoing service completion workflow	Nightly Billing job
88	Core Bugs # 133494	Client signature not displayed properly in the PDF when the document is signed by the patient in the Patient Portal.	Patient Portal

~~89~~	~~Core Bugs # 133587~~	~~SMARTPortal Demographics Updates not reflecting in Intelichart~~	~~Patient Portal~~
~~90~~	~~Core Bugs # 133661~~	~~Intelichart Patient Portal displayed only the first character of the entered text.~~	~~Patient Portal~~
91	Core Bugs # 133534	Quick orders: Comments containing **&** special character truncating in the PDF	Quick Orders
92	Core Bugs # 133675	Front Desk list page: Export button not working	Reception
93	Core Bugs # 133510	Resource Calendar – Calendar time-frame levels are not adjusted correctly when zoomed out.	Resource Calendar
94	Core Bugs # 133577	RWQM Rules – All Purposes filter still showing in Filter section	RWQM
95	Core Bugs # 133637	Rx: Medication History Is not getting generated.	Rx Application
96	Core Bugs # 133505	The 'Time In' and 'Time Out' fields defaulted to 12 AM when the user creates a Service from the 'Inquiry Details' screen.	Services
97	Core Bugs # 133618	"The Guardian didn't cosign the document" tracked flag hyperlink is not functional in the Tracking Widget.	Tracking Widget
98	Core Bugs # 133483	UDS Section K: Meets Numerator line 20a condition for Health data Element	UDS Reports

Functionality Task Details

Activity Tracker

Reference No	Task No	Description
43	Core Bugs #133468	Goal Plan and Activity Tracker Not Pulling
44	Core Bugs #133655	Client field not visible in Activity Tracker Report.

43. Core Bugs # 133468: Goal Plan and Activity Tracker Not Pulling.

What's Fixed:

The logic has been corrected. Now:

- When the configuration key **"SetActivityTrackerAutoScheduleDays"** is set to a value greater than 30 days and the job is executed, Activities are created as expected.
- A new script has been implemented to delete Activity Tracker records with dates beyond the **Client Order End Date**.

Where To Find It:

Path 1: 'Client' search – 'Goal Plan' document – 'Create Activity Type order'.

Path 2: 'Client' search – 'Client Activity Tracker'

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44. Core Bugs # 133655: Client field not visible in Activity Tracker Report.

What's Fixed:

The Client field in the 'Activity Tracker Report' header now displays when the report is accessed from the left navigation menu.

Where to Find It:

Path: Open 'Activity Tracker Report' from left navigation menu.

Authorization

Reference No	Task No	Description
45	Core Bugs # 133606	Service Request Detail screen and the Service Request Review/Approval Detail screen: Different client information was displaying on PDF other than selected client in List of Attachment Document section.
46	Core Bugs # 133629	Service Request-Review/Approval Detail screen - Insert/Modify button was enabled if modify permission was not granted.

45. Core Bugs # 133606: Service Request Detail screen and the Service Request Review/Approval Detail screen: Different client information was displaying on PDF other than selected client in List of Attachment Document section.

What's Fixed:

1. In the Service Request List and Service Request Review/Approval List pages, only records associated with the selected client are displayed.
2. The PDF generated from the "List of Attached Documents" in the Document section of the Attach/Review Documents popup (under the Attachment tab) now displays the correct client information details on the Service Request Details and Service Request Review/Approval Details screens.

Prerequisite:

The attached document exists in the Documents section of Service Request Detail screen and the Service Request Review/Approval Detail screen

Where To Find It:

Path 1: Select Client -- Search 'Service Request-Review/Approval List (Client)' screen – Service Request-Review/Approval List page – Click 'New' icon – Service Request- Review/Approval Detail screen

- Navigate to Attachments tab – Document section -- Open the any document in List of Attachment Document section -- Observe the displayed client information inside the attachment is correct

Path 2: Select Client -- Search 'Service Request List (Client)' screen – Service Request List Page - Click 'New' icon – Service Request Detail screen - Navigate to Attachments tab – Document section -Open the any document in List of Attachment Document section - Observe the displayed client information inside the attachment is correct

46. Core Bugs # 133629: Service Request-Review/Approval Detail screen - Insert/Modify button was enabled if modify permission was not granted.

What's Fixed:

In the Service Request-Review/Approval Detail screen, the Insert/Modify button is correctly enabled and disabled based on the user's permission.

Where To Find It:

Path1: Go Search -- Staff/User (Administration) -- select staff --Staff Details screen 'Roles/Permission' tab – 'Permission' section -- 'Screens (Update mode)' – deny permission for the DropDownList_ServiceRequests_ReviewStatus - Click Save button

Path2: Search/Select a client – Navigate to 'Service Request-Review/Approval List – click 'New' icon – Service Request- Review/Approval Detail screen – Navigate to 'Approval' tab

Batch Eligibility

Reference No	Task No	Description
47	Core Bugs # 133694	Incorrect Eligibility Files Logic & Results.
48	Core Bugs # 133676	Last Name & First Name length issue in ssp_SCUpdateSubBatchResponse

47. Core Bugs # 133694: Incorrect Eligibility Files Logic & Results.

What's Fixed:

The batch eligibility logic now includes only the Medicaid plans in which the client is enrolled during the 270 batch process. Traditional Medicaid is excluded when the client does not have that plan in their coverage record. This update prevents the system from performing unnecessary Medicaid eligibility checks.

Where To Find It:

Path: Login to 'SmartCare' Application -- Administration -- Batch Eligibility

48. Core Bugs # 133676: Last Name & First Name length issue in ssp_SCUpdateSubBatchResponse.

What's Fixed:

The allowed length of the FirstName field has been increased to 35 characters, and the LastName field to 60 characters in ssp_SCUpdateSubBatchResponse. As a result, the 271 Batch Eligibility response now processes successfully without failure.

Where To Find It:

Path: Login to 'SmartCare' Application -- Administration -- Batch Eligibility

Case Rate

Reference No	Task No	Description
49	Core Bugs # 133421	Incorrect duplicate component service warnings prevented valid Case Rate Services from completing successfully.

49. Core Bugs # 133421: incorrect duplicate component service warnings prevented valid Case Rate Services from completing successfully.

What's Fixed:

The system now excludes errored and non-billable Case Rate Services from duplicate validation, ensuring that only active and valid records are considered. This update allows service completion to proceed without false duplicate warnings.

Where to Find It: NA

CCBHC

Reference No	Task No	Description
50	Core Bugs # 133588	Issues on CCBHC SDOH

50. Core Bugs # 133588: Issues on CCBHC SDOH.

What's Fixed:

The system now includes clients in SDOH batch creation even when a Client Episode Discharge Date is not present. This ensures that the batch creation process considers clients who remain active in their episodes.

Where To Find It:

Path: 'My Office' – 'Clinical Quality Measures – Create a New Batch'.

Charges/Claims

Reference No	Task No	Description
51	Core Bugs # 133562	FQHC 59 modifier performance issue
52	Core Bugs # 133545	The system was not printing the telehealth modifier on UB04 paper replacement claims.
53	Core Bugs # 133616	Missing FacilityNPI FormatField for Professional Claims.

51. Core Bugs # 133562: FQHC 59 modifier performance issue.

What's Change:

The System performance has been **improved for the FQHC 59 modifier logic**. The updated logic ensures **more consistent behavior** and no longer requires a **charge for other services** for the **59 modifier** to appear in the **837 claim file**, when the coverage plan does not match the '**FQHC59ModifierPlans'** recode.

Prerequisite:

The Coverage Plan ID to be added in 'FQHC59ModifierPlans' recode.

Path 1: 'Client' search – Select a client -- 'Client Services' -- Create and complete services.

Path 2: 'My Office' -- 'Charges/Claims' -- Select the charges and click on the 'Electronic Claims' button

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52. Core Bugs # 133545: The system was not printing the telehealth modifier on UB04 paper replacement claims.

What's Fixed:

The Telehealth modifier now displays correctly in UB-04 paper replacement claims when the billing codes are properly configured.

Prerequisites:

1) The client must have an associated coverage plan with the UB04 paper claim format.
2) A billed charge to be created for the client.

Where To Find It:

Path 1: Go search-select 'Charges/claims' (My Office)-Select the billed charge (ClaimLineItemID) to navigate to the Claim Line-Item Details Screen-Click on Override button- Check the 'To be replaced' checkbox -Navigate to Claim details tab-add PCN number-Click on save.

Path 2: Navigate back to 'Charges/claims' under 'My office'-select the charge and click on 'Paper claims' button-In the Claims processing pop-up screen-click on 'Process now button' and 'create claim file' button to create the claim file.

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53. Core Bugs # 133616: Missing FacilityNPI FormatField for Professional Claims.

What's Fixed:

When a rule is configured for the **2310C – NM1 – 08 Service Facility Location ID Qualifier** and **2310C – NM1 – 09 Service Facility Location ID** fields on the **Claim Format Configuration Details** screen, the **full 10-character value is preserved**.

- The **NM1*77 segment** (Service Facility Loop **2310C**) correctly includes the **NM1*08** and **NM1*09** values exactly as configured on the **Claim Format Configuration** screen.
- A new format field, **2310C – NM1 – 09 Service Facility NPI** has been added.
- The format field **2310C – NM1 – 09 Service Facility Location ID** has been renamed to **2310C – NM1 – 09 Service Facility Tax ID**.

Prerequisites:

1) In the 'Plan Detail' screen select 'HIPAA 837 Professional' claim format from the 'Standard E Claim Format' drop-down.

2) Create a record in the 'Claim Provider Override Details' screen with the required details in the 'Claim Service Facility' field.

Note: Remove the NPI value from the data that has been provided in the 'Claim Service Facility' field. **Example:** if "Location" option is added in the 'Claim Service Facility' field, then the location 'NPI' must be 'NILL'.

3) Go to the 'Claims Format Configuration(s)' list page and click on the 837 Professional 'Claim Format Id" hyperlink.

4) In the "Claim Format Configuration Details" screen, go to the 'Rules' tab and Add a rules with 'Data Source' as required (Other)and the 'Data Values' as required (Other), and for the 'Format Fields' fields 2310C-NM1-09 Service Facility Location ID" -- in the "Claim Format Configuration Details".

Through below mentioned path:

Administration - Claims Format Configurations – Click on the required 'Claim FormatId' hyperlink (837Prof) -Claims Format Configurations Details – Rule tab – Select the required combinations of Data Source, Data Values, and Format Fields – Insert/Modify – Save.

Where To Find It:

Path: 'My Office' - 'Charges/Claims' -select the required charge id and click on 'E Claim' button – click on 'Process Now' button in the 'Claim Processing' pop-up – click on 'Create Claim File' button – click on 'Save As' button in the 'Claim File Creation' pop-up screen.

ClaimLine

Reference No	Task No	Description
54	Core Bugs # 133491	[Claim Line Details]: Status mismatch in claim line information section and Status and Payment History section when navigated from unsaved changes.

54. Core Bugs # 133491: [Claim Line Details]: Status mismatch in claim line information section and Status and Payment History section when navigated from unsaved changes.

What's Fixed:

The system now consistently displays the Claim Line Status and Claim Line History Status after the user closes the Action popup using the (X) icon and saves the claim line details.

Where To Find It:

Path1: 'Client' from client search popup -- 'My Office' -- 'Claims' -- Claim Type 'I'/'P'/'PI'/'PP' -- Claim Entry screen -- save -- Claim line id from claims list page ---.'Claim Line Details screen' -- 'Select Action' -- 'Adjudicate'/'Pay'/'Approve'/'Manual pend'/'Revert'/'Deny' -- select (x) close icon from respective popup -- Claim Line Details screen -- Add comment – save.

Client Flags

Reference No	Task No	Description
55	Core Bugs # 133648	Client Flag Details: The 'Level' field remains enabled for new clients even when the corresponding staff permission is denied.

55. Core Bugs # 133648: Client Flag Details: The 'Level' field remains enabled for new clients even when the corresponding staff permission is denied.

What's Fixed:

The system now disables the 'Level' field for new clients in the 'Client Flag Details' screen when the corresponding staff permission is denied.

Where To Find It:

Path: Client Search -- 'Client Flags' -- 'Client Flags' list page -- Click on new -- 'Client Flag Details' screen.

Client Information

Reference No	Task No	Description
56	Core Bugs # 133543	In the Client Information (C) screen, the Contact tab was throwing an error when mapping an Associated Client ID to a contact.
57	Core Bugs # 133384	A Red error message is displayed during the dataset merge process at the server side in Client Information.

56. Core Bugs # 133543: In the Client Information (C) screen, the Contact tab was throwing an error when mapping an Associated Client ID to a

contact.

What's Fixed:

Users can now successfully associate a Client ID with a contact in the Contacts tab of the Client Information (C) screen without encountering errors.

Where To Find It:

Path: Go Search **-** Open Client - 'Client Information (C) (Client)' – 'Contact' Tab – Click on the 'Associated Client ID' – select the client.

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57. Core Bugs # 133384: A Red error message is displayed during the dataset merge process at the server side in Client Information.

What's Fixed:

The system now automatically removes non-printable characters from the address field. As a result, merge validation errors are prevented, and red error messages will no longer appear during the dataset merge process.

