SmartCare™ October 2025 MSP Release Notes (Changes) – Part 1

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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_1.39.000.2510.009 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 - 'ACTIVE CHANGE' (2)

Note: An *active change* is a product update that is automatically applied with the build and does not require any setup or action from the customer to take effect.

Sl. No	Task No	Summary	Module Name
1	EII # 132276	Changes are implemented for the 'CDAG Program' Dropdown Without Discharge Date for Appeals and Grievances Details Screen.	Appeals and Grievances
~~31~~	~~EII # 130726~~	~~The 'Self-preservation Status' field is converted from checkbox to dropdown field in the 'Residential Self - Preservation Assessment' document.~~	~~Documents~~

TASKS LIST- 'PASSIVE CHANGE' (35)

Note: A *passive change* is a product update that is applied with the build but requires the customer to complete configuration or other setup steps before the new functionality can be used.

Sl. No	Task No	Summary	Module Name
2	EII # 131000	Changes have been implemented on the Service Request List Pages.	Authorizations
3	EII # 132185	A new Care Coordination tool has been integrated into the 'Inquiry Details screen.	Care Co-ordination
4	EII # 132263	Care Coordination - Need to link to Client Contact Note Details Screen - Unhide icon	Care Co-ordination
5	EII # 132213	Implemented a new Care Coordination icon in the 'Documents', 'service note', and Details screens	Care Co-ordination
6	EII # 132331	Implemented a new Care Coordination icon to link to the 'Crisis Call Log Details' screen.	Care Co-ordination
7	EII # 132400	To Add a new Plan Rule to the system: " Send 0Fill Segment and suppress line adjudication information when transferred from these Plans."	Charges/Claims
8	EII # 129625	Implementation of the new System configuration key. 'SetBilledReallocatedChargeToRebill'	Charges/Claims
9	EII # 130591	Ability to export Charges/Claims data in the correct data formats and support large number of records.	Charges/Claims
10	EII # 127225	Changes are implemented to display Due Date in the Flags Pop-up	Client Flags

11	EII # 132267	To enhance the tracking protocol logic to prevent regeneration of completed flags when non-functional updates are made to Program Enrollment records.	Client Flags
12	EII # 131813	Added a new field of "Tribal Affiliation" to the Client Information screen.	Client Information
13	EII # 131860	Added new Order Status value called 'Pending Specimen Collection' in Client Orders List page, Client Orders Details page and Orders List page.	Client Orders
14	EII # 132126	Implementation of the Payment instruction and printed on the same page without page breaks on statement PDF.	Client Statement
15	EII # 132507	To Display Client's Chosen Name based on the value set in DisplayClientChosenName Configuration Key.	Client's Choosen Name
16	EII # 132595	Display the client's chosen name in place of the legal name on the Team Scheduling screen in SmartCare.	Client's Choosen Name
17	EII # 132596	To display Client's Chosen Name on Client Name header based on the value set in DisplayClientChosenName Configuration Key	Client's Choosen Name
~~18~~	~~EII # 131856~~	~~Core Assessment: ASAM Summary Button does not initialize the ASAM Final Determination Tab~~	~~Core Assessment~~
19	EII # 128040	Fixing a security issue with document authorship/security role incongruency	DFA (Dynamic Form Architecture)
20	EII # 132296	Implementation of the 'Problem List' dropdown option in the 'DFA architecture'.	DFA (Dynamic Form Architecture)
21	EII # 131985	Changes are Implemented to incorporate the 'Problem List' common control into Non-DFA + DFA Documents and Service Notes.	DFA (Dynamic Form Architecture)
22	EII # 130990	Changes are Implemented to Disposition Common Control into DFA Architecture.	DFA (Dynamic Form Architecture)
23	EII # 129944	Dictionary Setup - Review of Systems	Dictionaries
24	EII # 131955	Dictionary Setup – Procedures	Dictionaries
25	EII # 131958	Dictionary Setup - Organ Systems	Dictionaries
26	EII # 131959	Dictionary Setup - Reason for Appointment.	Dictionaries

27	EII # 131960	Dictionary Setup – N & S Review of Systems	Dictionaries
28	EII # 132099	Dictionary Setup - Dictionary List Page	Dictionaries
29	EII # 129945	Dictionary Setup - Physical Exam.	Dictionaries
30	EII # 132291	Changes are implemented to categorize documents using the 'Document Category' field and allow users to filter and view only the documents relevant to their team or program.	Document Codes
32	EII # 131030	CDAG Program Dropdown in 'My Documents' and 'Caseload Reassignment' screen.	Documents
33	EII # 131712	Changes are implemented in the 'USCDI Summary of Care' document to limit the data pull to include CDAG related data.	Documents
34	EII # 131720	Added New checkboxes for 'Modified Simple Screening Instrument for Substance Abuse (MSSI-SA)' Document.	Documents
35	EII # 132345	Core documents and Service Notes to display watermark option when in 'in progress' status.	Documents
36	EII # 132511	The Core Assessment document description format displaying incorrectly on the Documents List page	Documents List Page
37	EII # 131928	Alerts users when Ending Placement and LOC is not Ended	Foster Care

Functionality Task Details

Appeals and Grievances

Reference No	Task No	Description
1	EII # 132276	Changes are implemented for the 'CDAG Program' Dropdown Without Discharge Date for Appeals and Grievances Details Screen.

1. EII # 132276 (Feature # 585925): Changes are implemented for the 'CDAG Program' Dropdown Without Discharge Date for Appeals and Grievances Details Screen.

███ **ACTIVE CHANGE**

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

What's Changed:

The discharged programs are displayed in the 'Program' dropdown on both the 'Appeal Details' and 'Grievance Details' screens, regardless of the value set in the ClientAccessRuleDaysAfterProgramDischarge configuration key.

Screenshot to show Discharged Programs listing in Appeal and Grievance Details Page:

'Appeal Details' Screen:
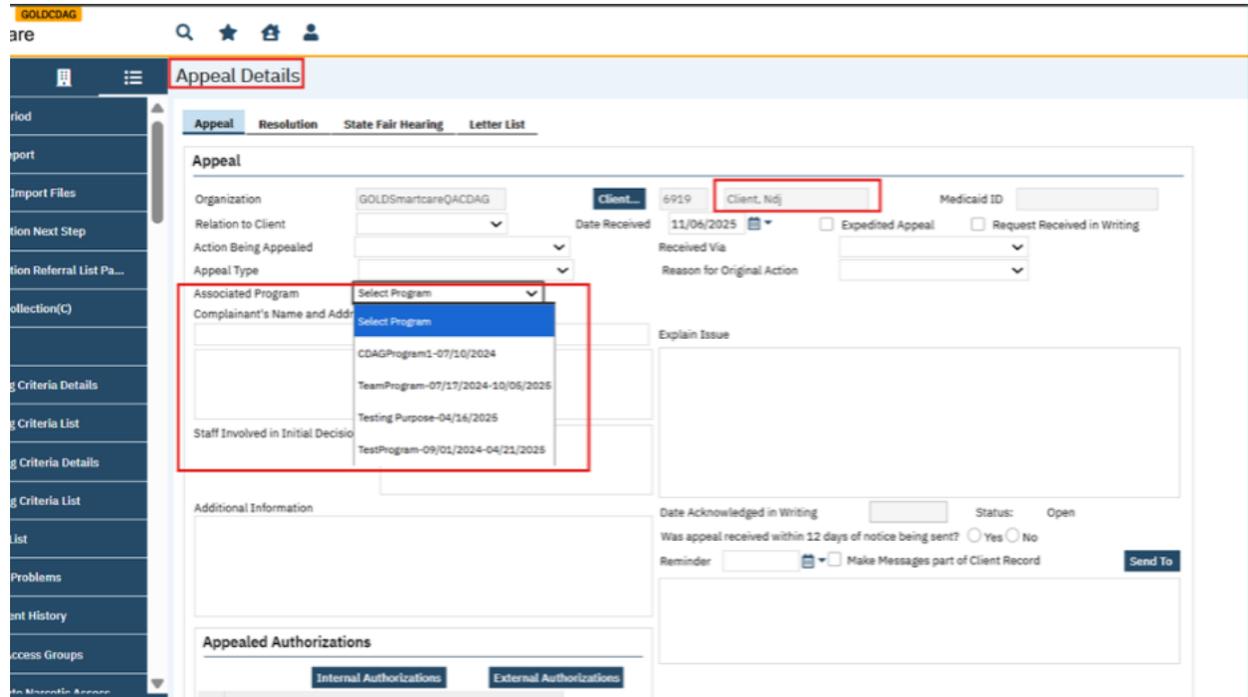
'Grievance Details' Screen:
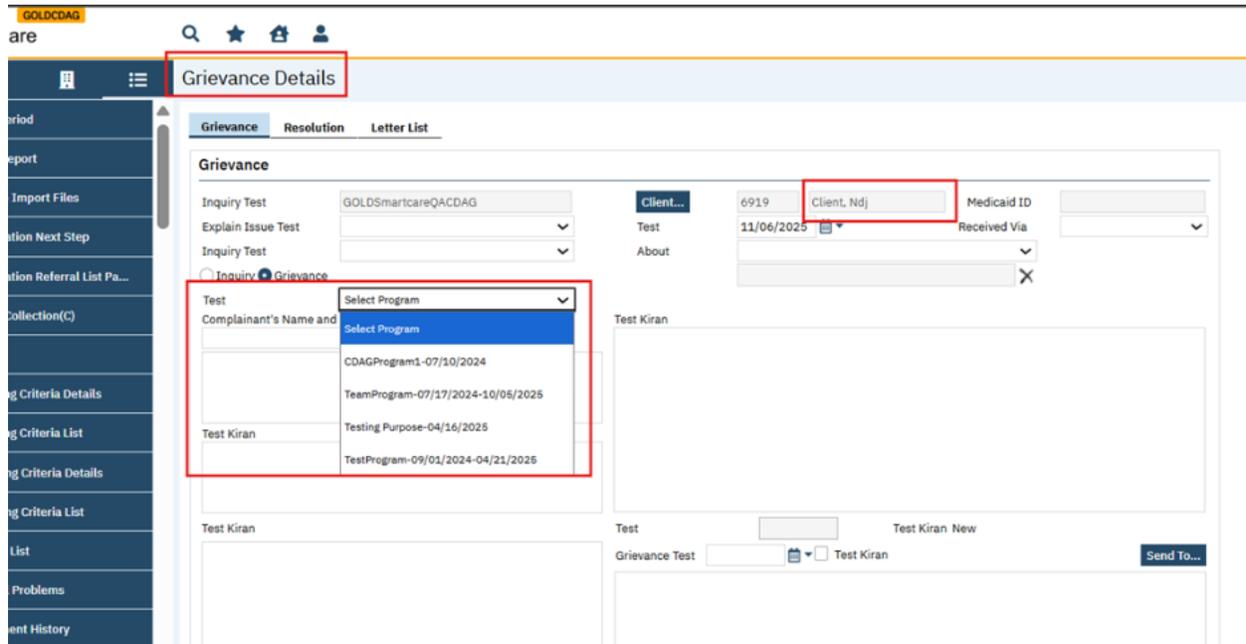
Prerequisites:

The system configuration key 'DisplayCDAGSectionInStaffDetails' value is set to 'Yes'.

The system configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Where to Find It:

Path 1: 'Client' Search - Select a client – Go Search – 'Appeals (My Office)' – Appeals list page – Appeal Details.

Path 2: 'Client' Search - Select a client – Go Search – 'Grievances (My Office)' – Grievances list page – Grievance Details.

How It Helps:

1. This enhancement ensures that all discharged programs remain visible for selection, irrespective of discharge days, improving data accuracy and user access consistency.
2. This change also removes dependency on the 'ClientAccessRuleDaysAfterProgramDischarge' configuration key value.

Authorizations

Reference No	Task No	Description
2	EII # 131000	Changes have been implemented on the Service Request List Pages.

2. EII # 131000 (Feature # 545355): Changes have been implemented on the Service Request List Pages.

Note 1: This is Passive Change.

Note 2: This functionality is implemented for a specific customer. If you have Primary and County types of setup and would like to use these functionalities, please get in touch with Streamline Support.

What's Changed:

A new '**All**' checkbox has been added next to Assigned Staff text box, and the Assigned Workgroup dropdown has been updated to a multi-select dropdown. These enhancements have been applied across all Service Request List pages as follows:

- Service Request-Review/Approval List (Client)
- My Service Request-Review/Approval List (My Office)
- Service Request List (Client)
- My Service Request List (My Office)

Service Request-Review/Approval List (Client)
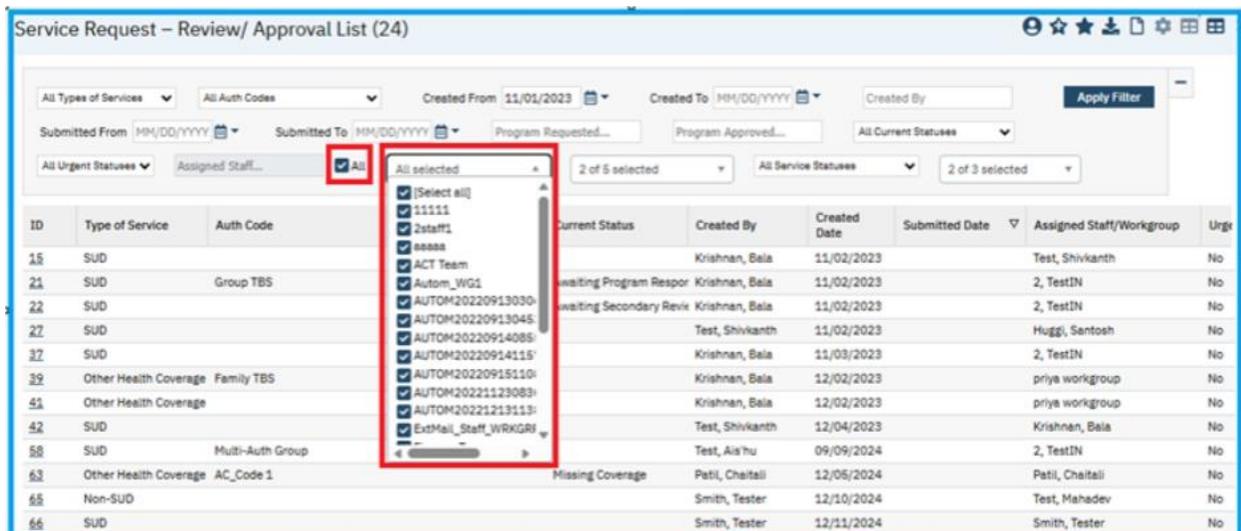
"All" checkbox is implemented in the same way for My Service Request-Review/Approval List (My Office), Service Request List (Client) and My Service Request List (My Office).