Where To Find It:

Path 1: 'Client' search **--** Select a client – 'Client Information (C) – Add non-printable characters to the address field

Path 2: 'Client' search **–** Select a client – 'Client Information (C) – 'Contacts' tab- Add non-printable characters to the address field

Path 3: 'Client' search **–** Select a client – 'Registration' document– Add non-printable characters to the address field

Path 4: 'Client' search **–** Select a client – 'Client Information (Admin) – Add non-printable characters to the address field.

Path 5: 'Client' search **–** Select a client – 'Treatment Team' – Add non-printable characters to the address field

Path 6: 'Client' search **–** Select a client – 'Client Information (Client) – Add non-printable characters to the address field

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Client Orders

Reference No	Task No	Description
58	Core Bugs # 133439	Client Orders: Display issue in Interacting Medication Details and Severity Description pop up.
59	Core Bugs # 133455	Saving medication order in client orders as a preference is changing dispense quantity.
60	Core Bugs # 133571	Updated the value of Configuration key 'ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders' to 'Rx and Client Orders' to ensure a warning message is displayed whenever duplicate orders are created.
61	Core Bugs # 133541	A red Error message is displayed when adding an order with a Question Answer with a special character.
62	Core Bugs # 133481	Client Order: Concern with Entering a Client Order tied to a Diagnosis Entry.
63	Core Bugs # 133569	Order Selection popup: The complete order name and description are not displayed in the Order column when mouse hovering
64	Core Bugs # 133461	Client orders, Client MAR and Rx Medication Screens handling dispense times and overriding the dispense times.

58. Core Bugs # 133439: Client Orders: Display issue in Interacting Medication Details and Severity Description pop up

What’s Fixed:

In the Client Order Details screen, when a medication with interactions is added and the user clicks the number icon in the Interaction column of the Order List grid:

- The text is wrapped in both the **Severity Description** popup and the **Interacting Medication Details** popup.
- A vertical scroll bar is added to the **Interacting Medication Details** popup for easier viewing of the text.
- The **Severity Description** popup fits within the screen and does not extend beyond its boundaries.

Where to Find It:

Path 1: Go search – ‘Orders’ – ‘Click on ‘New’ icon - Order Details screen - Select Medication Order Type - Enter the required fields - Save.

Path 2: ‘Client Search’- ‘Client Orders’ – Click on New icon - Select Order created in Path 1 – Click on Insert – Click on the number icon in the Interaction column - Click on the Description hyperlink

Path 3: ‘Client Search’- ‘Client Orders’ – Click on New icon - Select Order created in Path 1 – Click on Insert – Click on the number icon in the Interaction column - Click on the Severity (number) hyperlink

59. Core Bugs # 133455: Saving medication order in client orders as a preference is changing dispense quantity.

What's Fixed:

Dispense quantity now displays correctly when saving medication order in Client Orders as a preference.

Where To Find It:

Path 1: Go search – Orders - New - Order Details screen - Select Medication Order Type - Enter the required fields - Save.

Path 2: 'Client'- 'Client Orders' – Click on New icon - Select Order created in Navigation Path1– Select the Preference checkbox – Click on Insert.

60. Core Bugs # 133571: Updated the value of Configuration key 'ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders' to 'Rx and Client Orders' to ensure a warning message is displayed whenever duplicate orders are created.

What's Fixed:

The Configuration key 'ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders' has been updated to 'Rx and Client Orders'.

The system now displays a warning message whenever duplicate medication orders are created in **Rx** or **Client Orders**.

Where To Find It:

Path1: My Office -- Orders -- Click on New icon -- 'Order Details' screen -- Select Medication Order Type -- Select -- Enter the required fields -- Click on 'Save'.

Path2: 'Client' -- 'Client Orders' -- Click on New icon -- Select Order created in Navigation Path 1 -- Click on 'Insert' and 'Sign'.

61. Core Bugs # 133541: A red Error message is displayed when adding an order with a Question Answer with a special character.

What's Fixed:

The system no longer displays the following error message when inserting a 'Client Order' that contains special characters in the 'Answer' text.

Error Message: An error occurred while parsing EntityName. Line 1, position 4063.'

Where To Find It:

Path: 'Client' search – 'Client Order' – Create an order with Questions

62. Core Bugs # 133481: Client Order: Concern with Entering a Client Order tied to a Diagnosis Entry.

What's Fixed:

In the 'Select from existing diagnosis:' dropdown of the Client Order Details screen, primary diagnosis displays first, followed by remaining diagnoses in ascending order.

Where To Find It:

Path 1: Go search – Orders - New - Order Details screen - Select Lab Order Type – Select Diagnosis Required = Yes radio button in Order Setup section - Enter the required fields - Save.

Path 2: 'Client'- 'Diagnosis Document' – Add the required 'DSM5/ICD10' codes – Sign.

Path 3: 'Client'- 'Client Orders' – Click on New icon - Select Order created in Path 1 – Enter the required details – Add the Diagnosis from the 'Select from existing diagnosis' dropdown – Click on Insert and Sign.

63. Core Bugs # 133569: Order Selection popup: The complete order name and description are not displayed in the Order column when mouse hovering.

What's Fixed:

Users will now see the full order name and description in the tooltip when mouse hovering over an order name in the Client Order Selection popup.

Where To Find It:

Path 1: Go search – Orders - New - Order Details screen - Select Medication Order Type – Select - Enter the required fields - Save.

Path 2: 'Client'- 'Client Orders' – Click on New icon - Select Order created in Navigation Path 1 – Click on Insert and Sign – Click on New icon – Client Order Selection popup.

64. Core Bugs # 133461: Client orders, Client MAR and Rx Medication Screens handling dispense times and overriding the dispense times.

Note:

1.The values for system configuration key "ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders" have been updated to Rx and Client Orders.

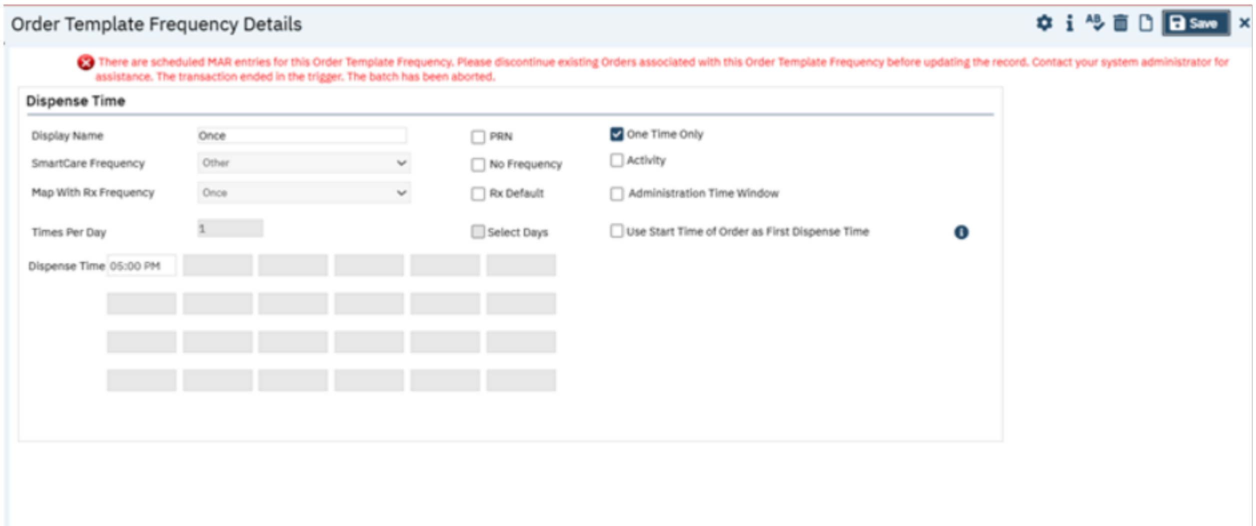
The warning messages for Rx and SmartCare will be displayed on both the **Client Order** Screen and the **Rx Medication** Screen when the system finds a duplicate order being placed.

2.To improve patient safety and ensure the integrity of Medication Administration Records (MAR), changes have been implemented to prevent the creation of duplicate MAR records in the Client MAR screen when the default frequency dispense time is updated.

What's Fixed:

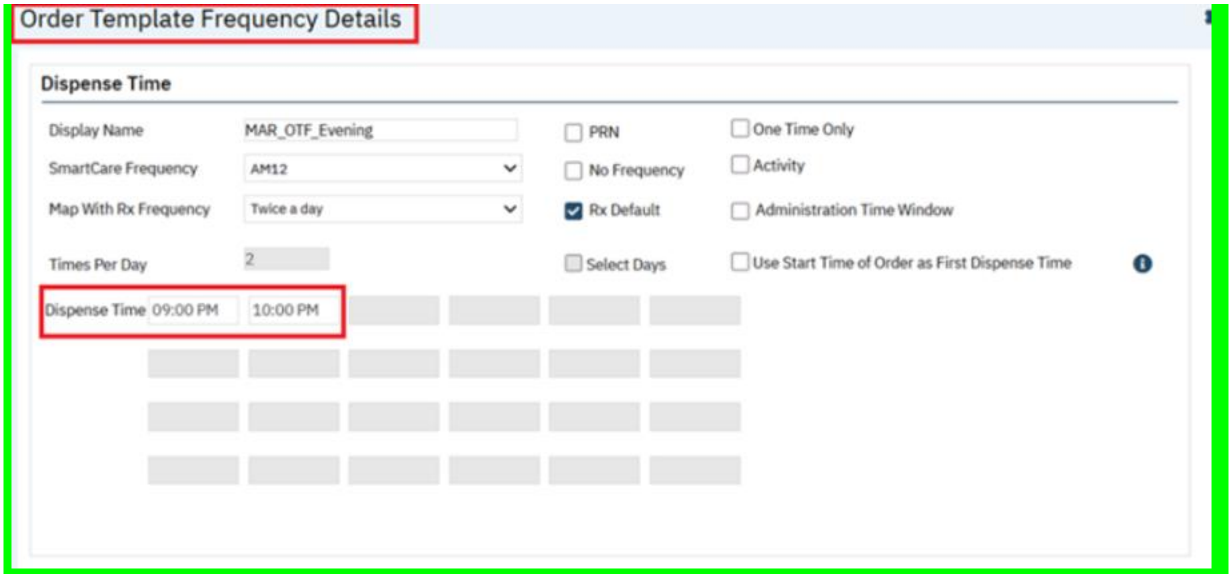
The following changes have been implemented in the '**Order Template Frequency Details**', '**Client MAR', 'Client Orders'** and **Rx Medication** screens.

1. In the Administration section, a trigger has been implemented on the Order Template Frequency to prevent changes when active Client Orders or Client Medications exist with current or future-dated MAR schedules. This ensures that frequency modifications do not disrupt or invalidate existing MAR schedules.

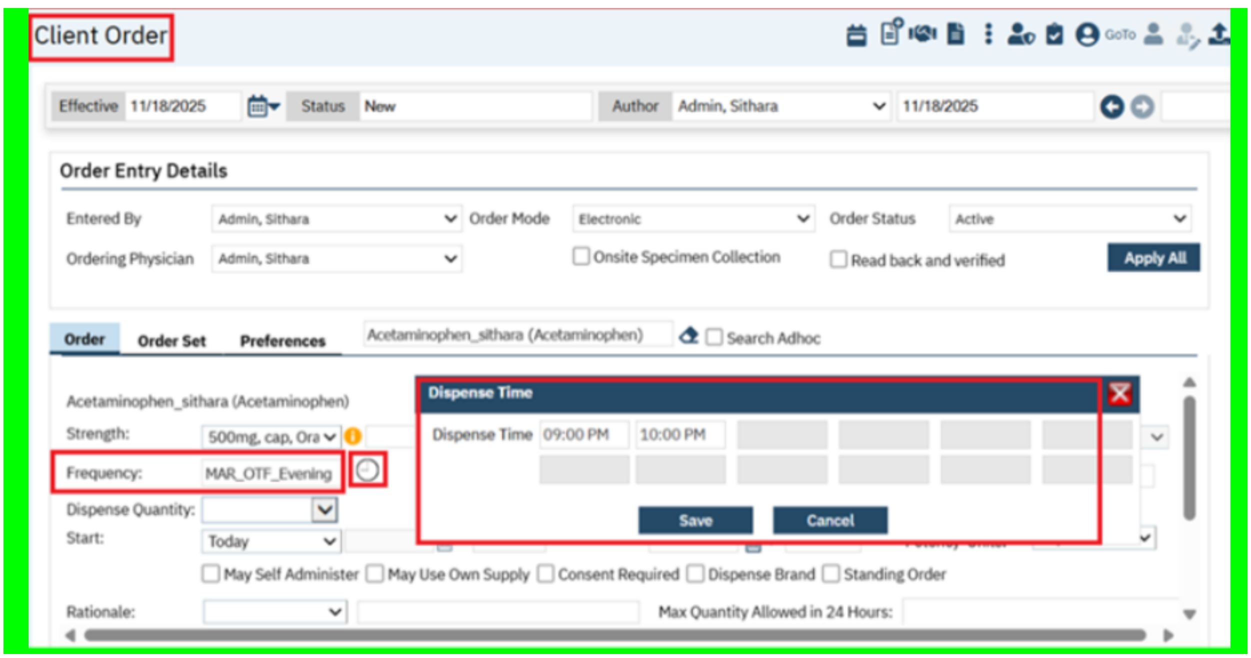


2. **Dispense time changes using the Clock functionality in the Client Orders module** – When the dispense time for a selected Frequency is modified using the clock icon in the Client Orders screen and the order is subsequently signed, the MAR records will now be created using the overridden dispense time. These MAR entries will correctly display in the Client MAR screen with the updated time, and no duplicate MAR records will be created or shown.

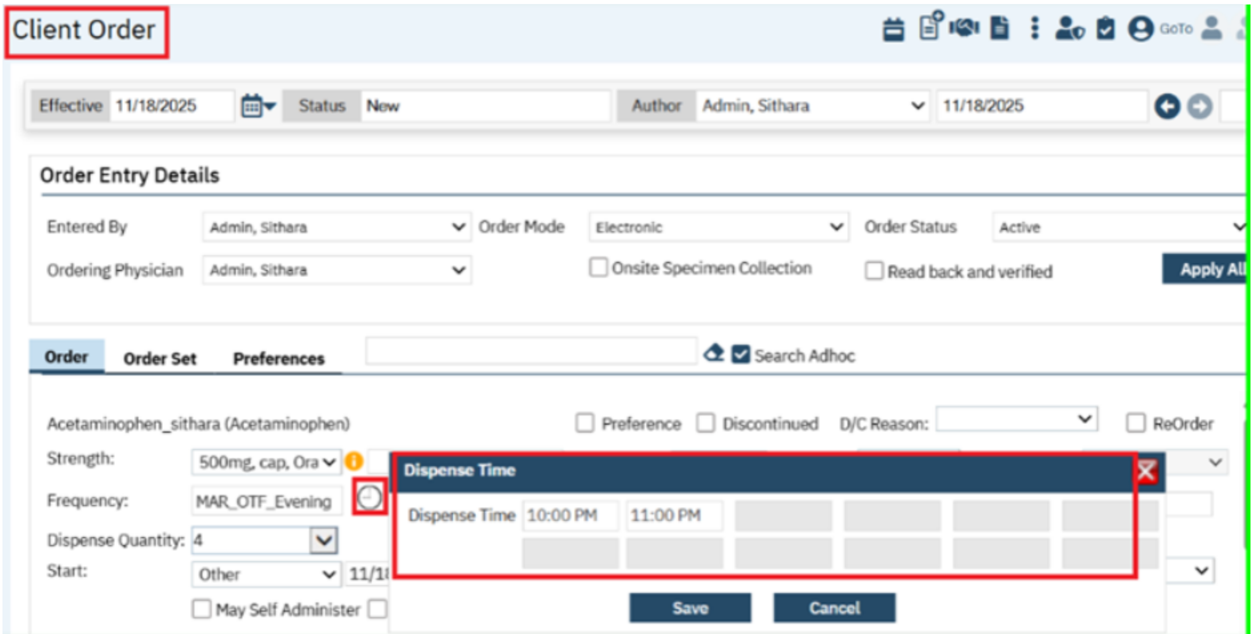
When the Order Frequency is set for 9:00PM and 10:00PM



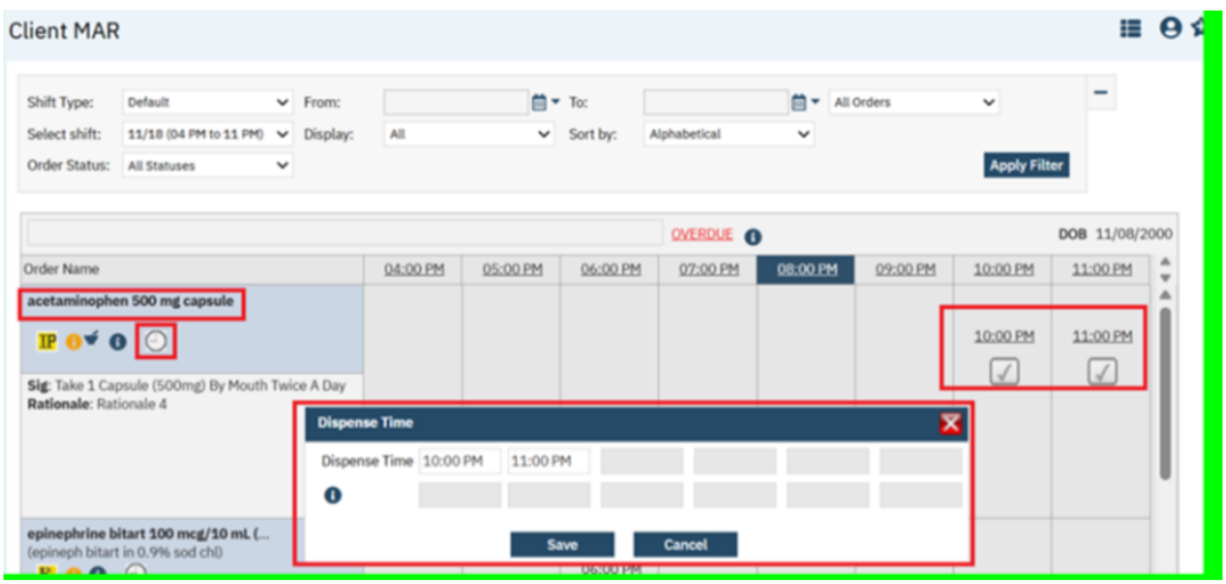
The default Dispense time is displaying in the Client order screen for the Medication Orders:



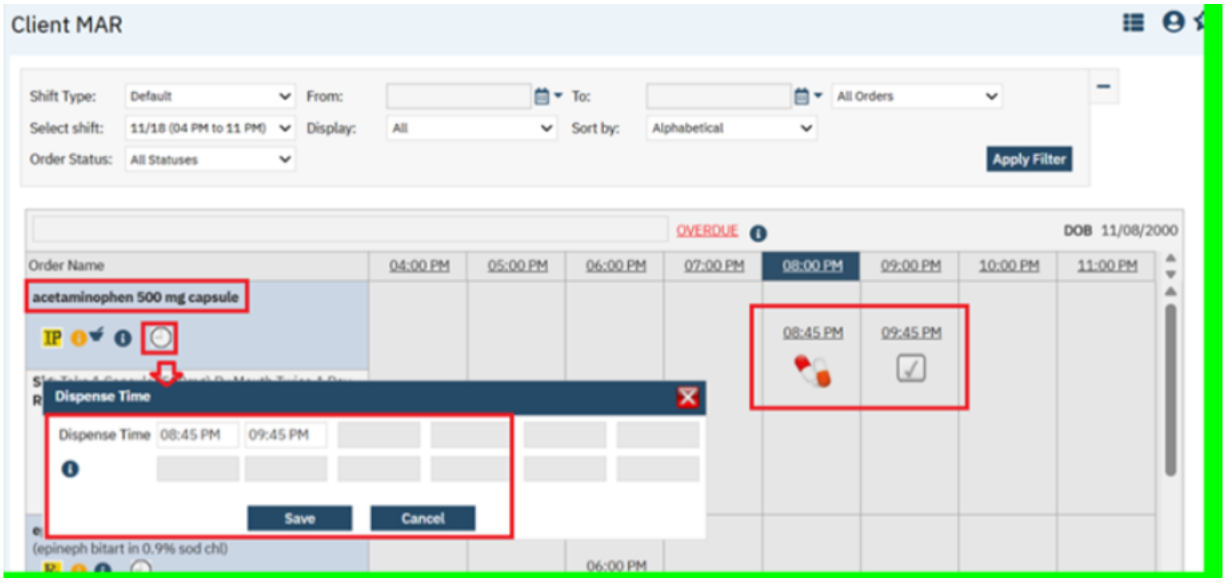
Now override the Dispense time from the Client Order screen- Clock icon.



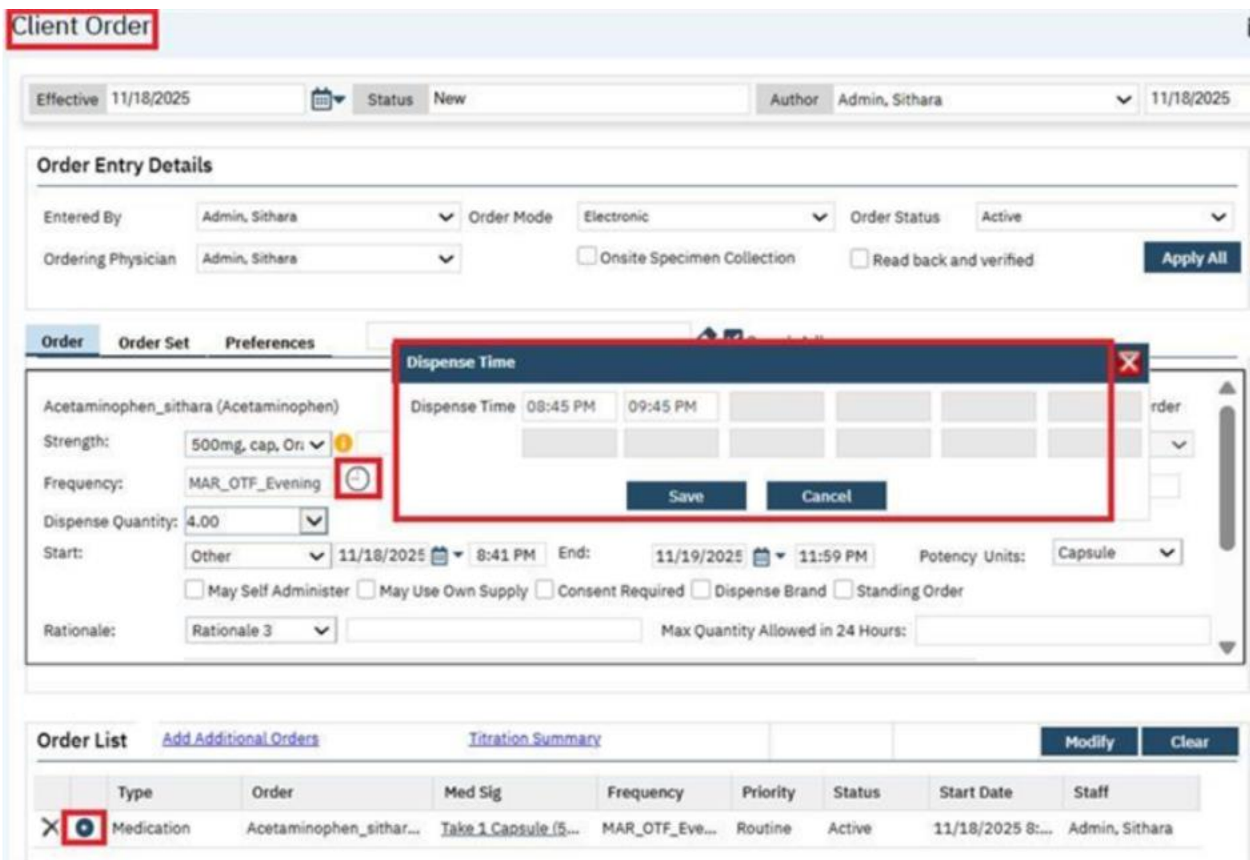
Client MAR screen is displayed with the overridden dispense time for the Signed Medication Order.



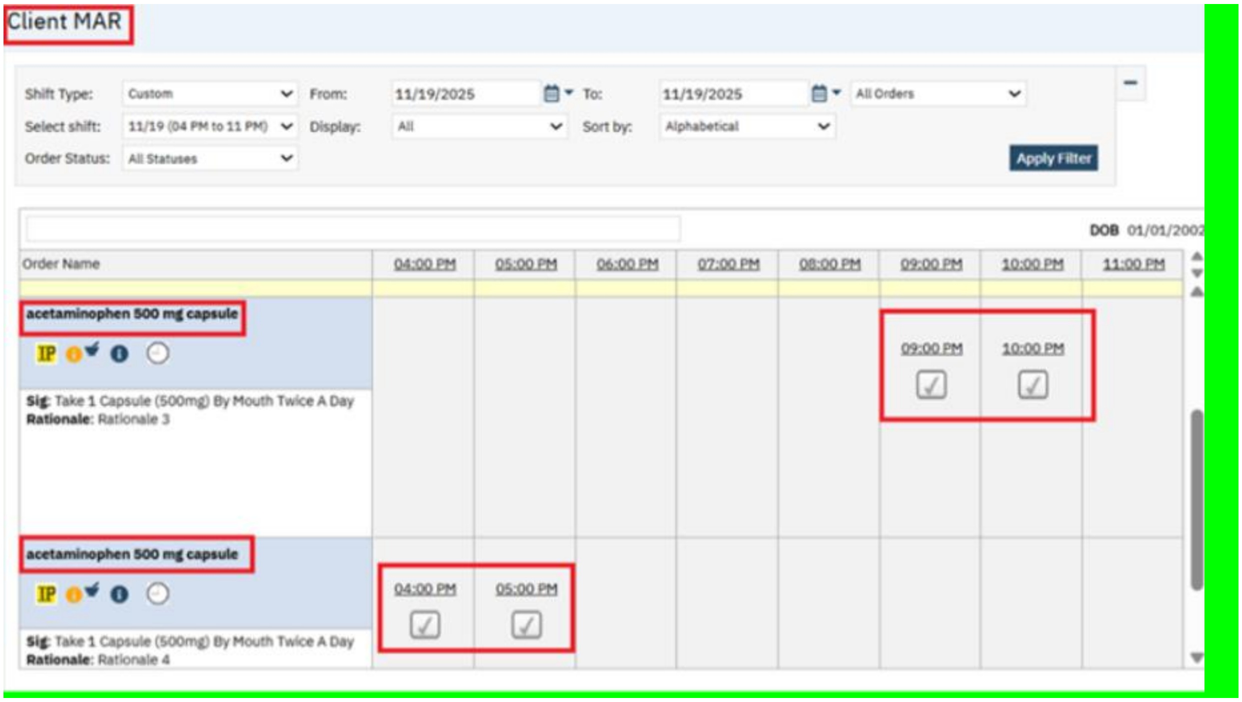
3.Dispense time changes using the Clock functionality in the MAR module – When the Frequency dispense time is modified using the clock icon in the Client MAR screen, the MAR records will now be displayed with the updated dispense time upon saving.