The logic for Assigned Staff and Assigned Workgroup filters of the list pages Service Request-Review/Approval List (Client) and My Service Request-Review/Approval List (My Office):

1. When the **"All"** checkbox is selected for Assigned Staff and all Assigned Workgroups are chosen, the system will display all records assigned to the logged-in staff, all records assigned to any of their supervisees, and all records assigned to the workgroup/s associated with the logged-in staff or their supervisees within the CDAG.

2. When the **"All"** checkbox is selected for Assigned Staff and one Assigned Workgroup is chosen, the system will display all records assigned to the logged-in staff, all records assigned to any of their supervisees, and all records assigned to a specific workgroup associated with the logged-in staff or their supervisees within the CDAG.

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3. When the **"All"** checkbox is selected for *Assigned Staff* and *Assigned Workgroups* are not selected, the system will display all records assigned to the logged-in staff and all records assigned to any of their supervisees.

4**.** When one assigned staff is selected for *Assigned Staff* and All *Assigned Workgroups are* chosen, the system will display all records assigned to the selected staff and all records assigned to any workgroup associated with the logged-in staff or their supervisees within the CDAG.

5**.** When one assigned staff is selected for *Assigned Staff* and one *Assigned Workgroups* are chosen, the system will display all records assigned to the selected staff and all records assigned to a specific workgroup associated with the logged-in staff or their supervisees within the CDAG.

6. When one assigned staff is selected for *Assigned Staff* and *Assigned Workgroups* are not selected, the system will display all records assigned to the selected staff.

7. When Assigned Staff is not selected and all Assigned Workgroups are chosen, all records assigned to any workgroup associated with the logged-in staff or their supervisees within the CDAG.

8. When Assigned Staff is not selected for Assigned Staff and one Assigned Workgroup is chosen, the system will display all records assigned to a specific workgroup associated with the logged-in staff or their supervisees within the CDAG.

9. When the Assigned Staff is not selected and Assigned Workgroup is not selected, the following validation message will be displayed
Validation Message: "Please select at least one staff member or workgroup".

The logic for Assigned Staff and Assigned Workgroup filters of the list pages Service Request List (Client) and My Service Request List (My Office):

1. When the **"All"** checkbox is selected for Assigned Staff and all Assigned Workgroups are chosen, it will display all records assigned to any staff and all records assigned to any workgroup.

2**.** When the **"All"** checkbox is selected for Assigned Staff and one Assigned Workgroups are chosen, it will display all records assigned to any staff and all records assigned to specific workgroup.

3. When the **"All"** checkbox is selected for Assigned Staff and Assigned Workgroups are not selected, the system will display all records assigned to the any staff.

4**.** When one assigned staff is selected for Assigned Staff and All Assigned Workgroups are chosen, the system will display all records assigned to the selected staff and all records assigned to any workgroup.

5**.** When one assigned staff is selected for Assigned Staff and one Assigned Workgroups are chosen, the system will display all records assigned to the selected staff and all records assigned to a specific workgroup.

6. When one assigned staff is selected for Assigned Staff and Assigned Workgroups are not selected, the system will display all records assigned to the selected staff.

7. When Assigned Staff is not selected and all Assigned Workgroups are chosen, the system will display all records assigned to any workgroup.

8. When Assigned Staff is not selected for Assigned Staff and one Assigned Workgroup is chosen, it will display all records assigned to a specific workgroup.

9. When the Assigned Staff is not selected and Assigned Workgroup is not selected, then the below validation message will be displayed.
 validation Message: "Please select at least one staff member or workgroup".

Prerequisites: CDAG is set up as below:
1. System configuration key "DisplayCDAGSectionInStaffDetails" value is set to 'Yes'.

2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Where to Find It:

Path 1: Client- Search 'Service Request-Review/Approval List (Client)' screen.

Path 2: Go search - Search 'My Service Request-Review/Approval List (My Office)' screen.

Path 3: Client - Search 'Service Request List (Client)' screen.

Path 4: Go Search-Search 'My Service Request List (My Office)' screen.

How It Helps:
To ensure that the correct records are listed in Service Request and Service Request Review/Approval list pages based on the staff and/or workgroup selected in the filter.

Care Co-ordination

Reference No	Task No	Description
3	EII # 132185	A new Care Coordination tool has been integrated into the 'Inquiry Details screen.
4	EII #132263	Care Coordination - Need to link to Client Contact Note Details Screen - Unhide icon
5	EII # 132213	Implemented a new Care Coordination icon in the 'Documents', 'service note', and Details screens
6	EII # 132331	Implemented a new Care Coordination icon to link to the 'Crisis Call Log Details' screen.

3. EII # 132185 (Feature # 578789): A new Care Coordination tool has been integrated into the 'Inquiry Details screen.

Note: This is a passive change. On the Inquiry Details screen, a new **Care Coordination** tool will now be visible to users based on their administrative access permissions.

What's Changed:

The new '**Care Coordination'** tool is displayed on the '**Inquiry Details'** screen. The icon's state (enabled or disabled) is determined based on the '**ButtonCareCoordination'** permissions set by the administrator for the user's role or staff access.

- For non admin staff, the icon permission is denied by default. Icon gets enabled, only when the permission for the icon is granted.
- For admin staff, this icon will display regardless of the permission.

Care Coordination icon is displayed on the 'Inquiry Details' screen:
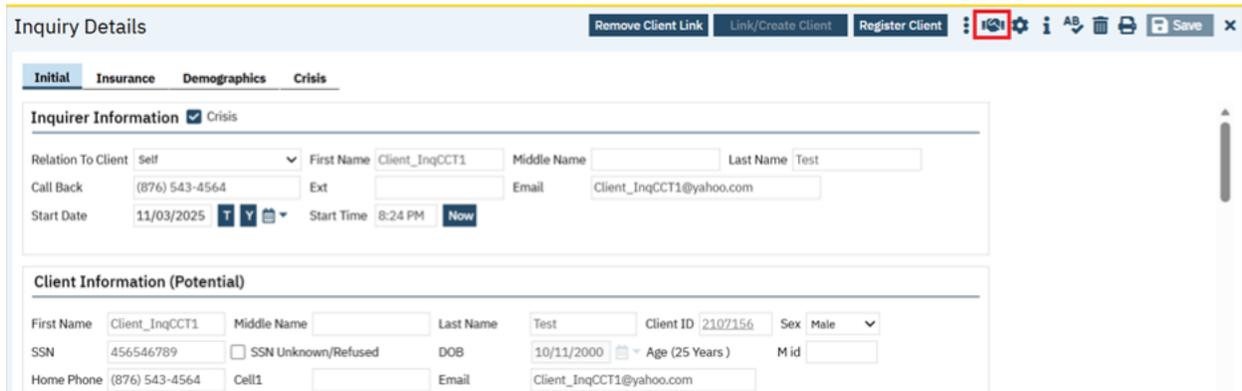
On click of Care Coordination icon, it opens the Care Coordination popup details
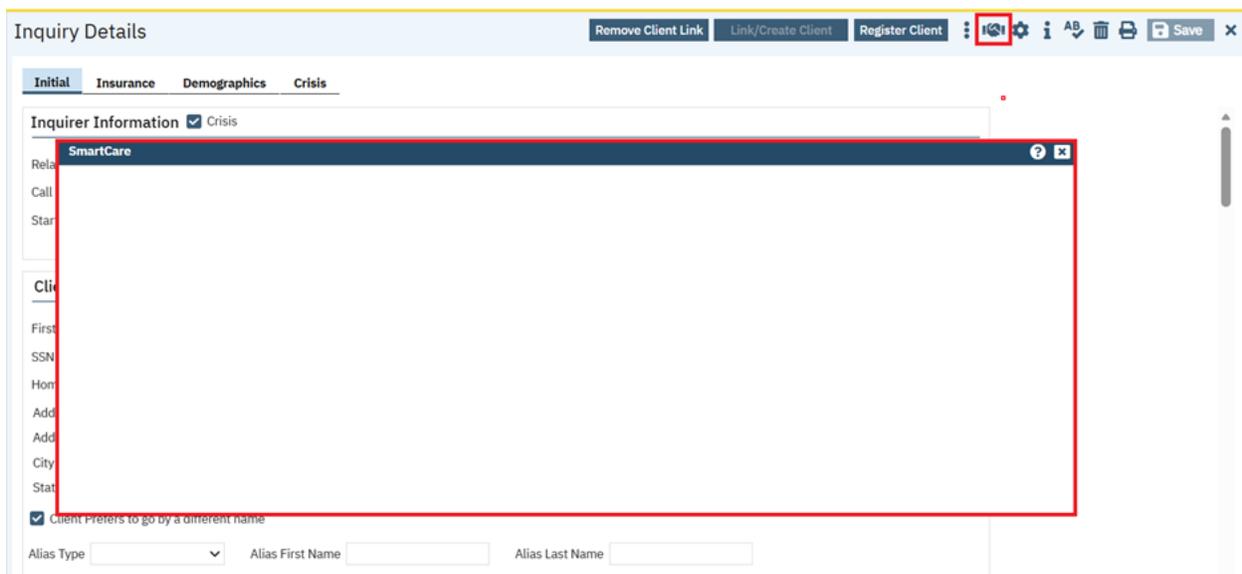
Path 1: Administrator - Role Definition - Default Permissions for Selected Role section – 'Permission Type' dropdown – select Screens (new mode)/ Screens (Update mode) - select the parent as Inquiry Details – Permission item as 'ButtonCareCoordination' and click 'Apply filter' button.

Path 2: Administrator – Staff/User - Staff Details screen - Role Permission tab - Default Permissions for Selected Role section – 'Permission Type' dropdown – select Screens (new mode)/ Screens (Update mode) - select the parent as Inquiry Details – Permission item as 'ButtonCareCoordination' and click 'Apply filter' button.

Path 3: 'Client search popup' – 'Inquiry (New Client)' button - 'Inquiry Details' screen – Tool bar – 'Care Coordination' icon.

How It Helps:

The Care Coordination tool is for CCBHC customers. Clicking on the tool opens a pop-up displaying Care Coordination details and allows users to navigate to, create, or link Care Coordination records from the Inquiry Details screen.

4. EII # 132263 (Feature # 585725): Care Coordination - Need to link to Client Contact Note Details Screen - Unhide icon.

Note: This is a passive change. A new Care Coordination icon will now be visible in the tool bar for Client Contact Details screen.

What's Changed:

The new 'Care Coordination' Tool is displayed on Client Contact Details' screen. This will be displayed based on the administrator's access permission given for the user.

On click on 'Care Coordination' Tool, the Care Coordination implemented for a Detail Page pop up is displayed.

Care Coordination icon is displayed in Contact Note Detail screen:
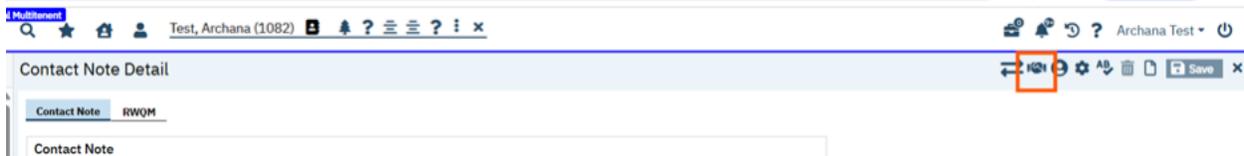
On click of Care Coordination icon Care Coordination implemented for a Detail Page pop up screen:
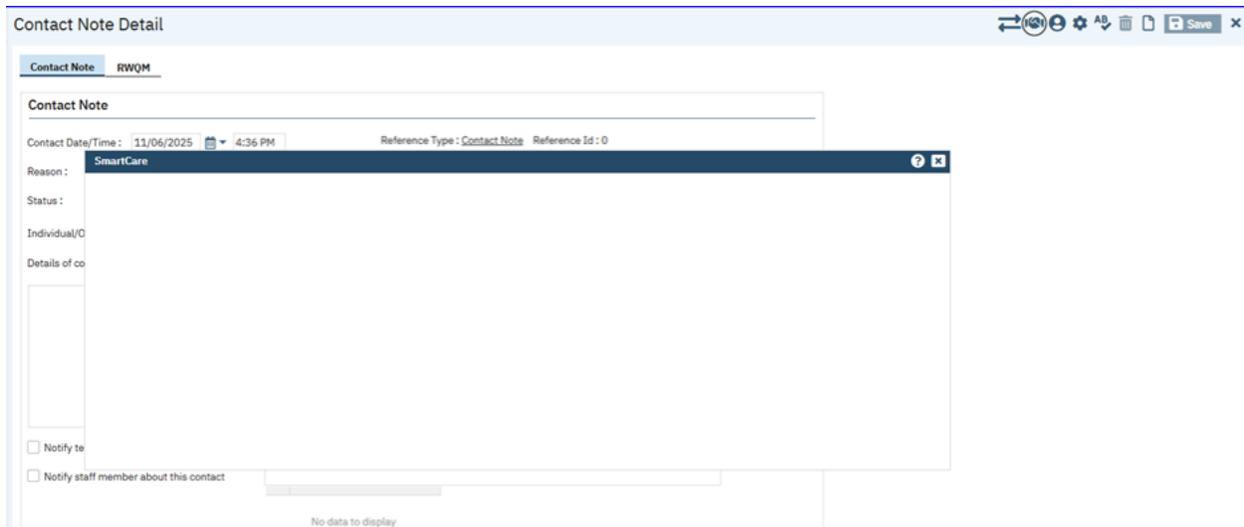
Where to Find It:

Path 1: Client 'menu' -- Search 'Contact Note (Client) –Click on new icon – 'Contact Note Detail' screen.

How it Helps:

The tool is added and will be enabled for CCBHC customers to open the pop up listing the Care Coordination details allowing them to navigate/create to the Care Co-ordinations details from the details screen and to link/navigate/create the Care Co-ordinations details from the Contact Note Detail screen.

5. EII # 132213 (Feature # 581089): Implemented a new Care Coordination icon in the 'Documents', 'service note', and Details screens.

Note: This is a passive change. A new Care Coordination icon will now be visible in the tool bar for documents, Service Note, and Details pages.

What's Changed:

The system displays the new 'Care Coordination' icon in the following screens toolbar areas:-

'Documents' and 'Service Notes' screens:

1. The system displays the new 'Care Coordination' icon by default but keeps it disabled for all the Documents and 'service note' screens.
2. The system enables the disabled icon only for users with granted permission.
3. When a user clicks the enabled icon, the system displays the Care Coordination link pop-up.

Documents:
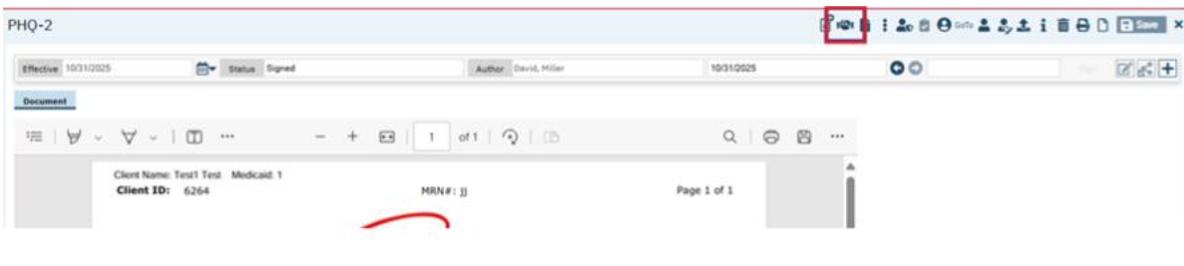
On click of Care Coordination icon, the system displays Care Coordination link pop up.

Service Note:
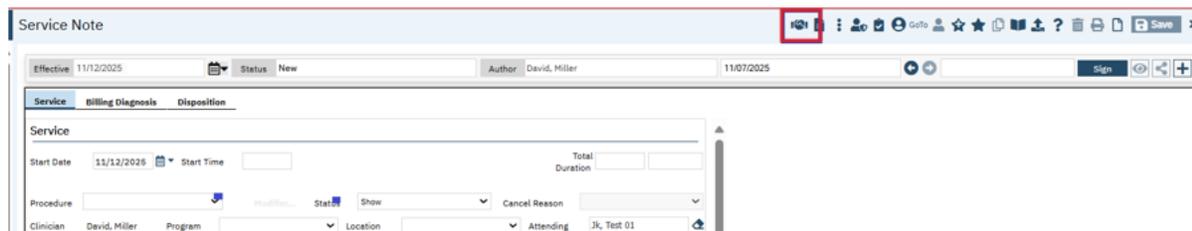
On click of Care Coordination icon, the system displays Care Coordination link pop up.

Details Pages:

- Added the new 'Care Coordination' icon to all the details pages.
- The system will hide the icon on all detail pages, and the module team will display it based on their requirements.
- The system will disable the permission for this icon by default. Staff can enable these icons only when they are granted permission.

Where to Find It:

Path 1: Client -- Documents -- Open any document.

Path 2: Client -- 'Service Note' .

Path 3: Client -- Any detail page

Path 4: Administration -- Any detail page.

How It Helps:

The Care Coordination tool is for CCBHC customers to open a pop-up listing Care Coordination detail. From this pop-up, users can navigate to, create, or link Care Coordination details from the Documents and Service Note.

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6. EII # 132331 (Feature # 588191): Implemented a new Care Coordination icon to link to the 'Crisis Call Log Details' screen.

Note: This is a passive change.

What's Changed:

The system displays the new 'Care Coordination' icon in the following screen toolbar areas

'Crisis Call Log Details' screen:

- The system displays the new 'Care Coordination' icon by default but keeps it disabled for 'Crisis Call Log Details' screen.
- The system enables the disabled icon only for users with granted permission.
- When a user clicks the enabled 'Care Coordination' icon, the system displays the Care Coordination link pop-up.

'Crisis Call Log Details' screen:

On click of Care Coordination icon, the system displays Care Coordination link pop up.

Where to Find It:

Path: My Office -- 'Crisis Call Log' -- Click on New icon – 'Crisis Call Log Details' screen**.**

How It Helps:

The Care Coordination tool is for CCBHC customers to open a pop-up listing Care Coordination detail. From this pop-up, users can navigate to, create, or link Care Coordination details from the 'Crisis Call Log Details' screen.

Charges/Claims

Reference No	Task No	Description
7	EII # 132400	To Add a new Plan Rule to the system: " Send 0Fill Segment and suppress line adjudication information when transferred from these Plans."
8	EII # 129625	Implementation of the new System configuration key. 'SetBilledReallocatedChargeToRebill'
9	EII # 130591	Ability to export Charges/Claims data in the correct data formats and support large number of records.

7. EII # 132400 (Feature # 591961): To Add a new Plan Rule to the system: " Send 0Fill Segment and suppress line adjudication information when transferred from these Plans."

Note: This is a passive change.

What's Changed:

A new Plan Rule: "Send 0Fill Segment and suppress line adjudication information when transferred from these Plans" has been added.

This new rule will send the AMT*A8 information on secondary plans and suppress the loop 2320 AMT*D segment and 2430 SVD, CAS, and DTP segments for procedures transferred from specified plans. See the Segments 0Fill Suppression Rule tab for specific loop and segment information.
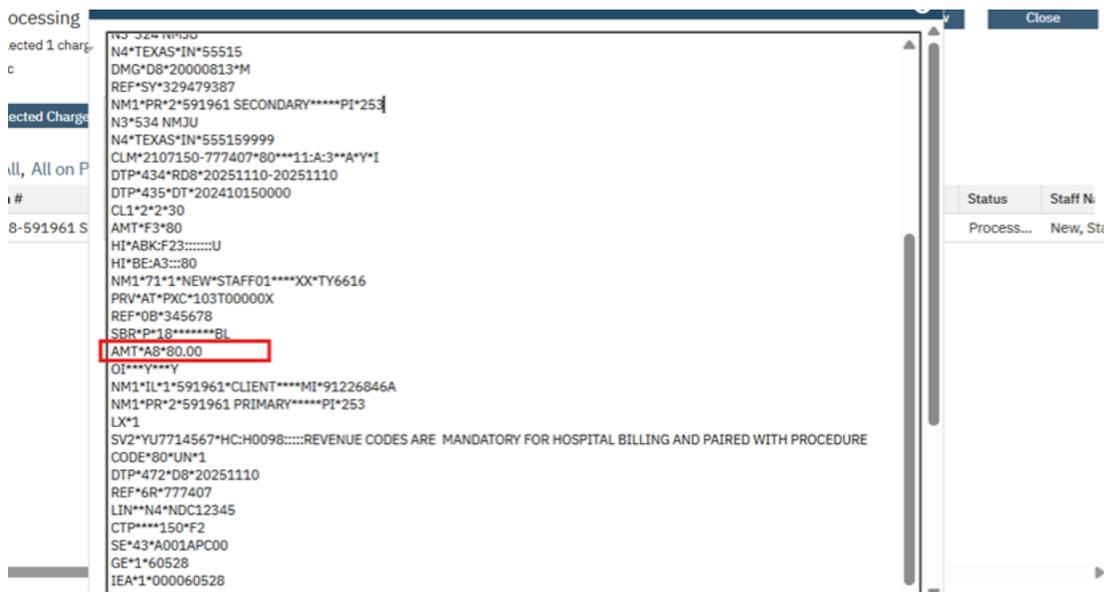
Here,

- **AMT*A8*80.00** is the segment in loop 2320, where A8 is the qualifier and $80.00 is the Non-Covered Charges Amount (The Total charge amount from the primary non-billable coverages).
- The AMT*D segment in loop 2320 will not be sent.

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- The SVD, CAS and DTP segments in loop 2430 loop will not be sent

Note: The segments for 0fill suppression rule will not work for the following scenarios:

- If the Charge Error global code value is not added in the Recode category 'SetErrorTypesToIdentifyNonBillableCodes' but added in other Recode categories 'CascadePayerChargeErrors' and 'CascadePayerChargeErrorsKeepPriority'.
- If we map coverage plan rule other than 0Fill in Medicaid.
- If user maps wrong Coverage Plan in secondary Medicaid plan Rule.

Prerequisites:

- A client has two coverages.
- Identify Primary Coverage – Medicare (primary insurance plan) and services that are not covered that need to drop to secondary payer.
- When a non-covered service charge is created for the primary insurance plan identified in step 1 above, that charge should cascade to the secondary Medicaid plan.

Where to Find It:

Path 1: 'Administration' – 'Plan' quick link – 'Plan Details' screen – 'General Information' section.

Path 2: Primary Plan 'This is a Medicare Plan' checkbox is checked -- 'Claim Information' section 'Standard Electronic Claim Format' drop down -- ''HIPAA 837 Institutional'(HIPAA 837 Institutional Dx Document or HIPAA 837 Institutional Service Dx).

Path 3: Secondary Plan 'This is a Medicaid Plan' checkbox is checked -- Claim Information' section 'Standard Electronic Claim Format' drop down -- ''HIPAA 837 Institutional'(HIPAA 837 Institutional Dx Document or HIPAA 837 Institutional Service Dx).

How it Helps:

An update to the 0Fill logic which would allow customers to Suppress the SVD, CAS AMT*D and DTP segments when processing and sending AMT*08 claim segments.

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8. EII # 129625 (Feature # 477213): Implementation of the new System configuration key 'SetBilledReallocatedChargeToRebill'.

Note: This is passive change.

What's Changed:

A new configuration key 'SetBilledReallocatedChargeToRebill' has been implemented. Using this key, the system will automatically set to rebill, and this will reduce the amount of manual intervention to process those claims.

Configuration Key Details:

SystemConfigKey: SetBilledReallocatedChargeToRebill

Read Key as: Set Billed Reallocated Charge To Rebill.

Allowed Values: Yes, No

Default Value: No

Modules: SCM Accounting, SCM Accounts Receivable, SCM Financial 1

Description: This is a change to an existing feature of our core product by introducing a system configuration key.

When a charge is billed and reallocated to a lower priority plan, the original billed charge remains in the Billed Status. If the charge transfers to the now higher priority plan again for billing, it will need to be manually set to Rebill.

A) If the key-value is set to "No," end users manually set the charge to Rebill. **This will be the default value of the key as it drives the existing system behavior.**

B) If the key-value is set to "Yes," the charge will automatically be set to Rebill when the reallocation takes place.

If by chance the value of the key is updated with any value apart from the allowed values, the system **will consider the default behavior, i.e. same as the key value being "No".**

Note: The new primary charge must be at a $0.00 balance for the secondary charge (previously the primary charge) to be set to Rebill.

Where to Find It:

Path 1: Administration' —'Plans' -Click on 'New' button—'Plan Details' Page will be opened—Enter all the required details—Select 'HIPAA 837 Professional' from the 'Standard Electronic Claim Format'—Click on 'Save' button.

Path 2: 'Coverage' -'Client' —Coverage screen will be opened—Click on 'New' button –Select required plans and click on 'Save' button –Two or more plans are added—Enter date fields and add COB order – Click on 'add' button.(Note the order of COB).

Path 3: 'Administration' —'Configuration keys' -Search
' ExcludePaidServicesFromReallocation' Configuration key—Enter the value as 'N'—Click on 'Save' button.

Path 4: Administration' —'Configuration keys'-Search
' SetBilledReallocatedChargeToRebill' Configuration key—Enter the value as 'Yes'—Click on 'Save' button.

Path 5: Client' —'Services'-Click on 'DOS' hyperlink—'Service Details' page will be opened—Click on 'Charge' hyperlink—'Ledger Entries' page will be opened. (Plan with COB order 1 is added)

Path 6: 'My Office' - 'Billing' -'Charges/Claims'- 'Charges/Claims' list page – Select the Charge Id and click on 'E-claim' button -'Process Now' button – Create claim file.

Path 7: 'Coverage' —'Client' - Coverage screen will be opened –Click on Change COB Order in the 'Plan Time Spans' section—Change COB order of the Plans—Click on 'Save' button.

8. Ensure that **Reallocation job** is executed.

9. Make sure that Reallocation has been done for the Plan in the Ledger entries.

Path 10: 'My Office'-'Payments/Adjustments' -Click on 'New EOB/Payments/Adjustments' button – Enter the amount –Select required 'Plan' in the Payer section- Click on 'Service Search' tab—Click on 'Service Id' check box—Click on 'Select' button—Enter the full charge amount --Click on 'add' button— Click on 'update' button'-'Smart care' popup will be opened.

11. Make sure that the secondary charge is billed.

12. Check the Charge details screen for the Rebill status and make sure that it is set to the Rebill.

Path 12: 'Client' -'Services'-Click on 'DOS' hyperlink—'Service Details' page will be opened—Click on 'Charge' hyperlink—'Ledger Entries' page will be opened. (Primary charge will be set as Rebill)

Path 13: Configuration keys (Administration)- search for the 'SetBilledReallocatedChargeToRebill'- Click on Apply filter- click on the key hyperlink- Verify the 'SetBilledReallocatedChargeToRebill; configuration Key Details.