Additionally, when the same order is selected for modification in the **Client Orders** screen, clicking the clock icon will display the most recently modified dispense time.



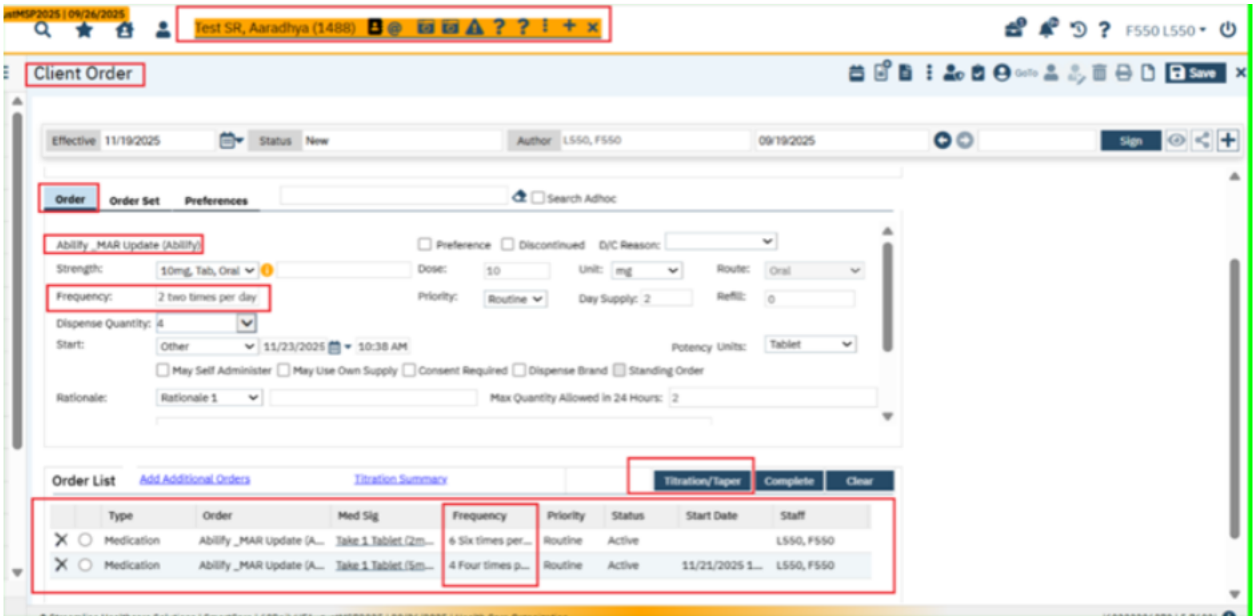
4.Overlapping orders with different dispense times – When an order is created for a client using the same medication and frequency but with a different dispense time, duplicate MAR records will no longer be created. In such cases, a warning message will be displayed to inform the user that duplicate or overlapping orders exist.



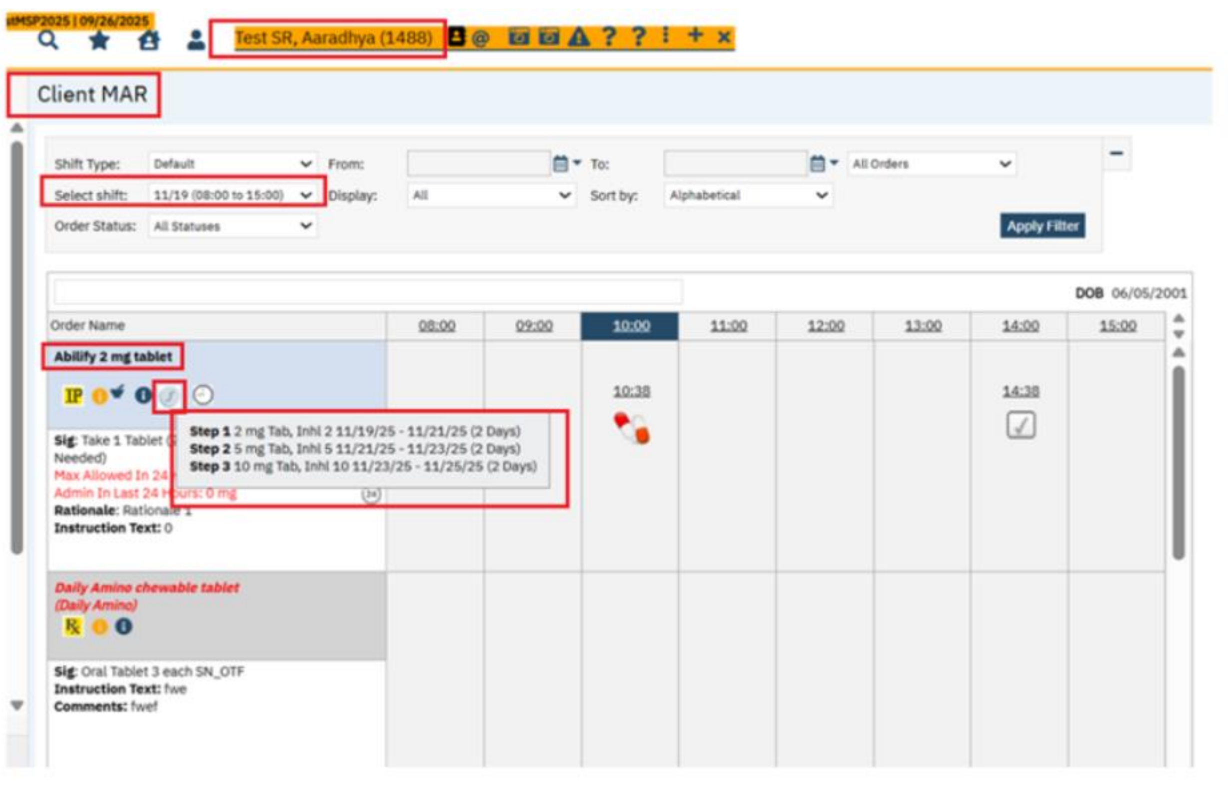
5.Completion of Client Orders – When client order(s) are marked as Completed from either the Client Orders list page (using Bulk Update in the Status dropdown) or the Client Order Details screen, the corresponding MAR records will also be marked as completed. No new MAR records will be created in the Client MAR screen once the order has been completed.

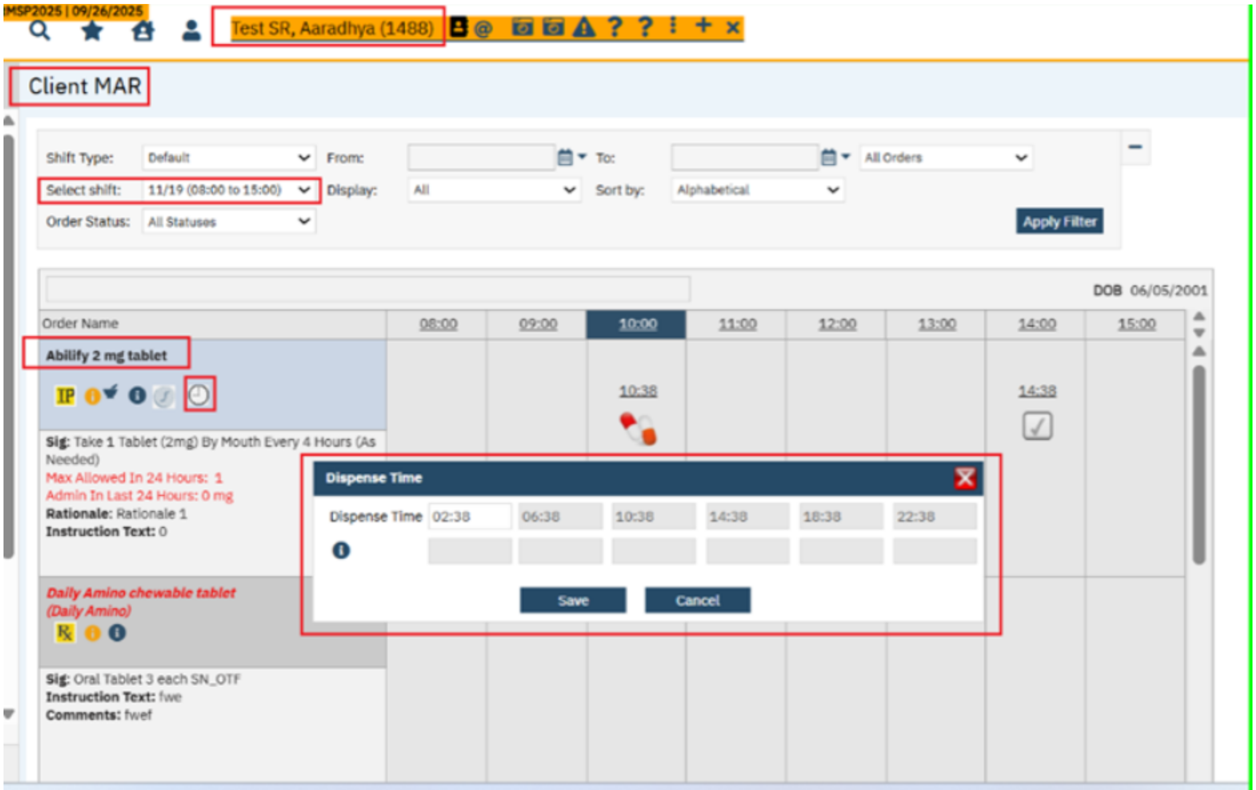
6.Removal of the 'Use Default' button – The 'Use Default' button has been removed from the Dispense Time pop-up (accessed via the clock icon) in both the Client MAR and Client Orders screens.

7.Correct MAR generation for Titration Orders / Order Sets (Multiple Step) – When signing titration orders or multi-step order sets in the Client Orders screen—and the frequency is configured to "Use Start Time of Order as First Dispense Time"—the system will now generate MAR records correctly in the Client MAR screen. MAR entries will no longer be created before the Order Start Date/Time; instead, they will be generated accurately based on the configured frequency settings, beginning from the defined Order Start Date/Time.