How It Helps:

This improves, the volume of claims is far too much for them to do this manually which has continuous long term financial impact due to timely filing limitations and lack of staff to handle this.

9. EII # 130591 (Feature # 524172): Ability to export Charges/Claims data in the correct data formats and support large number of records.

Note: This is a Passive change.

What's Changed:

With this release, a new icon has been added to the tool bar section of the Charges/Claims screen. And the new configuration key 'SetFolderPathForChargesClaimsAsynchDownloadProcess' has been implemented.

1. A new ![icon] icon is added to the toolbar on the Charges/Claims list page, on clicking the icon it will list the two options:

- Initiate Download
- View Downloads

Hover-over on this ![icon] icon , it will display the tool tip message as "Asynchronous Export Process".

The 'Asynchronous Export Process' button is permission based, it will enable based on the permission at the screen (Update mode) and (New mode).
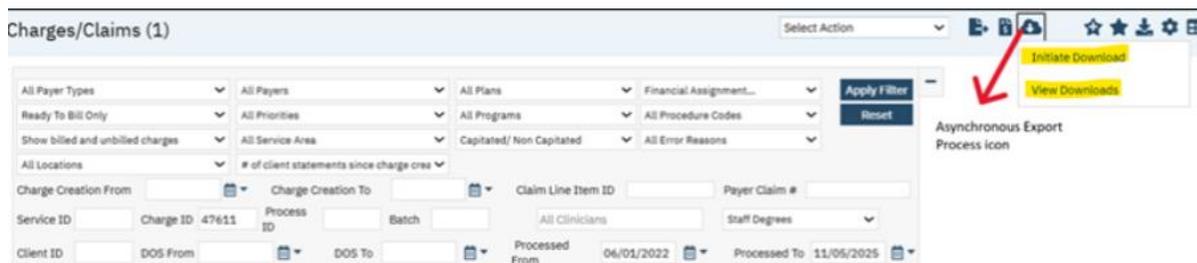
2. Initiate Download: Clicking on the Initiate Download, the system starts the export process in the background based on screen filters, and it will open the **Asynchronous Export Process pop-up** to track the export status.

The **Asynchronous Export Process** pop up window is displayed with the following fields:

 I. **Filter Section:** In the filter section the below fields will be displayed.

1. Downloaded From: This is a calendar control text box. When filtered with 'From Date' the records are fetched based on the files exported matches with the date.
a. Default Value = 7 Days in the past from Current Date. The defaulted dates will automatically display the records from the last seven days.
 b. The date will be displayed in the format of "MM/DD/YYYY"

2. Downloaded To: his is a calendar control text box. When filtered for 'To Date' the records are fetched based on the files exported matches with the date.
 a. Default Value = Current Date
 In combination with the default 'From Date' (7 days prior), this displays records from the last seven days by default.
 b. The date will be displayed in the format of "MM/DD/YYYY".

3. Apply Filter: On clicking this button, the records will be displayed based on the filter criteria mentioned and refresh the grid data.

4. Close: On click of the close button, the pop up gets closed and system returns to main screen.

II. Grid Section: In the grid section the below columns will be displayed.

1. Downloaded File Id: This column displays the exported file id which is unique for each exported file.
2.Downloaded On: This column displays the date on which the file is downloaded.

3.File Name: This column displays the name of the exported file.

4.Status: This column displays the status of the exported file.

If the file is in queue for downloading, then the column displays the status as "**Download in Progress**"
If the file is already downloaded, then it displays the status as "**Complete**".

5.Processed From: This column displays the value entered in the **Processed From** filter field on the Charges/Claims screen.

6.Processed To: This column displays the value entered in the **Processed To** filter field on the Charges/Claims screen.

7.DOS From: This column displays the value entered in the **DOS From** filter field on the Charges/Claims screen.

8.DOS To: This column displays the value entered in the **DOS To** filter field on the Charges/Claims screen.

9.All charges: This column displays the value entered in the **All Charges** filter field on the Charges/Claims screen.

10.Download: A hyperlink is provided by this column to allow users to download the specific exported file directly.

Note 1: If the folder path is not configured, the system will display the following confirmation message: **"Folder path to download the file is not configured. Please try the asynchronous download after configuring the folder path.**"

Note 2: When a background process is already running and if the user clicks on the **"Initiate Download"** button, the following validation message is displayed:
 "An asynchronous process is already in progress. Download cannot be initiated at this time."

3. View Downloads: Clicking on the View Downloads, the system will open the same. **Asynchronous Export Process pop-up** and lists previously exported files for viewing and downloading.

4. The '**SetFolderPathForChargesClaimsAsynchDownloadProcess** 'configuration key has been implemented for setting up the path to save the downloaded folder.

System configuration Key Details:

SystemConfigKey: SetFolderPathForChargesClaimsAsynchDownloadProcess

Read Key as: Set Folder Path on the server to place Asynchronous downloads from Charges and Claims screen in Excel.

Allowed Values: Valid Folder Path. Example:
\\nocvm.azure.smartcarenet.com\SFTP\OrgName\Users\documents\ChargesClaimsAsynchDownlod

Default Value: None

Module: SCM Financial 1

Screen: Charges/Claims

Description: This new feature is being added to the core product by introducing a system configuration key that enables customers to access files downloaded asynchronously from the Charges/Claims list page.

For Streamline hosted customers, Streamline will set up a common shared folder on the hosted server for each requesting customer and proper permissions will be configured to ensure secure access. Also, a custom script will be provided to set the configuration key value. This script will release the SFTP folder path that the customer can use to access the downloaded files.

Self-hosted customers can create a shared folder at a convenient location granting access to the required users. The system configuration key must be updated with this folder location to enable the access for the downloaded files.

A) If the key-value is set to "None", the folder path will not be available. **This will be the default value of the key as it drives the existing behavior.**

B) If the key-value is set to a "valid folder path", the system will store the asynchronously generated file from Charges/Claims list page to the specified folder path, making it available for download.

Note:
If by chance the value of the key is updated with any value apart from the allowed values, the system **will consider the default behavior, i.e. same as the key value being "None".**

Prerequisites:

1: Ensure that the Permission is granted for Asynchronous Export Process Button for 'Screen (New Mode)' and 'Screen (Update Mode)'.

Navigation Path: Go to the 'Administration' - 'Staff/Users'- staff/users list page- Click on the required staff name hyperlink- 'Roles/Permission' tab - Select 'Screen (New Mode)' – Filter for asynchronous button – Click on Grant button – Roles/Permission pop-up window is displayed – enter start and end dates – Click on Ok then save. Similarly grant permission for Screen (Update Mode).

2.Provide valid folder path value in the Configuration key named SetFolderPathForChargesClaimsAsynchDownloadProcess

Navigation Path: Administration'—'Configuration keys'-Search and click on 'SetFolderPathForChargesClaimsAsynchDownloadProcess' Configuration key—Configuration Key Details — Enter the valid folder path value —Click on 'Save' button.

Where to Find It:

Path 1: 'Go search' – 'Charges/Claims (My Office)'– Charges/Claims list page – Enter the required details – Click on Apply Filter - Click on the "Asynchronous Export Process" icon – Select Initiate Download option - Asynchronous Export Process pop up is opened.

Path 2: Go search' – 'Charges/Claims (My Office)'– Charges/Claims list page – Click on the "Asynchronous Export Process" icon – Select View Downloads option - Asynchronous Export Process pop up is opened – Enter the required details in the filter section – Click on Apply Filter – Click on download hyperlink to view the exported file.

Path 3: Administration'—'Configuration keys'-Search and click on 'SetFolderPathForChargesClaimsAsynchDownloadProcess' Configuration key—Configuration Key Details-Click on save.

How It Helps: The purpose of this change is to improve the export functionality on the Charges and Claims screen to handle large data exports efficiently. The new process moves exports to the background, allowing users to keep working while the file is prepared. This change reduces system load, prevents crashes, and provides a faster, smoother, and more user-friendly export experience.

Data Model Changes:

New table **AsynchronousExportChargeFileHistory** is created.

Client Flags

Reference No	Task No	Description
10	EII # 127225	Changes are implemented to display Due Date in the Flags Pop.
11	EII # 132267	To enhance the tracking protocol logic to prevent regeneration of completed flags when non-functional updates are made to Program Enrollment records.

10. EII # 127225 (Feature # 353297): Changes are implemented to display Due Date in the Flags Pop-up.

Note: This is a Passive change.

What's Changed:
SmartCare now improves flag functionality by providing easier visibility of the Due Date in the 'Flag Alert Popup'.

'Flag Alert Popup' Enhancement:

The following changes have been implemented to the 'Flag Alert Popup':

1. The existing column 'End Date' has been moved to the end of the 'Flag Alert Popup'.

a. A new column 'Due Date' has been added after the 'Start Date' column.

1. The 'Due Date' value is now fetched from the 'Client Flag Details' screen corresponding to each flag and displayed in the 'Flag Alert Popup'.
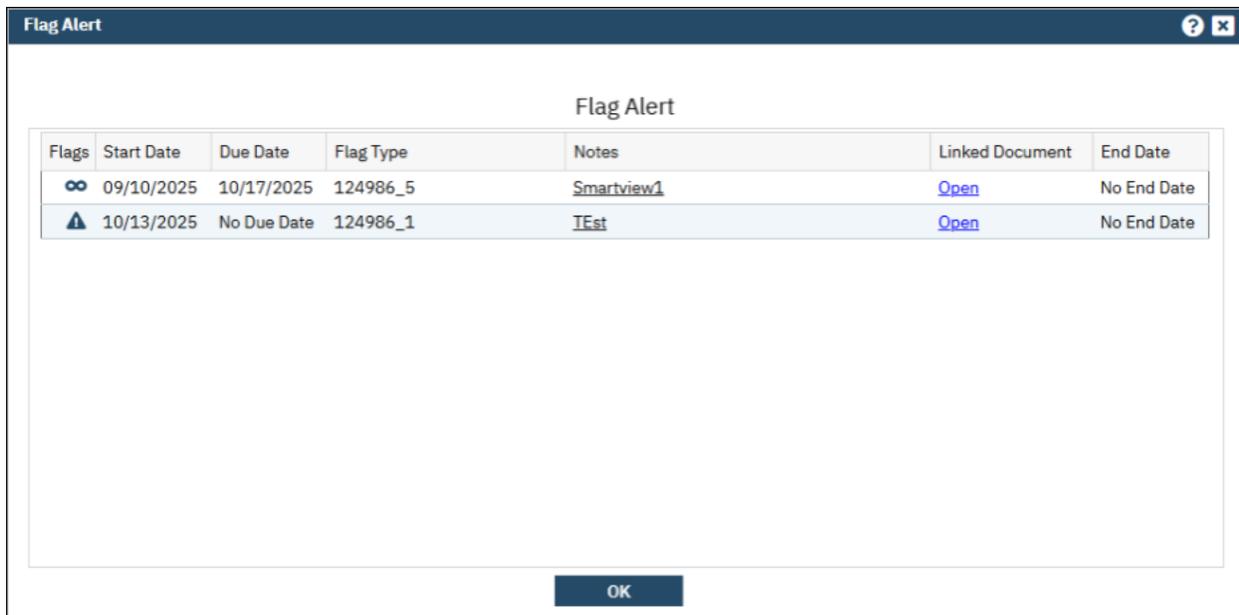
Prerequisites: The client has a discharged program.

Where To Find It:

Path: Client' Search -- 'Flag Alert Pop up window'.

How this helps:

This enhancement improves flag functionality by providing easier visibility of the Due Date. Clients can conveniently track the Due Date directly from the Flag Alert pop-up.

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11. EII # 132267 (Feature # 585770): To enhance the tracking protocol logic to prevent regeneration of completed flags when non-functional updates are made to Program Enrollment records.

Note: This is a Passive change.

What's Changed:

SmartCare now supports ensuring completed flags are not duplicated due to non-substantive changes, maintaining system accuracy, and preventing unnecessary rework. This passive change enhances the logic to prevent duplicate flag creation when flags generated by the Tracking Protocol are already in an 'End/Completed' status.

'Tracking Protocol' Enhancement

The updated logic now checks existing 'ClientTrackingProtocol' and 'ClientNotes' records before creating new entries. This ensures that the system does not generate a new note if one already exists for the same Tracking Protocol.

With this enhancement, duplicate flags will no longer be created when modifications occur in the following areas:

- Client Episode
- Program Assignment Details
- Treatment Episode Details

Prerequisite:

Tracking Protocol is created and add the flags through the **Path:**

Navigate to 'Administration' → 'Tracking Protocol' → Click on 'New' icon → 'Create a Tracking Protocol' and 'add flags'.

Where to Find It:

- Go to **Clients → Client Flags**
- Select a flag created by the Tracking Protocol and update the **End Date**
- Navigate to **Program Assignment**, **Client Episode**, or **Treatment Episode Details** and make updates, then click **SAVE.**
- Return to **Clients → Client Flags** and verify that flags are **not duplicated.**

How It Helps:
- Ensures that no duplicate flags are generated when modifications occur in the defined areas.
- Improves the data consistency and accuracy in flag tracking.
- Enhances the system reliability for client tracking workflows.

Client Information

Reference No	Task No	Description
12	EII # 131813	Added a new field of "Tribal Affiliation" to the Client Information screen.

12. EII # 131813 (Feature # 557438): Added a new field of "Tribal Affiliation" to the Client Information screen.

Note: This is a Passive Change.

What's Changed:

With this release, a new field 'Tribal Affiliation' has been implemented in the following screens:
- o Client Information (C)
- o Client Information (client)
- o Client Information (Admin)
- o Registration Document

'Tribal Affiliation' field details:
- The 'Tribal Affiliation' field is a typeable search field.
- Users can begin typing (minimum 2 characters) to search and select from predefined values.
- The 'Tribal Affiliation' field Values are retrieved from the GlobalCode category: Tribal Affiliation.
- The field 'Tribal Affiliation' is displayed only when the selected 'Race' matches one of the configured values in the Recode setting: ShowHideTribalAffiliateSectionOnDemographicsTab
- A scheduled job runs daily at 12:00 AM server time to automatically clear Tribal Affiliation values for clients whose Race no longer matches the configured Recode list.
- The 'Tribal Affiliation' field is cleared and hidden when the Race is changed.

Screen shots:

Client Information (C):

Client Information (Client):

Client Information (Admin):

Registration Document:

New Recode Category:

Category Code: ShowHideTribalAffiliateSectionOnDemographicsTab
Category Name: ShowHideTribalAffiliateSectionOnDemographicsTab
Mapping Entity: GlobalCodes.GlobalCodeId
Description: This Recode Category is used to control the display of the Tribal Affiliation field on the following screens: Client Information (C), Client Information, Client Information (Admin), and Registration. Customers can configure this by adding Race Global Code IDs to the Recode setup. If a selected race matches one of the configured values, the Tribal Affiliation field will be displayed on the specified screens.

New Global Code:
Category Code: TribalAffiliation
Category Name: TribalAffiliation

Active: Yes

Allowed to Add/Modify/Delete Codes: Yes

Allowed to modify code names: Yes

Allowed to modify sort order: Yes

Has subcodes: No

Description: This global code category will be used to map global codes that will be used to display values in the Tribal Affiliation Field on Client Information (C), Client Information, Client Information (Admin), and Registration.

Where To Find It:

Path 1: Client' search -- Select Client -- 'Client Information (C)' -- 'Demographics' Tab.

Path 2: Client' search -- Select client -- 'Client Information (Client)' -- 'Demographics' Tab.

Path 3: Client' search -- Select client -- 'Client Information (Admin)' -- 'Demographics' Tab.

Path 4: Client' search -- Select client -- 'Registration Document' -- 'Demographics' Tab.

Path 5: Administration -- 'Global Codes' -- 'Global Codes' list page -- Search and select 'TribalAffiliation' -- 'Global Code Details' screen.

Path 6: Administration -- 'Recodes' -- 'Recodes' list page -- Search and select 'ShowHideTribalAffiliateSectionOnDemographicsTab' -- 'Recode Detail' screen.

How It Helps: To support USCDI v3 compliance under HTI-1, SmartCare is including the Tribal Affiliation data element in Patient Demographics for CCD and future FHIR export.

Data Model Changes:
- **Clients table:**
  - New Column: TribalAffiliation
- **DocumentRegistrationDemographics table:**
  - New Column: TribalAffiliation

Client Orders

Reference No	Task No	Description
13	EII # 131860	Added new Order Status value called 'Pending Specimen Collection' in Client Orders List page, Client Orders Details page and Orders List page.

13. EII # 131860 (Feature # 559046): Added new Order Status value called 'Pending Specimen Collection' in Client Orders List page, Client Orders Details page and Orders List page.

Note: This is a Passive Change.

What's Changed:

A new order status value 'Pending Specimen Collection' has been introduced to improve workflow efficiency and data accuracy in lab integrations. This status helps in identifying orders that are awaiting specimen collection.

A new order status 'Pending Specimen Collection' is added to the Orders Status dropdown in:
- Filter section in the Client Orders List page.
- Order Entry Details section in Client Orders Details page.
- Filter section in Orders List page.

To achieve this, a new recode category LabsRequiringSpecimenInfo is added in the Recode Detail screen.

Recode Category: LabsRequiringSpecimenInfo
- **Purpose:** Identifies labs requiring electronic transmission of specimen collection data.
- Recode Type: DOMAIN (8401)
- Mapping Entity: Laboratories.LaboratoryID

Automatic Status Update:
- The status will be changed to 'Pending Specimen Collection', on selecting 'Onsite Specimen Collection' checkbox only when the Lab is added to the 'LabsRequiringSpecimenInfo' recode.
- When 'Onsite Specimen Collection' checkbox is selected and Client Order is signed, then automatically order status will be changed to 'Pending Specimen Collection'
- The Specimen Collected checkbox and Collection Date field will be disabled once they are updated and save. If user enters incorrect date/time, then order can be discontinued and a new client order can be created.
- Once the Specimen Collected checkbox and Collection Date is entered and Saved, then the status will be changed from 'Pending Specimen Collection' to 'Sent to Lab'.

Prerequisites:

In the Order Setup, copy the Laboratories added for the order and insert the copied Laboratories in the following 'LabsRequiringSpecimenInfo' recode category through the **Path:**

Go search – 'Administration' – 'Recodes' screen – Select 'LabsRequiringSpecimenInfo' recode category – Insert the copied Laboratories from the Order setup screen – click on 'Save'.

Where to Find It:

Path 1: 'Administration' -- 'Orders' -- 'Orders' list page -- Click on New -- 'Order Details' screen -- Select 'Order Type' as 'Lab' -- Enter the required details – Select the required Laboratories -- Click on 'Save'.

Path 2: 'Client' -- 'Client Orders' -- 'Client Orders' list page -- Click on New -- 'Client Order' details screen -- Select the 'Order' (created in Navigation Path 2) -- Enter the required fields -- Click on 'Insert' – Select 'Onsite Specimen Collection' checkbox -- Click on 'Save' and 'Sign'.

Path 3: 'Client' -- 'Client Orders' -- 'Client Orders' list page – Click on Client Order created in Navigation Path 2 – Select 'Specimen Collected' checkbox and enter Date – Click on Save.

Path 4: 'My Office' -- 'Orders'.

How this Helps:

The user can filter for any lab order that is awaiting specimen collection and is able to document a collection date/time for a lab draw and ensure that this cannot be changed and information is accurate.

Client Statement

Reference No	Task No	Description
14	EII # 132126	Implementation of the Payment instruction and printed on the same page without page breaks on statement PDF.

14. EII # 132126 (Feature # 576361): Implementation of the Payment instruction and printed on the same page without page breaks on statement PDF.

Note: This is a Passive Change.

What's Changed:

The SmartCare updates the payment instruction text and adjusts the layout of the Client Statement PDF so that the Payment Instruction, Client Information, Credit Card Information, and Address sections appear together on the same page without page breaks.

1.Payment Instruction Update:

The instruction text has been revised from: "Please return the bottom portion of this bill with your payment" to: **"Please detach and return this portion of the bill with your payment."**

2. Placement Consistency:

- The system will display 'Instruction', 'Client Information', 'Credit Card Information', and 'Billing Address' sections together on a single page.
- If the statement exceeds one page, the entire section beginning with the new instruction remains together on the same page.
- The layout prevents content from splitting across multiple pages.

 Screenshot of Client Statement showing the updated Payment instruction

Main Office Located at:
1301 W 22nd St,
Oak Brook, OH 60523
Phone: 8017436164
Fax: 8017436164

Aura A
788 main road
alexandria, IL 60001

Client Name: Aura A
Client ID: 11860
Statement Date: 11/08/2025
Balance due on 11/18/2025

Date of Service	Procedure / Duration	Provider	Fee	Insurance Payment	Adjustment	Client Payment	Insurance Balance	Client Balance
	Prior Balance						$0.00	$0.00
10/20/2025	Gnmh 70	Test01	$200.00	$0.00	$0.00	$0.00	$0.00	$200.00
10/22/2025	Gnmh 5	Test01	$200.00	$0.00	$0.00	$0.00	$0.00	$200.00
10/23/2025	Gnmh 60	Test01	$400.00	$50.00	$0.00	$0.00	($50.00)	$400.00
						Totals:	($50.00)	$800.00

*Prior Balance – Transactions with activity 30 days prior to the Statement Date are combined in the Prior Balance line.

Please detach and return this portion of the bill with your payment.

Total Due from Client: $800.00　　　　　　　Client Name: Aura A

Where to Find It:

Path: Go to 'My Office' - Select 'Client Accounts' - 'Client Accounts' list page – Select 'Client ID' checkbox – Click on 'Generate Statements' icon – 'Generate Statements' popup is opened – Enter the required 'Date Fields' and Click on 'OK' button. – 'Client Statement Printing' popup will be opened.

How It Helps:
- This enhancement ensures a clear, professional, and user-friendly presentation, allowing customers to easily understand the payment process, view all payment-related details in one place, and complete their payments efficiently when viewing or printing client statements.

Client's Chosen Name

Reference No	Task No	Description
15	EII # 132507	To Display Client's Chosen Name based on the value set in DisplayClientChosenName Configuration Key.
16	EII # 132595	Display the client's chosen name in place of the legal name on the Team Scheduling screen in SmartCare.
17	EII # 132596	To display Client's Chosen Name on Client Name header based on the value set in DisplayClientChosenName Configuration Key.

15. EII # 132507 (Feature # 606461): To Display Client's Chosen Name based on the value set in DisplayClientChosenName Configuration Key.

Note: This is a passive change.

What's Changed:

With this Release, the staff can only view the Chosen Name in place of the legal name based on the value set in DisplayClientChosenName Configuration Key

A new Configuration Key 'DisplayClientChosenName' has been introduced, and the purpose of this key is to configure the type of Client Name (Chosen Name or the Legal Name) that must be displayed across some of screens (as mentioned in the configuration key section), in SmartCare:

Configuration Key:

Name: DisplayClientChosenName

Read Key as: Display Client's Chosen Name Instead of their Legal Name.

Allowed Values: Yes, No

Default Value: No

Modules: SCM Admin 2, SCM Client Intake, SCM Methadone, SCM Clinical 2

Description: This is a new feature being added to the core product by introducing a system configuration key. The purpose of this key is to configure the type of Client Name (Chosen Name or the Legal Name) that needs to be displayed across the following screens in SmartCare:

-   Bed Census/ Residential
-   Bedboard
-   Arrivals
-   Reception
-   My Calendar

- If the key-value is set to "Yes", the above screens will display Clients' Chosen Names instead of their Legal Names and in this case, places that have hover information will display their Legal Names.

Note that, if the Chosen Name is not available on the Client record, the existing functionality will take precedence, and the Legal Name will be displayed.

B) If the key-value is set to "No", the above screens will display Clients' Legal Names instead of their Chosen Names and in this case the hover information will display their Chosen Names. **This will be the default value of the key as it drives the existing behavior.**

Note:

If by chance the value of the key is updated with any value apart from the allowed values, the system **will consider the default behavior, i.e. same as the key value being "No".**

a.   **Bed Census:**
- When the configuration key is set to 'Yes' the Chosen Name will be displayed in the "Client" column of the list page and legal name is displayed when mouse hovered on '@' icon. If the Chosen Name is not available, the Legal Name will be displayed in the 'Client' column.

- The Client Search can be done using the client's chosen name.

b. **Bedboard:**
- When the configuration key is set to 'Yes', the Chosen Name will be displayed in the "Client" column of the list page and legal name is displayed when mouse hovered on '@' icon. If the Chosen Name is not available, the Legal Name will be displayed in the 'Client' column.

- The Client Search can be done using the client's chosen name.

c. **Arrivals:**
- When the configuration key is set to 'Yes' the Chosen Name will be displayed in the "Client" column of the list page and legal name is displayed when mouse hovered on '@' icon. If the Chosen Name is not available, the Legal Name will be displayed in the 'Client' column.

d. **Reception:**
- When the configuration key is set to 'Yes' the Chosen Name will be displayed in the "Client" column of the list page and legal name is displayed when mouse hovered on '@' icon. If the Chosen Name is not available, the Legal Name will be displayed in the 'Client' column.

e. **My Calendar:**
- When the configuration key is set to 'Yes' the Chosen Name will be displayed in the Appointment display and its hover information and when configuration key is set to 'No' the Legal Name will be displayed in the Appointment display and its hover information.

Prerequisite: Create entries based on the selected client to be displayed on the following screens.
a. Bed Census
b. Bedboard
c. Arrivals
d. Reception
e. My Calendar

Where to Find It:

Path 1: 'Administration'– 'Configuration Keys' - 'Configuration Keys' list page – Click on 'DisplayClientChosenName' configuration key name hyperlink – 'Configuration Key Details' page – Set the value to 'Yes' and click on 'Save' icon.

Path 2: 'Client'– 'Client Information' - 'Client Information' page – Click on 'Aliases' tab – Select required data and check 'Chosen Name' checkbox and click on 'Insert' button – Click on 'Save' icon.

Path 3: 'My Office'– 'Bed Census' – 'Bed Census' list page – Mouse hover on above selected client name '@' character

Path 4: 'My Office'– 'Bedboard' – 'Bedboard' list page – Mouse hover on above selected client name '@' character.

Path 5: 'My Office'– 'Arrivals' – 'Arrivals' list page – Mouse hover on above selected client name '@' character.

Path 6: 'My Office'– 'Reception' – 'Reception' list page – Mouse hover on above selected client name '@' character.

Path 7: 'My Office'– 'My Calendar' – 'My Calendar' page – Mouse hover on above selected client name '@' character.

How It Helps:

The Chosen Name is displayed more prominently to better ensure that staff address clients by their chosen name, based on the value set in DisplayClientChosenName Configuration Key.

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16. EII # 132595 (Feature # 610187): Display the client's chosen name in place of the legal name on the Team Scheduling screen in SmartCare.

Note: This is a passive change.

What's Changed:

A new configuration key called 'DisplayClientChosenName' has been introduced to allow the system to display a client's Chosen Name (from Client Information → Alias) in place of the Legal Name on the Team Scheduling screen.

With this update, Staff can now view the client's chosen name instead of their legal name on the Team Scheduling Screen.

When the config key DisplayClientChosenName value is set to 'Yes' and the 'View by Client' filter option is used, it displays the Client Chosen Name under the 'Client' column of the Team Scheduling grid.