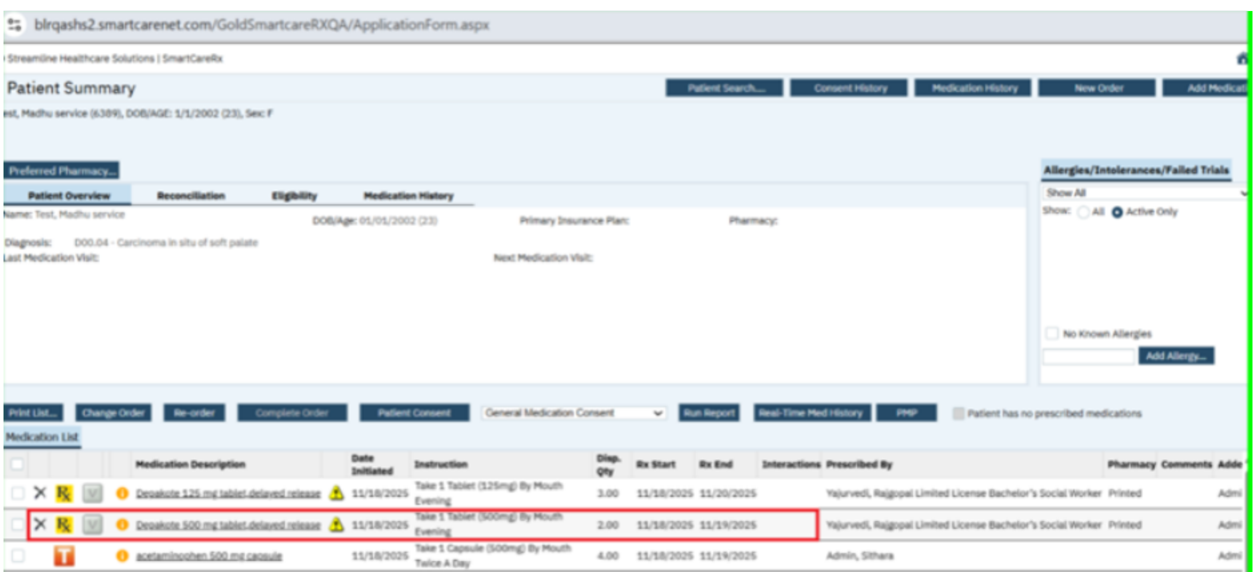


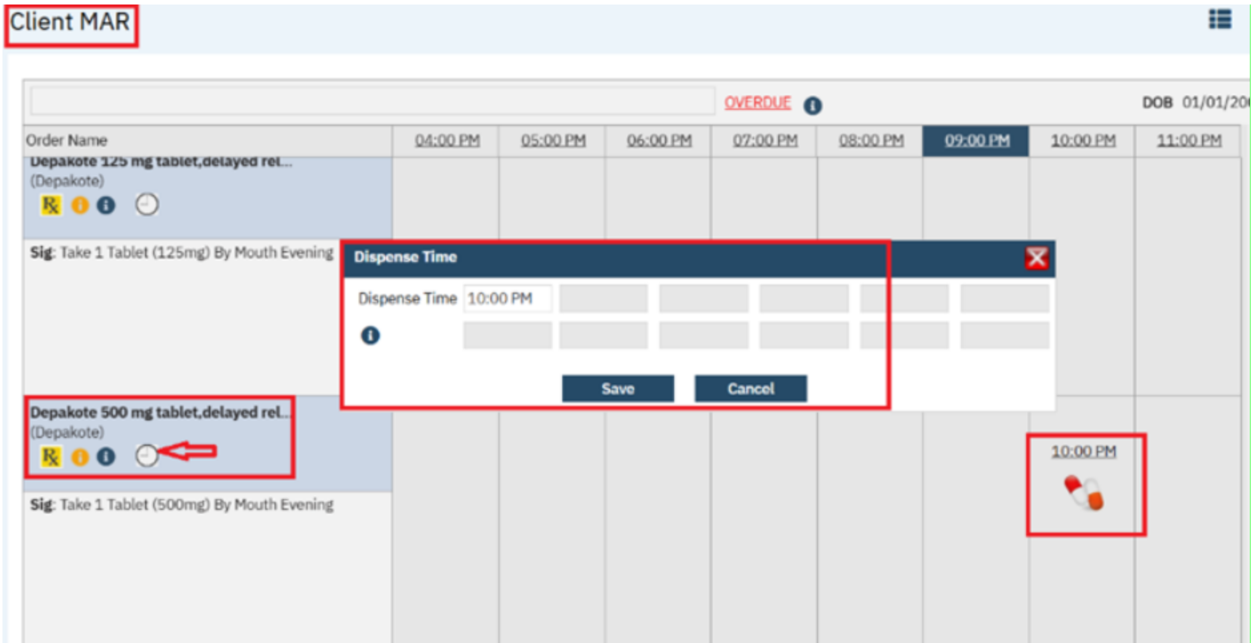
Within the **Client MAR**, an order is created containing three titration steps, and the system generates the corresponding MAR records.





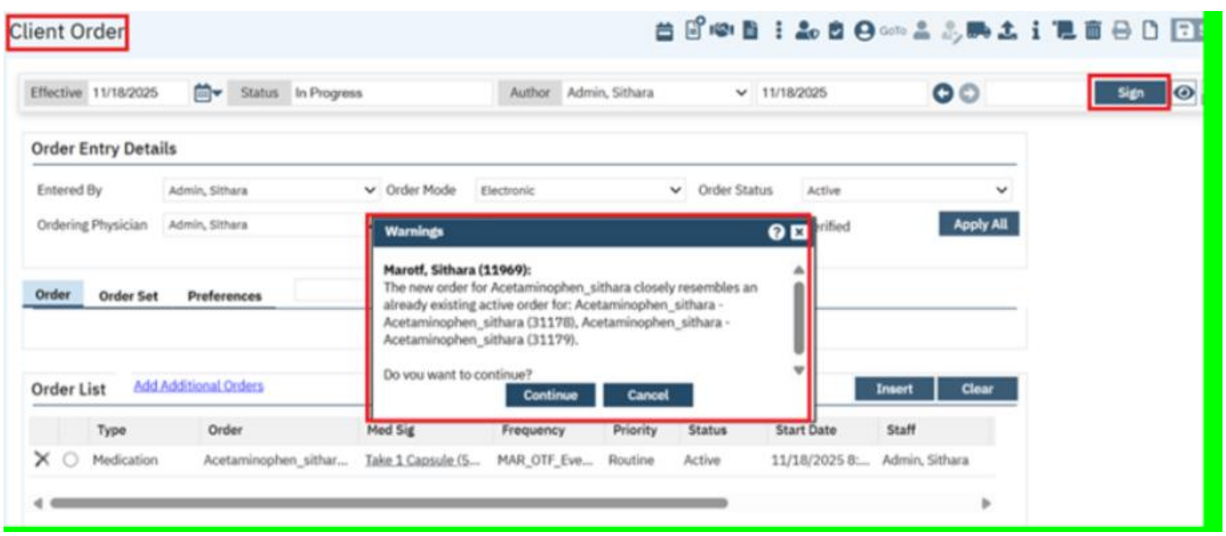
8.MAR display and dispense time updates for Rx Medication orders – When an Rx Medication order is created, it will now appear on the Client MAR screen. The dispense time can be modified using the clock icon, and the updated time will be applied to the Rx order without creating duplicate MAR records.



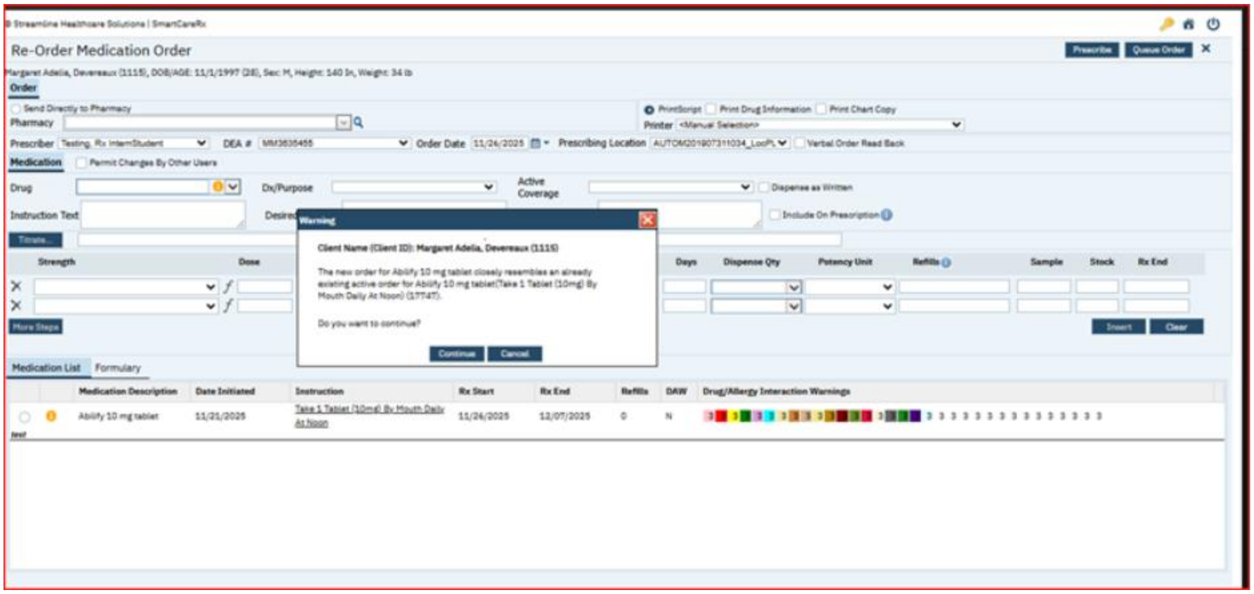


9.Updated configuration for overlapping medications – When the configuration key *ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders* is set to 'Rx and Client Orders', the system will display a warning message on both the SmartCare and Rx Medication screens whenever a duplicate order is detected.

Warning message is displayed on the Client Orders screen:



Warning message displayed on the Rx Medication screen:



Data Model Changes:

OrderTemplateFrequencyOverrides table: Added a new column **'IsUserOverride'**

- **MedAdminRecords** table: Added the following new columns:
  1. **HasAuditIssue**
  2. **AuditSeverity**
  3. **LastAuditDate**
- New table created: **'MedAdminAuditLog'** - used for **MAR Schedule Review & Notification**.

Note : For additional information on the MAR Schedule Review and Notification, please reference MAR Schedule Review & Notification article.

Where To Find It:

Path 1: 'Client' search - 'Client Orders' screen - Click on 'New' icon - Search and select a 'Medication Order/Titration Order' - Select 'Frequency' - Enter required data and click on 'Insert' button- Click on 'Save/Sign' -Navigate to the 'Client MAR' screen-Verify the signed order.

Path 2: 'Client' search - 'Client Orders' screen - Click on 'New' icon- Search and select a 'Medication Order' - Select 'Frequency' – Click on 'Clock' icon -Modify the dispense time and save it- Enter required data and click on 'Insert' button - Click on 'Save/Sign' - ' Navigate to the Client MAR' screen-Verify the signed order.

Path 3: 'Client' search - 'Client MAR' screen - Click on the 'Clock' icon -Modify the dispense time for a MAR record and save it - Observe the MAR record dispense time.

Path 4: Select Client- Go search- 'Medication Management (Rx)' screen- Create a medication order - Enter required data - Click on insert button -Click on 'Prescribe' button- Navigate to 'Client MAR' screen (SmartCare).

~~Core Assessment~~

~~Reference No~~	~~Task No~~	~~Description~~
~~65~~	~~Core Bugs # 133702~~	~~Assessment: Modified data in the 'Age of First Use' field was disappearing.~~

~~65. Core Bugs # 133702: Assessment: Modified data in the 'Age of First Use' field was disappearing.~~

~~What's Fixed:~~

~~Users can now modify the data in the 'Age of First Use' field even after saving or signing the Core Assessment document under the Substance Use tab.~~

~~Prerequisite:~~
~~Go Search -- Document management – Select 'Assessment (C)' – Navigate to 'Assessment' tab – Set up the configuration to display 'Substance Use' tab in the Core Assessment~~

~~Where To Find It:~~

~~Path:~~ ~~Client – Select 'Assessment (C)' – Select required 'Assessment Group, Population, and Classification' to display 'Substance Use' as tab – add required data – Save – Sign~~

Disclosure/Request

Reference No	Task No	Description
66	Core Bugs # 133649	The Disclosure PDF is not showing in the correct order for the attached documents from the 'Disclosure/Request' screen.

66. Core Bugs # 133649: The Disclosure PDF is not showing in the correct order for the attached documents from the 'Disclosure/Request' screen.

What's Fixed:

The system displays the PDF for the attached documents in the correct order in the 'Disclosure/Request' screen.

Pre-requisite:

Some signed documents to be present for the client with different date range.

Where To Find It:

Path: Client Search – Select a client – open 'Disclosure/Request' screen – click on 'New' – 'Disclosure/Request Details' – enter the data – click on 'Save' – click on 'Attach Review Items Disclosed' button— Add the document randomly – click on 'OK' – click on 'Prepare' button in details screen – click on 'View/Print Disclosed Items' – PDF is displayed with ascending order of the dates for the attached documents.

Documents

Reference No	Task No	Description
67	Core Bugs # 133482	PHQ-9 Validation logic changes for 10th Question
68	Core Bugs # 133567	Suicide Risk Assessment able to be saved multiple times causing unsaved changes
69	Core Bugs # 133312	A red error was displayed in the 'Safety/Crisis Plan (C)' document after adding DFA as a tab.
70	Core Bugs # 133414	Diagnosis Document displaying Generic Validations

67. Core Bugs # 133482: PHQ-9 Validation logic changes for 10th Question

What's Fixed:

A validation logic has been updated for the PHQ-9 document. The required validation for the last question starting with: "If you checked off any problems, how difficult have…" will only apply if at least one of the first nine questions has an answer other than "0 = Not at all."

If the user answers all nine questions as "0 = Not at all," the system will not display the validation for the last question.

Where To Find It:

Path: Open a Client - 'PHQ9(client)' – Enter all the details – Validate/Sign the document.

68. Core Bugs # 133567: Suicide Risk Assessment able to be saved multiple times causing unsaved changes

What is Fixed:

The Suicide Risk Assessment document now saves successfully in a single instance without triggering unsaved changes after saving.

Where to Find It:

Path: Create/Select a 'Client' - Navigate to 'Suicide Risk Assessment' document – 'Enter all required fields' – 'Save'

---

69. Core Bugs # 133312: A red error was displayed in the 'Safety/Crisis Plan (C)' document after adding DFA as a tab.

What's Fixed:

Users can now add DFA forms to the Safety/Crisis Plan (C) document and open, save, and sign it successfully without errors.