When the config key DisplayClientChosenName value is set to 'Yes' and the 'View by Staff' filter option is used, it displays the Chosen Names of Client(s) under each Staff schedule block of the Team Scheduling grid.

When the config key DisplayClientChosenName value is set to 'Yes', it displays the Chosen Names of Client(s) under the Client Name column of the 'Default Values' grid on the 'Team Scheduling Details' pop-up.

Prerequisite Setup:

1. There is at least one 'Alias' name for the required client, and it is selected as a 'Chosen Name'.

   Path: Search Client Information (C) – Client Search pop-up – Select the Client - Client Information screen – Click on Aliases tab – Add First & Last Name under 'Client Alias' section – Select the 'Types' as 'Alias' – Check the 'Chosen Name' checkbox – Click on 'Insert' button – Click on 'Save' button.

2. The 'DisplayClientChosenName' System Configuration Key value is set as 'Yes'.

   Path: Search & navigate to Configuration Keys screen – Input 'DisplayClientChosenName' in the Search textbox – Click on 'Apply Filter' button – Click on the 'DisplayClientChosenName' hyperlink on the list page – Input 'Yes' in the 'Value' – Click on 'Save' button.

Where to Find It:

Path 1: SmartCare Application – Search and navigate to 'Team Scheduling' screen – Select the Program – Choose the 'Week of' – Click on the 'View by Client' radio button – Click on 'Apply Filter' – Check the 'Client' column values.

Path 2: SmartCare Application – Search and navigate to 'Team Scheduling' screen – Select the Program – Choose the 'Week of' – Click on the 'View by Staff' radio button – Click on 'Apply Filter' – Check the Client Names displayed in the 'Schedule' blocks for the Staff.

Path 3: SmartCare Application – Search and navigate to 'Team Scheduling' screen – Select the Program – Choose the 'Week of' – Click on the 'View by Staff' radio button – Click on 'Apply Filter' – Click on the 'Schedule' button in the Date columns of the grid - 'Team Scheduling Details' pop-up – Check for the 'Client Name' column under 'Default Values' grid.

How It Helps:

Displaying the client's Chosen Name directly on SmartCare screens ensures staff consistently address clients by their preferred name.

17. EII # 132596 (Feature # 610188): To display Client's Chosen Name on Client Name header based on the value set in DisplayClientChosenName Configuration Key.

Note: This is a Passive change.

What's Changed:

The Client tab header will display the client Chosen Name (from Client Information > Alias) in place of the legal name based on the value set in DisplayClientChosenName Configuration Key.

When Configuration Key value set as 'Yes'

The Client tab header will display Clients' Chosen Names instead of their Legal Names and in this case, the hover information will display their Legal Names.

When configuration key value set as 'No'

The Client tab header will display Clients' Legal Names instead of their Chosen Names and in this case the hover information will display their Chosen Names. This will be the default value of the key as it drives the existing behavior.

By default, the configuration key value 'DisplayClientChosenName' will be 'No'

Note 1: If by chance the value of the key is updated with any value apart from the allowed values, the system will consider the default behavior, i.e. same as the key value being "No".
Note 2: if the Chosen Name is not available on the Client record, the existing functionality will take precedence, and the Legal Name will be displayed.

Prerequisite:
Ensure that 'Chosen Name' is selected for respective Client in Client information (C) screen of Aliases tab.

Where To Find It:

Path: Select Client -- view Client tab header.

How It Helps:

Displays the Chosen Name more prominently to better ensure that staff address clients by their chosen name based on the value set in DisplayClientChosenName Configuration Key.

Core Assessment

Reference No	Task No	Description
18	EII # 131856	Core Assessment: ASAM Summary Button does not initialize the ASAM Final Determination Tab.

18. EII # 131856 (Feature # 558786): Core Assessment: ASAM Summary Button does not initialize the ASAM Final Determination Tab.

Note: This is Passive change.

What's Changed:

The following Initialization changes have been implemented for Core Assessment:

1.On clicking 'Initialize Most Recent ASAM Final Determination' button in the 'Summary/ Level Care' tab of Assessments (C) Document will initialize the most recent data from the following documents:

1. From the last signed 'ASAM' Document.
2. From the last signed 'Core Assessment' document that has the 'ASAM' tab.
3. From the Current 'In Progress' Core Assessment document has the 'ASAM and Summary/ Level of Care' tabs, then following scenarios would apply.

   i.) If the user does not complete the ASAM tabs within the Core Assessment but selects the 'Initialize Most Recent ASAM Final Determination', then nothing would initialize.

   ii.) If the user completes the ASAM tabs within the Core Assessment, selects the 'Initialize Most Recent ASAM Final Determination', then data would initialize.

2. The 'RODS' document data will get initialized from the following documents:

- From the last signed Assessment (custom or core) document that has the 'Substance Use' tab, from the 'History and Current Use of Substance' Section which contains the drug list.
- From the current 'In Progress' Core Assessment document, that has the 'Substance   Use' and 'RODS' tab.

Note: As of now, only 'Heroin and Other Opiates or synthetics' , these two drugs are getting initialized to RDOS document from Substance Use tab.

Where To Find It:

Path 1: Client– Select 'ASAM' document – Add data – Save – Sign.

Path 2: Client– Select 'Summary/ Level of Care' document – Add data – 'Save' – Sign.

Path 3: Client– Select 'Assessments (C)' – Select required input to display 'Substance Use' /'Summary /Level of Care'/ 'ASAM'/'RODS' tab – add data - 'Save' – Sign.

Path 4: Client – Select RODS document.

How It Helps:

~~In the **Summary/Level of Care** tab of the Core Assessment, there is a field called **"Initialize Most Recent ASAM Final Determination."** With the new Core Assessment functionality, the ASAM document can appear as a tab within the Core Assessment. The logic for the **"Initialize Most Recent ASAM Final Determination"** field has been updated to pull values from the existing **"In Progress"** ASAM tabs.~~

~~Additionally, when both the **RODS** tab and the **Substance Use** tab are enabled in the Core Assessment, then while navigating from the **Substance Use** tab to the **RODS** tab, the corresponding RODS values should automatically be pre-selected to improve workflow efficiency and data accuracy.~~

DFA (Dynamic Form Architecture)

Reference No	Task No	Description
19	EII # 128040	Fixing a security issue with document authorship/security role incongruency.
20	EII # 132296	Implementation of the 'Problem List' dropdown option in the 'DFA architecture'.
21	EII # 131985	Changes are Implemented to incorporate the 'Problem List' common control into Non-DFA + DFA Documents and Service Notes.
22	EII # 130990	Changes are Implemented to Disposition Common Control into DFA Architecture.

19. EII # 128040 (Feature # 385759): Fixing a security issue with document authorship/security role incongruency.

Note: This is a passive change**.**

What's Changed:

The system introduces a new **System Configuration Key**. When a user assigns an *In Progress* document to a new author, the system displays either a **Pop-Up confirmation message** or a **Red validation message** that states the permissions set for the assigned staff, depending on the Config Key value.

System Configuration key Details:

System Configuration Key: ShowValidationWhenAuthorReassignsADocument

Read Key as: Show Validation When Author Reassigns A Document Or Service Note.

Allowed Values: Yes, No

Default Value: No

Modules: SCM SmartCare Platform and Framework/Document Framework

Description: This is a change to the existing feature of our core product by introducing a system configuration key.

When an In-Progress Document or Service Note is assigned to any other staff, a Pop Up Message (Confirmation) or Red Message (Validation) is shown based on the permission set for the assigned staff.

The Permission of the assigned staff will be one of the following:

a) Has Edit Permission.

b) Does not have both Edit and View permissions.

c) Does not have Edit permission AND has View permission.

This key value is used to decide whether to display the message as Confirmation or Validation.

A) If the key-value is set to "No", the system will show a Confirmation message. **This will be the default value of the key as it drives the existing behavior.**

B) If the key-value is set to "Yes", the system will show a hard stop validation message.

Note:

1. If by chance the value of the key is updated with any value apart from the allowed values, the **system will consider the default behavior, i.e. same as the key value being "No".**
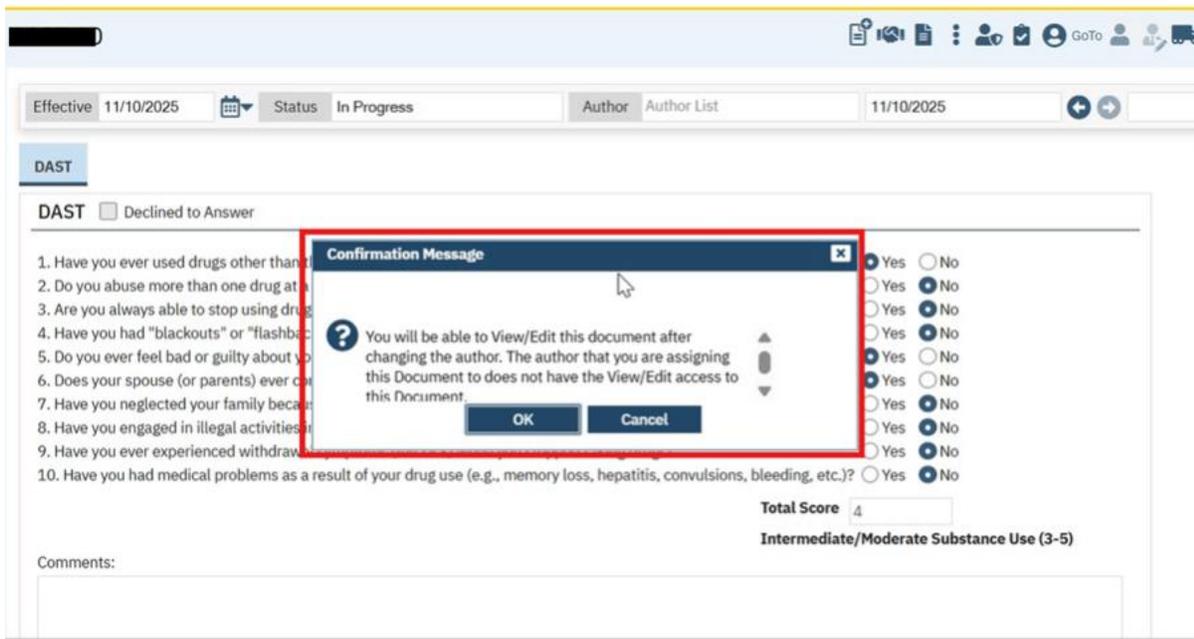
Functionality:

1. When the configuration key is set to '**No'** or left '**Null'**, and the New Author (Proxy user) has Edit permissions (irrespective of View permissions), the system does not display a Confirmation message to the current user when the document author is changed to the Proxy user.
2. When the configuration key is set to '**Yes'**, and the New Author (Proxy user) has Edit permissions (irrespective of View permissions), the system does not display a Red Validation message to the current user when the document author is changed to the Proxy user.
3. When the configuration key is set to '**No'** or left '**Null'**, and the New Author (Proxy user) does not have Edit permission AND does not have View permission, the system will display a below Confirmation message to the current user when the document author is changed to the Proxy user.

Confirmation message: "You will be able to View/Edit this document after changing the author. The author that you are assigning this Document to does not have the View/Edit access to this Document. Do you wish to change the author of this document to <assigned staff>?"

1. When the configuration key is set to '**Yes'**, and the New Author (Proxy user) does not have Edit permission AND does not have View permission, the system will display a below Red Validation message to the current user when the document author is changed to the Proxy user.

Validation message: " The author that you are assigning this Document to does not have the View/Edit access to this Document."

2. When the configuration key is set to '**No'** or left '**Null'**, and the New Author (Proxy user) does not have Edit permission AND has View permission, the system will display a below Confirmation message to the current user when the document author is changed to the Proxy user.

Confirmation message:" You will be able to View/Edit this document after changing the author. The author that you are assigning this Document to has only View access and does not have the Edit access to this Document. Do you wish to change the author of this document to <assigned staff>?"

3. When the configuration key is set to 'Yes', and the New Author (Proxy user) does not have Edit permission AND has View permission, the system will display a below Red Validation message to the current user when the document author is changed to the Proxy user.

Validation message: "The author that you are assigning this Document to has only View access and does not have the Edit access to this Document."
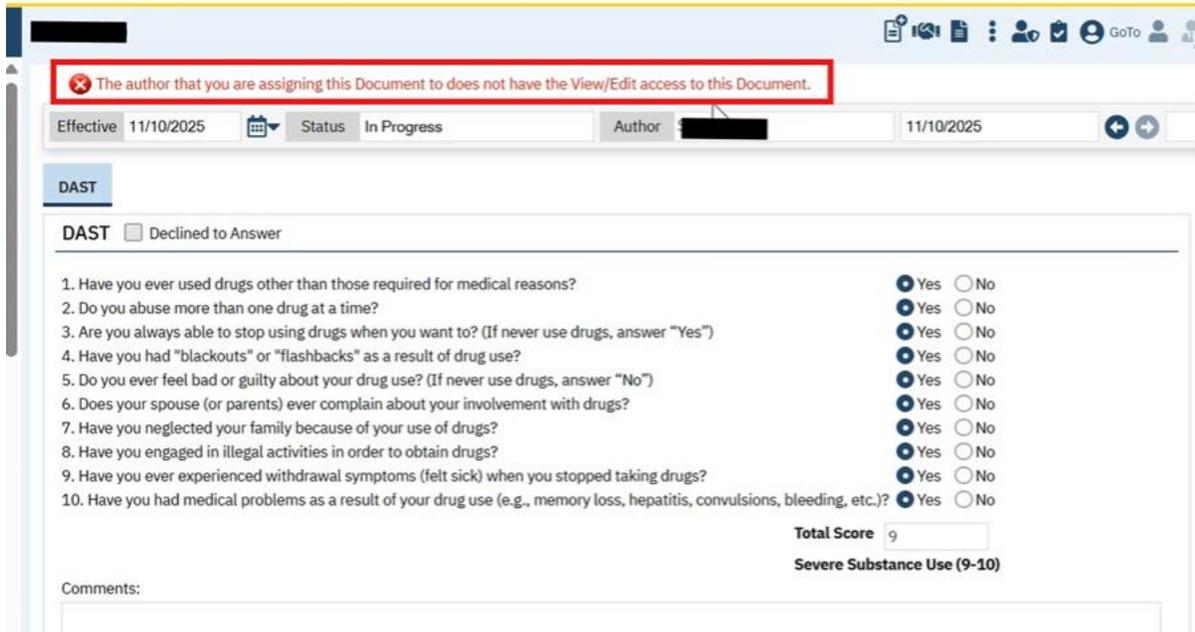

4. When the configuration key is set to 'No' or left 'Null', and the New Author (Other Staff) has Edit permissions (regardless of View permissions), the system does not display a Confirmation message to the current user when the document author is changed to the Other Staff.
5. When the configuration key is set to 'Yes', and the New Author (Other Staff) has Edit permissions (regardless of View permissions), the system does not display a Red Validation message to the current user when the document author is changed to the Other Staff.
6. When the configuration key is set to 'No' or left 'Null', and the New Author (Other Staff) does not have Edit permission AND does not have View permission, the system will display a below Confirmation message to the current user when the document author is changed to the Other Staff.

Confirmation message: "You will be able to only View this document after changing the author. The author that you are assigning this Document to does not have the View/Edit access to this Document. Do you wish to change the author of this document to <assigned staff>?"
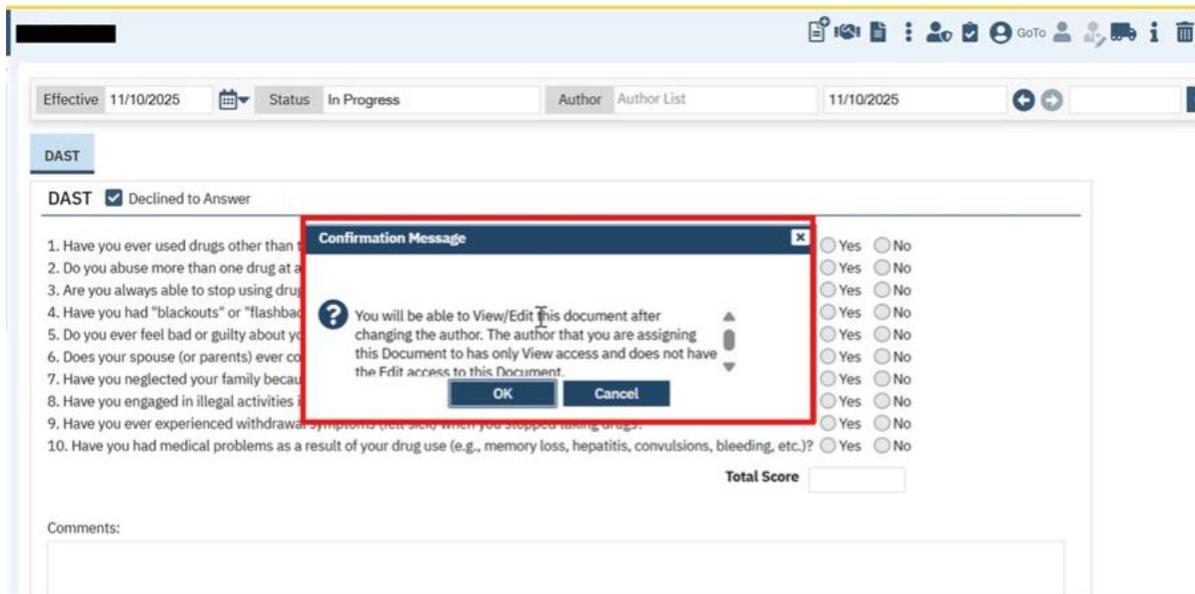
•   When the configuration key is set to 'Yes, and the New Author (Other Staff) does not have Edit permission AND does not have View permission, the system will display a Red Validation message to the current user when the document author is changed to the Other Staff.

Validation message: "The author that you are assigning this Document to does not have the View/Edit access to this Document."

•   When the configuration key is set to 'No' or left 'Null', and the New Author (Other Staff) does not have Edit permission AND has View permission, the system will display a below Confirmation message to the current user when the document author is changed to the Other Staff.

Confirmation message: You will be able to only View this document after changing the author. The author that you are assigning this Document to has only View access and does not have the Edit access to this Document.
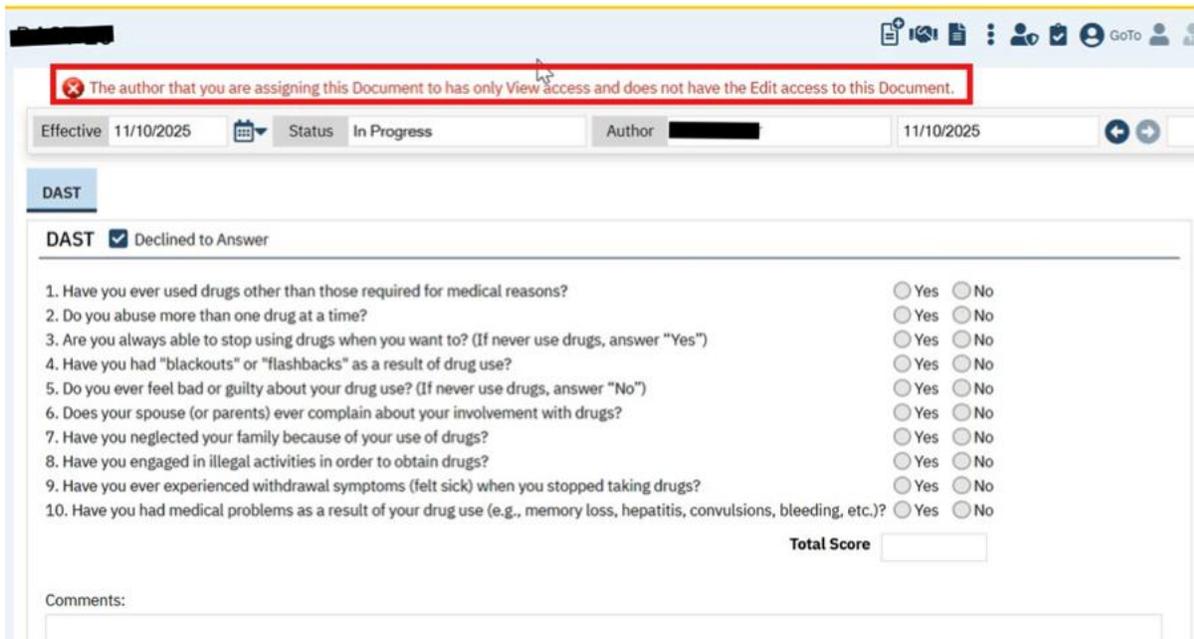
- When the configuration key is set to 'Yes, and the New Author (Other Staff) does not have Edit permission AND has View permission, the system will display a below Red Validation message to the current user when the document author is changed to the Other Staff.

Validation message: The author that you are assigning this Document to has only View access and does not have the Edit access to this Document.

Prerequisites:

- New Author is not having either Documents Edit or Documents View permission for the required Document/Service Notes. This set-up is configured in the Staff Details (Roles and Permission tab) screen.
- 'Allow editing by non-Authors' field is configured as "NO" in the Document Management Screen of the respective Document/Service Note being used.

Where to Find It:

Path: Login to SmartCare application – Client – Documents/Service Notes – InProgress Document – Change the Author – Confirmation Message or Warning Message will appear based on the Setup.

How it Helps:

The system informs the original author when they attempt to reassign a document or service note to a user who lacks the appropriate permissions. The system then allows the original author to either confirm the reassignment or cancel it, based on the setup and the information provided about the assigned user's permissions.

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20. EII # 132296 (Feature # 587126): Implementation of the 'Problem List' dropdown option in the 'DFA architecture'.

Note: This is a Passive change. This change is **specific to the customer** who has **customization logic in their environment.**

What's Changed:

The SmartCare supports the Addition of the 'Problem List' common control into the DFA Editor screen, that helps in enhancing the existing DFA system.

'Problem List' common control Enhancement:

A new field "Common Control" dropdown with 'Problem List' dropdown value has been added under the 'Form Sections' of the 'DFA Editor' screen to enhance the 'DFA system' to include the ability to select 'Problem List' control. This allows users to insert specified common controls into their 'DFA Service Notes' as needed.

o   When the 'Problem List' common control is selected in the dropdown option, then only the following listed fields are enabled under 'Form Sections' and Other fields will be disabled.

DFA Entries:

o   Sort Order
o   Place on Top Of Page
o   Active (Yes, No options)
o   Custom Identifier

o   When 'Common Control (Problem List)' is added in the 'Form' section, the corresponding 'Form Section Groups' and Form Items will be disabled.

o   Users can add the common control (Problem List) between the sections in the 'Preview 'of the DFA Service Notes.
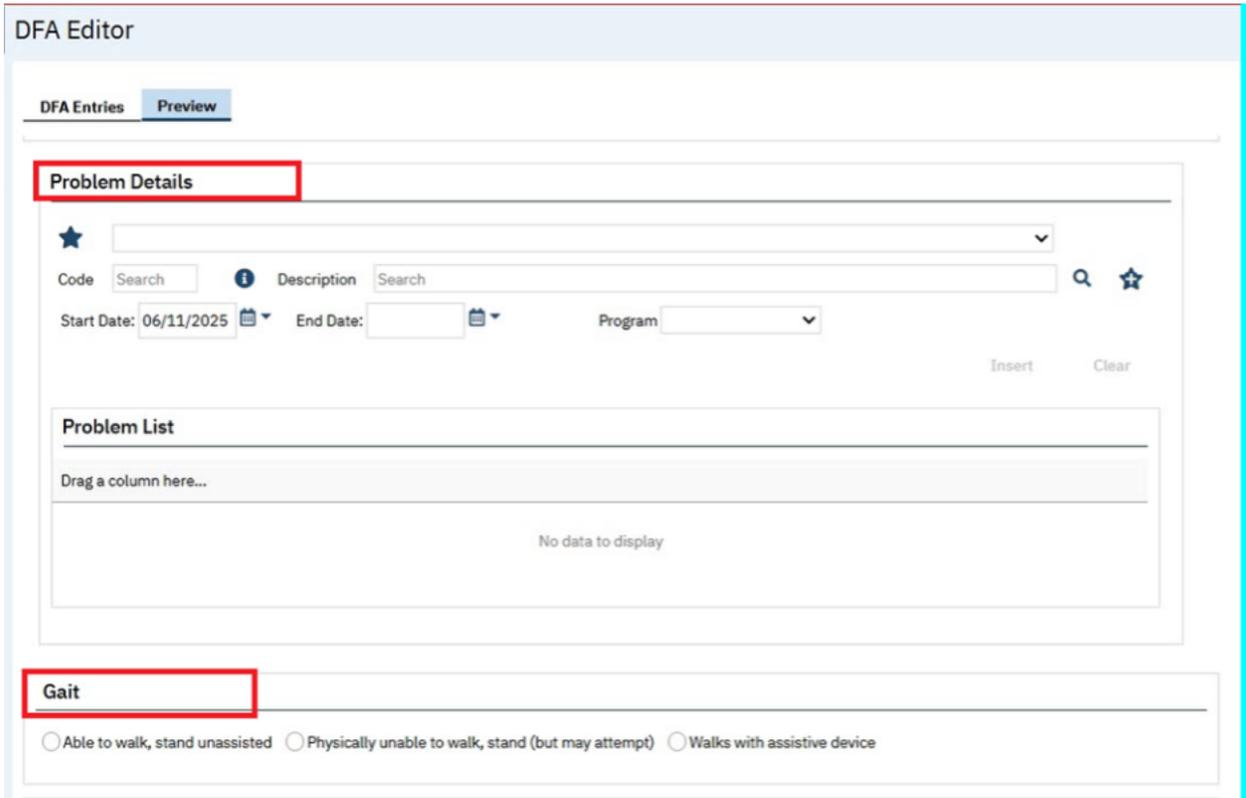
o   If the same common control is added more than once within the same form, then the system will display the following warning message.

Warning Message: "This Common Control already exists in the Form Section".

'From Sections' Grid:

When the user clicks on the 'Insert' button after selecting the 'Common Control' dropdown, the 'Common Control' column will be displayed with the selected control (Problem List) in the 'Grid' section.

'**Preview' tab:** The specified common control in the 'Forms Section' will be displayed in the 'Preview' tab.

Where to Find It:

Path: 'Administration' -- 'Forms' -- 'Forms' list page -- Select any form -- 'DFA Editor' screen – 'Form Sections' section -- 'Common Control' dropdown field.

How It Helps:

The existing DFA system is enhanced to allow for additional "Controls" to be part of DFA definitions.

- This helps to select a control (Problem List) from the DFA editor.
- The user can be able to add the common controls in their DFA Service Notes.

21. EII # 131985 (Feature # 565635): Changes are Implemented to incorporate the 'Problem List' common control into Non-DFA + DFA Documents and Service Notes.

Note: This is a Passive Change.

What's Changed:

The SmartCare supports the Addition of the 'Problem List' common control into the DFA Editor screen, that helps in enhancing the existing DFA system.

'Problem List' common control Enhancement:

A new field "Common Control" dropdown with 'Problem List' dropdown value has been added under the 'Form Sections' of the 'DFA Editor' screen to enhance the 'DFA system' to include the ability to select 'Problem List' control. This allows users to insert specified common controls into their non-DFA + DFA Documents and Service Notes as needed.