Where To Find It:

Path: 'Screens (Administration)' - Select the core 'Safety/Crisis Plan (C)' screen - Add any DFA in the 'Form' dropdown field - 'save' - open the code Safety/Crisis Plan' document screen - verify the DFA added in the screens is displaying in the document - Fill all the required fields - 'Save' the document.

---

70. Core Bugs # 133414: Diagnosis Document displaying Generic Validations

What's Fixed:

Previously, validation messages for **Excluded Codes** and **Additional Codes** were **generic**, making it difficult for users to identify which ICD-10 codes were required or excluded.
Now, the validation messages **include specific ICD-10 codes** that need to be excluded or added, instead of displaying generic text.

Example:

Validation Message for Excluded Codes:
Diagnosis - F33.1 is Excluded (not permitted) with F32

Validation Message for Additional Codes:
Diagnosis - C00 requires any one of Additional Code: (F10.-, F17.-, Z72.0, Z87.891)

Pre-requisite: Set configuration key REQUIREDIAGNOSISCONDITIONVALIDATION to 'Y'

Where To Find It:

Path - Open Client - 'Diagnosis' Document – Add Excluded Codes -> Sign

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Dynamic Forms

Reference No	Task No	Description
71	Core Bugs # 133521	Custom Table Grid Duplicates

71. Core Bugs # 133521: Custom Table Grid Duplicates.

What's Fixed:

The records inserted via a stored procedure in the **Form Section Groups** under the **DFA Editor** screen will no longer be duplicated in the table.

Where To Find It:

Path: 'Administration' - 'Forms' - DFA Editor' Screen.

External Email

Reference No	Task No	Description
72	Core Bugs # 133484	External Staff members were not displayed in the 'External Email' popup.

72. Core Bugs # 133484: External Staff members were not displayed in the 'External Email' popup.

What's Fixed

The External Staff who need to receive 'External Emails' is needs to get configured with 'Allow External Email' checkbox selected, in addition to the previous configuration. i.e

i) The external user needs to provide a valid Email Id (Staff Details screen – 'General' tab – 'Staff' section – E-mail ID)

ii) The external user need not be able to Login, hence select 'Can't login' radio button in the Access rights ('Access Rights' section – Can't login)

iii) 'External Email' permission item is granted for the External Staff's Roles/Permissions (By granting this Permission Item, the user will start displaying in the External Staff Dropdown) ('Roles/Permissions' tab – 'Permissions' section – Click on 'Select Permission type' dropdown – Select 'Staff List' in the dropdown – click on Apply filter – Permission Item 'External Staff' is granted)

Where To Find It:

Path: Login to 'SmartCare' application – 'Client' search -- Select a Client – 'Documents list page' – select any 'Document' – 'Sign' – Click on 'Ellipse' icon – Select the 'External Email' button – 'External Email' pop-up – 'External Staff' dropdown.

Flow Sheet

Reference No	Task No	Description
73	Core Bugs # 133519	Flow Sheet - Non-staff data record is missing in the flowsheet.

73. Core Bugs # 133519: Flow Sheet - Non-staff data record is missing in the flowsheet.

What's Fixed:

When a Non-staff user creates or modifies a Flow Sheet entry, it displays on the Flow Sheet list page.

Where to Find It:

Path : Login as a Non -Staff user -- Perform Client Search --- Select Client --- Navigate to Flow Sheet --- Client --- Flow Sheet List Page --- In Vital History tab --- Select Meaningful Use/ Vitals template --- From Add Flow Sheet dropdown filter --- Click on New Icon --- New Entry Flow Sheet Detail page --- Enter all required fields --- Click on Save Icon.

~~Foster Care~~

~~Reference No~~	~~Task No~~	~~Description~~
~~74~~	~~Core Bugs # 133487~~	~~Client Suffix is not displayed in Client Header~~

~~74. Core Bugs # 133487: Client Suffix is not displayed in Client Header~~

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

~~When the Client has a Suffix and user in on the 'FC Client Summary' screen, the Client Header displays the client's name in the format: Last Name, Suffix, First Name.~~

~~**Pre-requisite:** Create/Select a 'Client' – Navigate to 'Client Information' screen – Add 'Suffix' – 'Save'~~

~~**Where To Find It:**~~

~~**Path**: Select the same client which was selected in the pre-requisite – Search and navigate to 'FC Client Summary' screen~~

Group Services

Reference No	Task No	Description
75	Core Bugs # 133492	Group Services: Set All/Set Some buttons were not working in the Custom Fields tab.

75. Core Bugs # 133492: Group Services: Set All/Set Some buttons were not working in the Custom Fields tab.

What's Fixed:

When the user adds values and sets them for one client in the 'Custom Fields' tab, clicking the 'Set All' or 'Set Some' button applies the values to the remaining clients in the group.

Where To Find It:

Path 1: 'My office' -- 'Groups' -- 'Groups' List page -- Click on New Icon -- 'Group Detail' page -- Enter all the required fields in General tab -- Click on the Save button -- Navigate to the 'Schedule' tab -- Click on 'New Group Service' button -- Group Service Clients pop-up -- Select Date of Service and Clients -- Click on 'Select' button.

Path 2: Navigate to 'Group Service Detail' Screen -- 'Group' tab --- Navigate to 'Group Details' tab --- Ensure all details in Group section are initialized correctly -- Navigate to 'Services' tab -- Enter all the required fields in the 'Service Information' Tab -- Navigate to 'Custom Fields' tab -- Enter all the required fields -- Click on 'Set All' or 'Set Some' button.

Messages Interface

Reference No	Task No	Description
76	Core Bugs # 133488	The HL7 ADT messages were not processing successfully

76. Core Bugs # 133488: The HL7 ADT messages were not processing successfully

What's Fixed:

We have removed the extra line space in the ADT NK1 segment related to the Client Contact address, which prevented HL7 ADT messages from processing successfully and left them stuck in the status "Ready for Processing." The system now processes and delivers all HL7 ADT messages to the interface successfully. The system also updates the status of all processed HL7 ADT messages to "Finalized."

Where To Find It:

Path 1: Client Information -- Contacts -- Add Client Contact as Next of Kin -- Enter Client Contact Address (Address Line 1, Address Line 2, City, State, Zip) -- Save

Path 2: Messages Interface (Administration) -- Messages Interface List -- Message ID -- Message Interface Detail.

~~Methadone~~

~~Reference No~~	~~Task No~~	~~Description~~
~~77~~	~~Core Bugs # 133388~~	~~MAT: The Face-to-Face doses did not change the status back to "In Progress".~~
~~78~~	~~Core Bugs # 133537~~	~~In 'MAT Bottle Transaction Summary Report' only one row is displayed for each bottle with one day transactions.~~
~~79~~	~~Core Bugs # 133424~~	~~MAT Management Details screen: After refreshing the browser, the user is unable to disconnect the Machine/Inventory connection.~~
~~80~~	~~Core Bugs # 133570~~	~~MAT Management Details: printed label does not display Phone number consistently.~~
~~81~~	~~Core Bugs # 133478~~	~~MAT Client Order: Not getting validation to return the Pre pours while signing new Client Order~~
~~82~~	~~Core Bugs # 133503~~	~~MAT: Updated all reports to reflect changes in date-time format and time zone.~~
~~83~~	~~Core Bugs # 133667~~	~~Formatting issues with the MAT Spilled Medication by Date and MAT Pre Pour Transactions Reports when exporting to PDF.~~

~~77. Core Bugs # 133388: MAT: The Face-to-Face doses did not change the status back to "In Progress".~~

~~What's Fixed:~~

~~In the MAT Management list screen, for the a Client, when any Take Home dose is reverted, the~~ **~~Face To Face Status~~** ~~will change to~~ **~~In Progress~~** ~~and the~~ **~~reverted Take Home status~~** ~~will remain~~ **~~Scheduled~~**~~.~~

~~Prerequisite:~~
~~The Take Home MAT Order is signed for the respective Client.~~

~~Where To Find It:~~

~~Path:~~ ~~'My Office' MAT Management List page.~~

~~78. Core Bugs # 133537: In 'MAT Bottle Transaction Summary Report' only one row is displayed for each bottle with one day transactions.~~

~~What's Fixed:~~

1. ~~The 'MAT Bottle Transaction Summary Report' displays a separate row for each day's transaction for each bottle.~~

2. ~~The 'MAT Bottle Transaction Summary Report' data will be sorted in the following order:~~

   ~~a. First: Location (Ascending)~~

   ~~b. Second: Medication Type (Ascending)~~

   ~~c. Third: Medication (Ascending)~~

   ~~d. Fourth: Bottle/Box ID (Ascending)~~

   ~~e. Fifth: Transaction Date (Descending)~~

~~**Prerequisites:** Ensure that transactions are made for a bottle on multiple dates.~~

~~**Where To Find It:**~~

~~**Path 1:** 'My Office' – 'Mat Management' – 'Mat Management Details' – 'Dispense'~~

~~**Path 2:** 'My Office' – 'Reports' – 'MAT Bottle Transaction Summary Report' – Select Filters – View report.~~

~~79. Core Bugs # 133424: MAT Management Details screen: After refreshing the browser, the user is unable to disconnect the Machine/Inventory connection.~~

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

~~After refreshing the browser, the user can disconnect the machine/Inventory connection from the MAT Management Details screen.~~

~~As part of this task, we have removed the close (X) button from the pop-up that appears during the machine/inventory connect and disconnect process.~~

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

~~**Path 1:** Administration - Orders' - Orders' list page - New - Order Details' screen -Select 'Medication' Order Type - Enter the required fields - Select (Medication Assisted Treatment (MAT), Machine Connection Required, Take Home Allowed) = Yes, - under 'Medication Assisted Treatment' section and display program? Must be 'Yes' for MAT Orders – Save~~

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

~~**Path 3:** 'Client'- 'Client Orders' - 'Client Orders' list page - New - 'Client Order details' screen - Select the Order created in Navigation Path 1 - Enter the required fields –Select the Take home days - select Program –Insert –click on 'save' and 'Sign'.~~

~~**Path 4:** 'My Office' - 'MAT Management 'list page – click on 'Connect User' icon – Connection Details pop up will be displayed – select the Machine/Inventory - and other required fields – Click on 'Verified' check box – and click on connect – Machine/Inventory get connected.~~

~~**Path 5:** 'My Office' - 'MAT Management 'list page – Select the Order (Navigation path 3) – MAT Details screen – refresh the browser – Try to disconnect the Machine/Inventory - Machine/Inventory will get disconnected.~~

~~80. Core Bugs # 133570: MAT Management Details: printed label does not display Phone number consistently.~~

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

~~The printed label now displays the connected Machine/Inventory Clinic's Location phone number on the 'MAT Management Details' screen during a Take Home dispenses.~~

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

- ~~The MAT Order is signed for the selected Client.~~

~~**Where To Find It:**~~

~~**Path:** My Office -- 'MAT Management' -- 'MAT Management' List Page -- Click on Dispense Icon for the selected client -- 'MAT Management Details' screen -- Click on 'Sign' -- Click on 'Take Home' icon for dispense.~~

~~81. Core Bugs # 133478: MAT Client Order: Not getting validation to return the Pre pours while signing new Client Order.~~

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

~~When a pre-pour exists, the Client Order Details screen now triggers the below validation message on creating overlapping orders, modifying, or discontinuing the same order.~~

~~**Validation Message:** "Staff need to return the pre-pours to inventory for this client before modifying or ending the client order"~~

~~**Pre-requisite:** MAT Order to be signed for the selected Client.~~

~~**Where To Find It:**~~

~~**Path 1:** MAT Management List Page - Click on Dispense Icon – MAT Management Details screen – Sign - Select 'Commence Prepour' checkbox – Prepour Face to Face and Take Homes.~~

~~**Path 2**: 'Client' -- Client Orders -- New -- Client Order Details.~~

~~82. Core Bugs # 133503: MAT: Updated all reports to reflect changes in date-time format and time zone.~~

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

~~1. In the MAT Summary of Medication Inventory on Hand report, the Date Received field now displays the date only for transactions of type 'Received'.~~

~~2.The Date Time Format of the below -mentioned reports have been modified for 'Report Run On' from hh:mm:ss to hh:mm.~~

- ~~MAT Jail Report~~
- ~~MAT Transaction By Bottle~~
- ~~MAT Summary of Medication Inventory on Hand~~
- ~~MAT Summary Of Daily Total Dispensed Amounts~~

- ~~MAT Spilled Medication By Date~~
- ~~MAT Pump Transaction Report~~
- ~~MAT Pre Pour Transactions Report~~
- ~~MAT No Show Clients Report~~
- ~~MAT Monthly DEA Report~~
- ~~MAT Medication Dispensing Exception Report~~
- ~~MAT Light house Report~~
- ~~MAT Emergency Dispensing Report~~
- ~~MAT Dispense And No Show History~~
- ~~MAT Destroyed Inventory by Bottle~~
- ~~MAT Bottle Transaction Summary~~

~~**Where To Find It:**~~

~~**Path1:** 'My Office' – 'Reports' – 'MAT Summary of Medication Inventory on Hand report'~~

~~**Path2:** 'My Office' – 'Reports' – 'MAT Jail Report'~~

~~**Path3:** 'My Office' – 'Reports' – 'MAT Transaction By Bottle'~~

~~**Path 4**: 'My Office' – 'Reports' – 'MAT Summary Of Daily Total Dispensed Amounts'~~

~~**Path5:** 'My Office' – 'Reports' – 'MAT Spilled Medication By Date'~~

~~**Path6:** 'My Office' – 'Reports' – 'MAT Pump Transaction Report'~~

~~**Path7:** 'My Office' – 'Reports' – 'MAT Pre Pour Transactions Report'~~

~~**Path8:** 'My Office' – 'Reports' – 'MAT No Show Clients Report'~~

~~**Path9:** 'My Office' – 'Reports' – 'MAT Monthly DEA Report'~~

~~**Path10:** 'My Office' – 'Reports' – 'MAT Medication Dispensing Exception Report'~~

~~**Path11:** 'My Office' – 'Reports' – 'MAT Light house Report'~~

~~**Path12:** 'My Office' – 'Reports' – 'MAT Emergency Dispensing Report'~~

~~**Path13:** 'My Office' – 'Reports' – 'MAT Dispense And No Show History'~~

~~**Path14:** 'My Office' – 'Reports' – 'MAT Destroyed Inventory by Bottle'~~

~~**Path15:** 'My Office' – 'Reports' – 'MAT Bottle Transaction Summary'~~

~~83. Core Bugs # 133667: Formatting issues with the MAT Spilled Medication by Date and MAT Pre Pour Transactions Reports when exporting to PDF.~~

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

~~When the reports 'MAT Spilled Medication by Date' and MAT Pre Pour Transaction Report are exported to PDF, the downloaded files display the sub-header section only on the first page and report header and body displays without any formatting issues.~~

~~**Prerequisite:**~~

~~MAT Order is signed for the selected Client.~~

~~**Where To Find It:**~~

~~**Path 1:** My Office' – 'MAT Spilled Medication by Date' Report - Click the Export button - select PDF.~~

~~**Path 2:** My Office' – 'MAT Pre Pour Transaction Report - Click the Export button - select PDF.~~

My Reports

Reference No	Task No	Description
84	Core Bugs # 133431	The date of service, service Id and procedure columns are not mapped correctly in the 'Client Program Enrollment Without Active Coverage' report.
85	Core Bugs # 133559	My Reports: error while running ER file Detail report
86	Core Bugs # 133515	ER ClaimLineErrors Report issue.

84. Core Bugs # 133431: The date of service, service Id and procedure columns are not mapped correctly in the 'Client Program Enrollment Without Active Coverage' report.

What's Fixed:

The system now displays a blank row between the records in the 'Client Program Enrollment Without Active Coverage' report, and it correctly maps DOS, Service ID, and Procedure Code for each record.

Where To Find It:

Path: 'My Office' -- 'My Reports' -- 'My Reports' list page -- Select 'Client Program Enrollment Without Active Coverage' report.

85. Core Bugs # 133559: My Reports: error while running ER file Detail report

What's Fixed:

Users can generate the ER File Detail report even when the Service Program exceeds 100 characters. The report displays all data as expected.

Pre-requisite: Process an 835 file (ERfileID) where the 'Service Program' that has more than 100 characters and to make a note of the corresponding ERfileID.

Where To Find It:

Path : 'My Office' -- 'My Reports' -- search for 'ER File Detail' report -- click on report name hyperlink -- report will be opened in a new URL window -- enter the required ER file ID (835 file (ERfileID) that has a program name longer than 100 characters) -- click on 'View Report' button.

86. Core Bugs # 133515: ER ClaimLineErrors Report issue.

What's Fixed:

The system no longer displays the below error message and users can successfully open and view **ER Claim Line Errors** reports

Error message- An error has occurred during report processing. (rsProcessingAborted) Query execution failed for dataset 'ssp_ReportGetERClaimLineErrors'. (rsErrorExecutingCommand)

Where To Find It:

Path 1: Services (Client) - Service list page- click on new icon - create a multiple service with different procedure and same location.

Path 2: 'My Office' – 'Charges/Claims' – 'Charges/Claims' list page- Select all service as mentioned in navigation path1- click on e-claim button- process now- generate the claim file.

Path 3: Convert 837 to 835 file and get the ER file number.

Path 4: Go Search -- Payment/Adjustment- Click on Electronic Remittance button- ER process pop up- select the ER file number and click on process.

Path 5: Go Search – My reports- search with text "ER" -- apply filter --click on "ER Claim Line errors" – apply the ER file number-click on "View report".

Nightly Billing job

Reference No	Task No	Description
87	Core Bugs # 132166	interference with the ongoing service completion workflow

87. Core Bugs # 132166: interference with the ongoing service completion workflow

What's Fixed:

The ServiceCleanup process has been moved from ssp_PMCompleteShowServices to ssp_PMCompleteShowServicesPostProcessing, ensuring it no longer disrupts the service completion workflow. This change allows the service completion logic to execute cleanly before any cleanup operations are performed.

Where to Find It:

Path: N/A

Patient Portal

Reference No	Task No	Description
88	Core Bugs # 133494	Client signature not displayed properly in the PDF when the document is signed by the patient in the Patient Portal.
~~89~~	~~Core Bugs # 133587~~	~~SMARTPortal Demographics Updates not reflecting in Intelichart~~
~~90~~	~~Core Bugs # 133661~~	~~Intelichart Patient Portal displayed only the first character of the entered text.~~

88. Core Bugs # 133494: Client signature not displayed properly in the PDF when the document is signed by the patient in the Patient Portal.

What's Fixed:

The system now correctly determines the configured ImageServer location and writes PDFs to the correct server for full documents and now the client signature is displayed properly in the PDF when the document is signed by the patient through the Patient Portal

Where to Find It:

Path 1: Client - Documents - Document Name link - Document PDF

Path 2: Login to the Patient Portal using Valid Credentials

~~89. Core Bugs # 133587: SMARTPortal Demographics Updates not reflecting in Intelichart~~

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

~~The system now correctly displays the updated address in both the SmartCare application and the Intelichart Portal once the patient modifies their address in the Patient Portal and the change is approved in the Intelichart Portal.~~

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

~~**Path 1:** Client - Client Information - Address~~

~~**Path 2:** Login to the Patient Portal using Valid Credentials – modify the address~~

~~**Path 3:** Login to the Intelichart using valid credentials~~

~~90. Core Bugs # 133661: Intelichart Patient Portal displayed only the first character of the entered text.~~

~~What's Fixed:~~

~~When a user signs a document containing a text area field (such as Comments), the Intelichart Patient Portal displays full comment text instead of only the first character of the entered text in the Patient Portal document~~

~~Where to Find It:~~

-

~~Path 1:~~ ~~Client – Documents – select any document – Enter the data – Sign~~

~~Path 2:~~ ~~Login to the Interlichart using valid credentials~~

Quick Orders

Reference No	Task No	Description
91	Core Bugs # 133534	Quick orders: Comments containing & special character truncating in the PDF

91. Core Bugs # 133534: Quick orders: Comments containing & special character truncating in the PDF

What's Fixed:

When adding an quick order with comments containing **&** special character, the comment is not truncated after special character **&** in the Quick Order PDF

Where To Find It:

Path 1: Go search – Orders - New - Order Details screen - Select Lab Order Type – Select Quick Order = Yes radio button in Order Setup section - Enter the required fields - Save.

Path 2: 'Client'- 'Quick Orders' – Click on New icon - Select Order created in Path 1 – Enter the required details – Enter the text containing & character/special characters in the comment textbox – Click on Add Order – Click on Sign.

Reception

Reference No	Task No	Description
92	Core Bugs # 133675	Front Desk list page: Export button not working

92. Core Bugs # 133675: Front Desk list page: Export button not working

What's Fixed

The Phone Number column exports to the downloaded file for the Front Desk list page.

Where To Find It:

Path: My Office – Front Desk list page – Click on Export icon

Resource Calendar

Reference No	Task No	Description
93	Core Bugs # 133510	Resource Calendar – Calendar time-frame levels are not adjusted correctly when zoomed out.

93. Core Bugs # 133510: Resource Calendar – Calendar time-frame levels are not adjusted correctly when zoomed out.

What's Fixed:

The time-frame labels and event blocks are now properly aligned, horizontal overflow has been eliminated, and the calendar adjusts correctly when zoomed out.

Where To Find It:

Path: Navigate to 'Resource Calendar' --- Under 'My Office' --- 'Resource Calendar List' page --- Select the particular time slot --- click on the selected time frame --- 'New Entry Type popup' displays --- 'New Resource Entry' Radio button got selected --- click on 'OK' button --- 'Resource Scheduler Event' popup displays --- Add Required Fields ---- Click on 'Ok' button.

RWQM

Reference No	Task No	Description
94	Core Bugs # 133577	RWQM Rules – All Purposes filter still showing in Filter section

94. Core Bugs # 133577: RWQM Rules – All Purposes filter still showing in Filter section.

What's Fixed:

The 'All Purposes' filter from the 'RWQM Work Queue' list page and the linkage to Financial Assignments on the RWQM Work Queue List Page has been removed.

Where To Find It:

Path: 'My Office' -- 'RWQM Work Queue'

Rx Application

Reference No	Task No	Description
95	Core Bugs # 133637	Rx: Medication History Is not getting generated.

95. Core Bugs # 133637: Rx: medication History Is not getting generated.

What's Fixed:

When the user clicks on the 'Real-Time Med History' button for the first time, the medication History generates.

Prerequisites:

1. A service is created for a client
2. Medication History Request Consent Document is signed for the client

Where To Find It:

Path: Login to SmartCare Application - 'Client' – 'Medication Management Rx' – Rx Application – 'Patient Summary' screen – 'Medication History' Tab – Click on 'Real-Time Med History' button.

Services

Reference No	Task No	Description
96	Core Bugs # 133505	The 'Time In' and 'Time Out' fields defaulted to 12 AM when the user creates a Service from the 'Inquiry Details' screen.

96. Core Bugs # 133505: The 'Time In' and 'Time Out' fields defaulted to 12 AM when the user creates a Service from the 'Inquiry Details' screen.

What's Fixed:

The system does not default the 'Time In' and 'Time Out' fields to 12:00 AM when the user creates a Service from the 'Inquiry Details' screen, changes the status, and edits the 'Start Time' and 'End Time'.

Where To Find It:

Path: Client -- 'Client Inquiries' -- 'Client Inquiries' list page – click on new icon – 'Inquiry Details' screen – 'Initial' tab -- Select 'Crisis' checkbox next to 'Inquirer Information' -- 'Crisis' tab -- Select 'Program', 'Procedure Code', 'Location', 'Start Time' and 'End Time' -- Click on 'Save' icon -- Click on 'Open Service Note' hyperlink – Service Note – Change the 'Status' – Edit 'Start Time' and 'End Time'

Tracking Widget

Reference No	Task No	Description
97	Core Bugs # 133618	"The Guardian didn't cosign the document" tracked flag hyperlink is not functional in the Tracking Widget.

97. Core Bugs # 133618: "The Guardian didn't cosign the document" tracked flag hyperlink is not functional in the Tracking Widget.

What's Fixed:

Even if the flag type contains special characters, the flag hyperlink will correctly navigate to the Client Flag Details screen without any issues.

Where To Find It:

Path: Login -- Dashboard -- Tracking widget

UDS Reports

Reference No	Task No	Description
98	Core Bugs # 133483	UDS Section K: Meets Numerator line 20a condition for Health data Element

98. Core Bugs # 133483: UDS Section K: Meets Numerator line 20a condition for Health data Element

What's Fixed:

We have updated the Meets Numerator line 20a condition.

The system now displays a value 1 for 'Meets Numerator line 20a' column when the 'Health Data Template' - 'Name of the Template' and 'Orders' - 'Order name' matches, the LabOrder in the Health Data Template is marked as 'Yes,' and the LOINC code matches the value set OID for HIV 1 and 2 tests and the Meaningful Use set LOINC code.

Prerequisite: Client has Client orders with Health Data Template and Health Data Sub Template with Lab Order Marked as 'Yes' on Health Data Template with LIONC code.

Where to Find It:

Path: 'My Office' -- 'UDS Table 6B Details – Section K' report -- 'Meets Numerator line 20a' column

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.

There are no Global Codes for Defects.

Recodes

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

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

Ref No.	Category Code
51	'FQHC59ModifierPlans'

System Configuration Keys

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

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

Ref No.	Key Name
43	"SetActivityTrackerAutoScheduleDays"
60	"ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders"
70	"REQUIREDIAGNOSISCONDITIONVALIDATION"

Data Model Changes

Ref No.	Data Model Change
64	OrderTemplateFrequencyOverrides • New Column: IsUserOverride MedAdminAuditLog • New Column: HasAuditIssue • New Column: AuditSeverity • New Column: LastAuditDate MedAdminAuditLog

SmartCare Testing Strategy – November 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

Activity Tracker

Core Bug #133468 – Goal Plan & Activity Tracker not pulling with >30-day auto schedule; cleanup beyond Order End Date

Test Steps:

- Set SetActivityTrackerAutoScheduleDays > 30;
- run auto-schedule job.
- From Client → Goal Plan → Create Activity Type order,
- verify activities are created; confirm cleanup script removes records beyond Client Order End Date.
- Validate Client Activity Tracker displays expected entries.

Core Bug #133655 – Client field visible in Activity Tracker Report when opened from left navigation menu

Test Steps:

- Open Activity Tracker Report from left navigation menu
- confirm Client field appears in header.

Authorization

Core Bug #133606 – Correct client info in PDFs attached to Service Request Detail/Review
Test Steps:

- From Service Request List and Review/Approval, open Attachments → Document; verify PDF shows selected client's info only.

Core Bug #133629 – Insert/Modify button respects denied permissions
Test Steps:

- Deny permission DropDownList_ServiceRequests_ReviewStatus
- open Review/Approval → Approval tab
- confirm button enablement/disablement

Batch Eligibility

Core Bug #133694 – 270 process includes only enrolled Medicaid plans; excludes Traditional if not covered
Test Steps:

- Run batch eligibility
- verify plan filtering behaves as specified.

Core Bug #133676 – First/Last name length increased (35/60) for ssp_SCUpdateSubBatchResponse

Test Steps:

- Process 271 responses with long names; confirm success without failures.

Case Rate

Core Bug #133421 – Duplicate validation excludes errored/non-billable component services
Test Steps:

Attempt service completion on case rate services with errored/non-billable siblings; confirm no false duplicate warnings and completion succeeds.

CCBHC

Core Bug #133588 – Include clients in SDOH batch even without Episode Discharge Date
Test Steps:

- My Office → Clinical Quality Measures → Create New Batch
- verify inclusion logic.

Charges/Claims

Core Bug #133562 – FQHC 59 modifier performance & logic
Prereq:

- Add Coverage Plan ID to FQHC59ModifierPlans recode.

Test Steps:

- Create services → My Office → Charges/Claims → Electronic Claims
- verify 59 modifier in 837 appears when coverage plan doesn't match recode and performance is acceptable.

Core Bug #133545 – Telehealth modifier prints on UB-04 paper replacement claims
Prereq:

- Client with UB-04 claim format; billed charge exists.

Test Steps:

- Override → To be replaced → Claim details → PCN;
- then Paper claims → Process now → Create claim file;
- verify telehealth modifier on UB-04 output.

Core Bug #133616 – Facility NPI format fields preserved; new 2310C NM1-09 Service Facility NPI
Prereq:

- 837P format
- configure rules under Claim Format Configuration Details.

Test Steps:

- Generate E-claim file
- validate NM1*77 segment contains NM1-08/-09 values as configured and NPI field uses full 10 characters
- confirm renamed Tax ID field.

ClaimLine

Core Bug #133491 – Status consistency after closing Action popup with (X) and saving
Test Steps:

- From Claim Line Details, open Action popup (Adjudicate/Pay/etc.), close with X, save
- verify Claim Line Status and History Status match.

Client Flags

Core Bug #133648 – 'Level' disabled when permission denied for new clients
Test Steps:

- Client Flags → New → Client Flag Details
- with denied permission
- confirm Level field is disabled.

Client Information

Core Bug #133543 – Associate Client ID in Contacts without error
Test Steps:

- Client Information (C) → Contacts → Associated Client ID
- map a client
- ensure no error.

Core Bug #133384 – Remove non-printable characters during dataset merge; no red errors
Test Steps:

- Add non-printable chars in Address across listed screens (Client Info, Contacts, Registration, Admin, Treatment Team)
- confirm merge validations succeed with no red errors.

Client Orders (and related UI behavior)

Core Bug #133439 – Interaction popups wrap text, add scrollbar, fit screen
Test Steps:

- Create medication order with interactions
- open Severity Description and Interacting Medication Details popups
- verify rendering/scroll.

Core Bug #133455 – Saving order as preference doesn't change dispense quantity
Test Steps:

- Save medication order as Preference and insert
- confirm quantity unchanged.

Core Bug #133571 – Config key updated: ShowAlertForDuplicateMedicationOrdersInRxAndClientOrders = 'Rx and Client Orders' (warning shown)
Test Steps:

- Create duplicate orders in Rx and Client Orders
- confirm warning appears in both screens.

Core Bug #133541 – No XML parsing error when special characters in Question Answer
Test Steps:

- Create Client Order with special chars in Answer
- verify no parsing error.

Core Bug #133481 – Diagnosis dropdown orders primary first; rest ascending
Test Steps:

- With multiple diagnoses (DSM-5/ICD-10)
- confirm order in Select from existing diagnosis.

Core Bug #133569 – Tooltip shows full order name/description in selection popup
Test Steps:

- Hover in Client Order Selection
- verify full tooltip text.

Core Bug #133461 – Dispense time handling & MAR synchronization across Client Orders/MAR/Rx
Test Steps:

- Override dispense times via Clock in Client Orders; sign; confirm MAR shows overridden time without duplicates.
- Modify dispense time via Clock in Client MAR; verify persistence and reflection back in Client Orders.
- Create overlapping orders with different dispense times; confirm warning and no duplicate MAR.
- Complete orders (bulk or detail); verify MAR records completed and no new MAR created.
- Confirm Use Default button removed in Clock popups.
- Validate titration/multi-step order MAR generation honors Use Start Time and does not pre-create entries.
- For Rx Medication, confirm order appears in Client MAR; modifying dispense time applies without duplicates.
- Confirm data model updates: OrderTemplateFrequencyOverrides.IsUserOverride; MedAdminRecords.HasAuditIssue/AuditSeverity/LastAuditDate; new MedAdminAuditLog.

~~Core Assessment~~

~~Core Bug #133702 – 'Age of First Use' can be modified after save/sign; persists~~
~~Prereq:~~

- ~~Configure Core Assessment to show Substance Use tab.~~

~~Test Steps:~~

- ~~Save/sign then modify the field~~
- ~~confirm value retains.~~

Disclosure/Request

Core Bug #133649 – Disclosed items PDF orders attachments by ascending date
Prereq:

- Signed documents across date ranges.

Test Steps:

- Prepare disclosure; attach items randomly
- View/Print
- confirm ordering.

Documents

Core Bug #133482 – PHQ-9: last question validation only when any of Q1–Q9 ≠ 0
Test Steps:

- If all nine are 0, ensure no validation on Q10;
- otherwise validate.

Core Bug #133567 – Suicide Risk Assessment no longer triggers unsaved changes on repeated save
Test Steps:

- Save once
- confirm no residual unsaved state.

Core Bug #133312 – Safety/Crisis Plan (C) supports DFA tab; save/sign without red error
Test Steps:

- Add DFA via Screens (Admin)
- open document
- save/sign
- confirm success

Core Bug #133414 – Diagnosis Document shows specific ICD-10 validation messages (excluded/additional)
Prereq:

- REQUIREDIAGNOSISCONDITIONVALIDATION = 'Y'

Test Steps:

- Trigger excluded/additional code requirements
- verify specific codes listed in messages.

Dynamic Forms

Core Bug #133521 – DFA Editor: no duplicate rows from stored procedure inserts in Form Section Groups
Test Steps:

- Insert via stored proc
- confirm no duplication.

External Email

Core Bug #133484 – External Staff show in 'External Email' popup when correctly configured
Prereq:

- External staff email set
- Can't login
- permission item granted.

Test Steps:

- From signed document,
- open External Email
- verify staff appears in dropdown.

Flow Sheet

Core Bug #133519 – Non-staff entries appear in Flow Sheet list
Test Steps:

- Log in as Non-staff
- create/modify entry
- verify visibility.

~~Foster Care~~

~~Core Bug #133487 – Client Header shows name as Last, Suffix, First on FC Client Summary~~
~~Test Steps:~~

- ~~Add suffix~~
- ~~open FC Client Summary~~
- ~~verify format~~.

Group Services

Core Bug #133492 – 'Set All/Set Some' applies Custom Fields values to remaining clients
Test Steps:

- Create Group Service
- on Custom Fields tab set values
- use Set All/Some
- confirm propagation.

Messages Interface (HL7)

Core Bug #133488 – ADT NK1 extra line space removed; messages process to Finalized
Test Steps:

- Create NK1 with address
- process in Messages Interface
- confirm move from Ready to Finalized.

~~Methadone / MAT~~

~~Core Bug #133388 – Reverting Take Home sets Face-to-Face back to 'In Progress'; Take Home status stays 'Scheduled'~~
~~Prereq:~~

- ~~Signed Take Home order.~~

~~Test Steps:~~

- ~~Revert TH~~
- ~~verify statuses on MAT Management list.~~

~~Core Bug #133537 – Bottle Transaction Summary shows separate rows per day; sorted order~~
~~Prereq:~~

- ~~Same bottle transactions across multiple dates.~~

~~**Test Steps:**~~

- ~~Generate report~~
- ~~confirm sort: Location↑, Med Type↑, Med↑, Bottle/Box↑, Date↓~~

~~Core Bug #133424 – After browser refresh, disconnect Machine/Inventory works; X removed from connect/disconnect popup~~
~~**Test Steps:**~~

- ~~Connect, refresh, disconnect~~
- ~~verify popup behavior.~~

~~Core Bug #133570 – Printed label shows connected Clinic Location phone during Take Home dispense~~
~~**Test Steps:**~~

- ~~Dispense Take Home~~
- ~~confirm phone appears.~~

~~Core Bug #133478 – Validation to return pre-pours before modifying/ending overlapping orders~~
~~**Test Steps:**~~

- ~~With pre-pours, create overlapping order/modification~~
- ~~confirm validation message.~~

~~Core Bug #133503 – Report 'Run On' time format changed (hh:mm); Date Received shows date only for 'Received'~~
~~**Test Steps:**~~

- ~~Run listed MAT reports~~
- ~~confirm format changes.~~

~~Core Bug #133667 – PDF export formatting fixed for Spilled Medication by Date & Pre-Pour Transactions~~
~~**Test Steps:**~~

- ~~Export both reports to PDF~~
- ~~confirm header/sub-header formatting only on first page~~
- ~~no issues.~~

My Reports

Core Bug #133431 – 'Client Program Enrollment Without Active Coverage' maps DOS/Service ID/Procedure; blank row between records
Test Steps:

- Run report
- verify mapping & blank row separation.

Core Bug #133559 – ER File Detail runs even with Service Program >100 chars
Prereq:

- Process 835 (ERfileID) with long program name.

Test Steps:

- Open report
- enter ERfileID
- view without errors.

Core Bug #133515 – ER Claim Line Errors opens without rsProcessingAborted
Test Steps:

- Generate claims & ER
- run report
- ensure no dataset error.

Nightly Billing Job

Core Bug #132166 – ServiceCleanup moved post-processing; no interference with completion workflow
Test Steps:

- Complete services during nightly job window
- confirm workflow unaffected. (No screen path required.)

Patient Portal / Intelichart

Core Bug #133494 – Client signature renders correctly in PDFs signed via Patient Portal (correct ImageServer write)
Test Steps:

- Sign via Patient Portal
- open Document PDF
- verify signature displays.

~~Core Bug #133587 – Address updates reflect in SmartCare and Intelichart after approval~~
~~**Test Steps:**~~

- ~~Update address in Patient Portal~~
- ~~approve in Intelichart~~
- ~~verify both systems show updated address.~~

~~Core Bug #133661 – Text areas (Comments) show full text in Intelichart docs, not just first character~~
~~**Test Steps:**~~

- ~~Sign document with Comments~~
- ~~verify full text in Intelichart.~~

Quick Orders

Core Bug #133534 – '&' in comments no longer truncates in Quick Order PDF
Test Steps:

- Create Quick Order with '&' in comments

- sign
- confirm PDF shows full comment.

Reception (Front Desk)

Core Bug #133675 – Export from Front Desk list includes Phone Number
Test Steps:

- My Office → Front Desk
- export
- verify Phone column in file.

Resource Calendar

Core Bug #133510 – Zoomed out calendar aligns labels/blocks; no horizontal overflow
Test Steps:

- Create resource event
- zoom out
- verify alignment & no overflow.

RWQM

Core Bug #133577 – 'All Purposes' filter removed; linkage to Financial Assignments removed
Test Steps:

- Open RWQM Work Queue
- confirm filter/link removal.

Rx Application

Core Bug #133637 – Real-Time Med History generates on first button click (consents & service required)
Prereq:

- Service exists
- Med History Consent signed.

Test Steps:

- Rx → Patient Summary → Medication History → Real-Time Med History
- verify generation.

Services

Core Bug #133505 – Time In/Out not defaulting to 12:00 AM when created from Inquiry Details
Test Steps:

- From Client Inquiries → Inquiry Details (Crisis) create Service Note
- change status
- edit Start/End

- verify times no longer default to midnight.

Tracking Widget

Core Bug #133618 – Guardian didn't cosign flag hyperlink navigates to Client Flag Details even with special chars
Test Steps:

- From Dashboard → Tracking Widget, open flagged item
- confirm hyperlink navigation works.

UDS Reports

Core Bug #133483 – Section K: Meets Numerator 20a = 1 when Template/Order name match, LabOrder=Yes, LOINC matches OID for HIV 1/2 and MU set
Prereq:

- Client orders & Health Data Template with LabOrder=Yes and matching LOINC/OID.

Test Steps:

- Run UDS Table 6B – Section K
- verify Meets Numerator 20a value.

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	November 2025 MSP