- When the user selects 'Problem List' common control in the dropdown option, only the following fields are enabled under Form Sections. Other fields are disabled.
  - o Sort Order
  - o Place on Top
  - o Active
  - o Custom Identifier

- When common control is added in the 'Form Sections', corresponding Form Section Groups and Form Items are disabled.
- Users can add the common control (Problem List) between the sections in the 'Preview 'of the DFA documents and Service Notes.
- If the same common control is added more than once within the same form, then the below mentioned warning message will be displayed.

  Warning Message: This Common Control already exists in the Form Section.

'From Sections' Grid:

  o   When the user clicks on the 'Insert' button after selecting the 'Common Control' dropdown, the 'Common Control' column displays with the selected control (Problem List) in the 'Grid' section.

'Preview' tab: The specified common control in the 'Forms Sections' is displayed in the 'Preview' tab.

Where To Find It:

Path: 'Administration' -- 'Forms' -- 'Forms' list page -- Select any form -- 'DFA Editor' screen – 'Form Sections' section.

How It Helps:

The existing DFA system is enhanced to allow for additional "Controls" to be part of DFA definitions.

  o   Provides ability to select 'Problem List' control from the DFA editor.
  o   The user can add the common controls in their non-DFA + DFA Documents and Service Notes.

22. EII # 130990 (Feature # 543965): Changes are Implemented to Disposition Common Control into DFA Architecture.

Note: This is a Passive Change.

What's Changed:

The SmartCare supports the Addition of the 'Care Coordination Disposition' common control into the DFA Editor screen, that helps in enhancing the existing DFA system.

'Care Coordination Disposition' common control Enhancement:

A new field "Common Control" dropdown with 'Care Coordination Disposition' dropdown value has been added under the 'Form Sections' of the 'DFA Editor' screen to enhance the 'DFA system' to include the ability to select 'Care Coordination Disposition' control. This allows users to insert specified common controls into their DFA Documents.
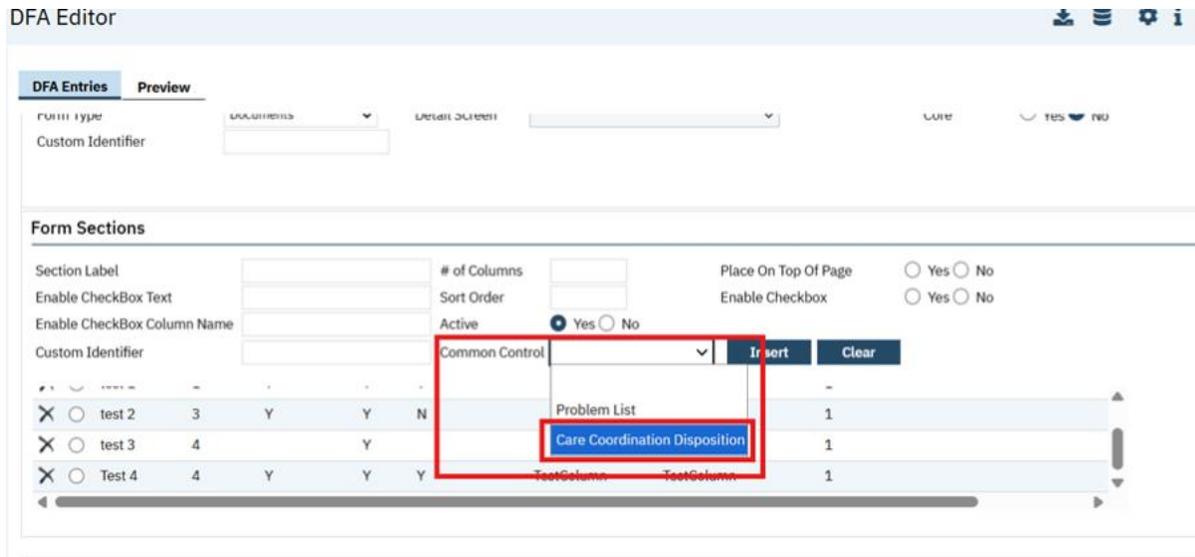
1. When the user selects 'Care Coordination Disposition' common control in the dropdown option, only the following fields are enabled under Form Sections. Other fields are disabled.
   a. Sort Order
   b. Place on Top
   c. Active
   d. Custom Identifier
2. When common control is added in the 'Form Sections', corresponding Form Section Groups and Form Items are disabled.
3. Users can add the common control (Care Coordination Disposition) between the sections in the 'Preview' of the DFA documents.
4. If the same common control is added more than once within the same form, then the below mentioned warning message will be displayed.

   Warning Message: This Common Control already exists in the Form Section.

'From Sections' Grid:
- When the user clicks on the 'Insert' button after selecting the 'Common Control' dropdown, the 'Common Control' column displays the selected control (Care Coordination Disposition) in the 'Grid' section.

'Preview' tab: The specified common control in the 'Forms Sections' is displayed in the 'Preview' tab.

The system displays the added Common Control in the DFA Document:

The system displays added Common Control in the DFA Document PDF.

Where To Find It:

Path: 'Administration' -- 'Forms' -- 'Forms' list page -- Select any form -- 'DFA Editor' screen – 'Form Sections' section

How It Helps:

The SmartCare supports the Addition of the 'Care Coordination Disposition' common control into the DFA Editor screen, that helps in enhancing the existing DFA system.

Dictionaries

Reference No	Task No	Description
23	EII # 129944	Dictionary Setup - Review of Systems
24	EII # 131955	Dictionary Setup – Procedures
25	EII # 131958	Dictionary Setup - Organ Systems
26	EII # 131959	Dictionary Setup - Reason for Appointment.
27	EII # 131960	Dictionary Setup – N & S Review of Systems
28	EII # 132099	Dictionary Setup - Dictionary List Page
29	EII # 129945	Dictionary Setup - Physical Exam.

23. EII # 129944 (Feature # 489490): Dictionary Setup - Review of Systems.

Note: This is a Passive Change.

What's Changed:

 As part of the Dictionary Setup initiative, implemented a dedicated **'Dictionaries – Review of Systems' list page**. This page can be accessed via the 'Review of Systems' hyperlink on the 'Dictionaries' list page.

Key Functionalities on the '**Dictionaries - Review of Systems'** list page:

1. Toolbar with 'New' icon for creating a new 'Review of Systems'.
1. Filter Section with 'Review of Systems:' multiselect dropdown and 'Active Only' checkbox.
- 'Mark Inactive' button for inactivating the Review of Systems.
- Grid for showing a list of 'Review of Systems'.
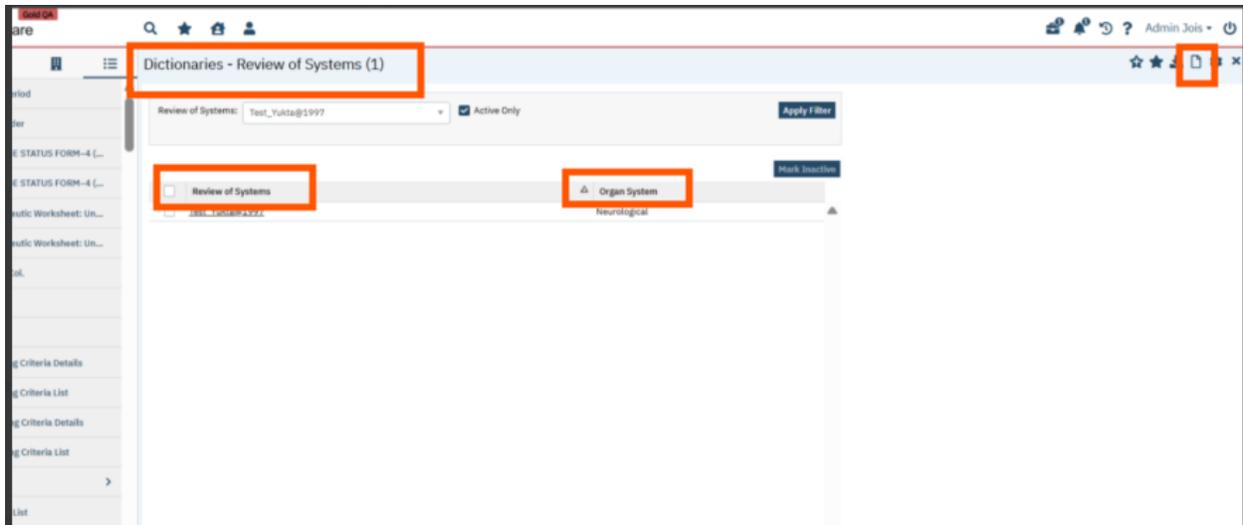
'Review of Systems – New' pop-up:

Clicking on the 'New' button will open up the 'Review of Systems - New' pop-up.
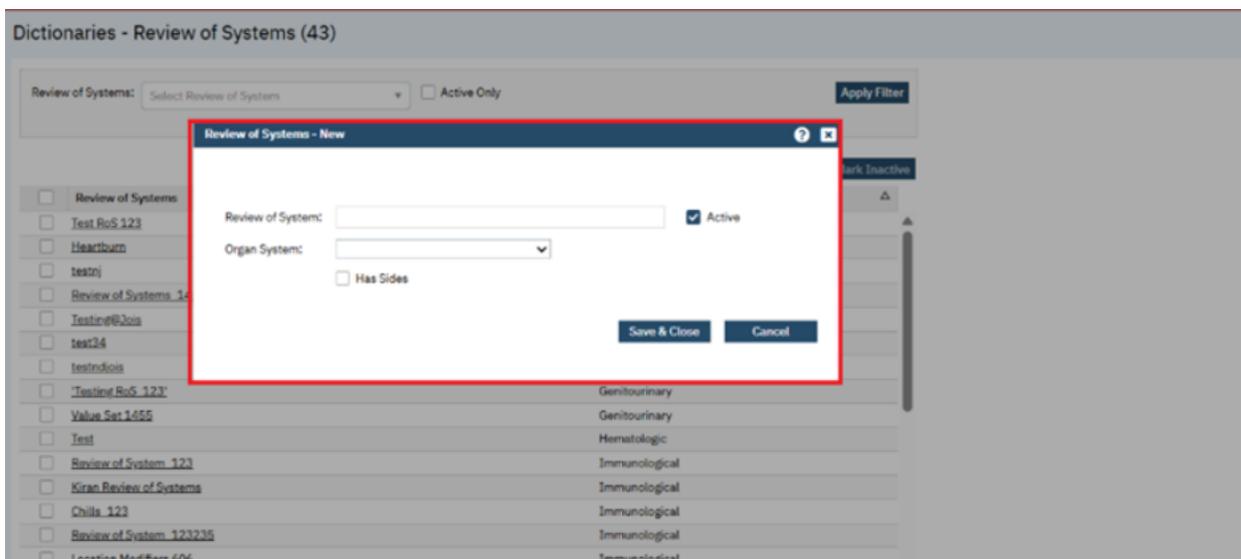
- • 'Review of Systems - New' pop-up will be displayed with a blank '**Review of System:**' Textbox, which accepts up to 100 Alphanumeric and special characters.
  1. An '**Organ System**:' dropdown that displays only active values from the 'Organ Systems' dictionary.
  I. A standard red error message will be displayed if no value is entered in the 'Review of System:' Textbox and clicked on the Save & Close button.
- • When the user tries to save an already existing Review of System, a red error message will be displayed as below:

Warning Message: 'This Review of Systems Name already exists. If you do not see the Review of System listed, please check the Inactive Review of Systems.'

- • A standard red error message will be displayed if no value is selected in the 'Organ System:' dropdown and clicked on the Save & Close button.

Warning Message: 'Organ System is required.'
- A '**Has Sides**' checkbox is displayed unchecked by default.
- An 'Active' checkbox is displayed checked by default – It is used to make Review of System Active & Inactive.
- A 'Save & Close' button is used to insert a new Review of System into the grid.
- A 'Cancel' button to close the 'Review of Systems – New' pop-up.

'Filter section' :
- '**Review of System:**' multiselect dropdown displays all the Review of System values, which are listed in the grid.
- 'Active Only' checkbox helps to filter only 'Active' Review of Systems into the grid if checked. (If unchecked, it considers all the 'Review of Systems' to display)
- The 'Apply Filter' button is used to filter the Review of Systems based on the filter options selection.

'Review of Systems Grid' section:
- All the Review of Systems are displayed within the grid based on the 'Apply Filter' option selection.
- 'Mark Inactive' button is displayed to make the selected 'Review of System' inactive.
- Grid header is displayed with a 'Select All' checkbox, a 'Review of Systems' column name, and an 'Organ Systems' column name.
1. Review of System name is displayed with a Hyperlink and a checkbox within the grid.
- Clicking on each 'Review of System' hyperlink on the grid will open the 'Review of Systems - Edit' pop-up for modifying the Review of Systems.
- Associated 'Organ System' name (read only) is displayed against each Review of Systems under 'Organ Systems' column.
- Both Review of Systems and Organ Systems can be sorted alphabetically by clicking on the individual grid column header names.

'Review of Systems - Edit' pop-up:

- 'Review of Systems - Edit' pop-up will be displayed with the selected Review of System pre-filled.
1. An 'Organ System:' dropdown will be pre-filled with an associated 'Organ System' with the selected Review of System.
- A standard red error message will be displayed if no value is entered in the 'Review of System:' Textbox and clicked on the Save & Close button.
- When the user tries to edit the name with an already existing Review of System, a red error message will be displayed as below:

Warning Message: 'This Review of Systems Name already exists. If you do not see the Review of System listed, please check the Inactive Review of Systems.'

- A standard red error message will be displayed if no value is selected in the 'Organ System:' dropdown and clicked on the Save & Close button.

Warning Message: 'Organ System is required.'

- A 'Has Sides' checkbox is displayed checked/unchecked based on the selection when it was saved.
- An 'Active' checkbox is displayed checked if the selected Review for System is 'Active' and unchecked if it is an inactive one.
1. A 'Save & Close' button is used to insert a modified Review for System into the grid.
2. A 'Cancel' button to close the 'Review for Systems – Edit' pop-up.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'Review of Systems' hyperlink – 'Dictionaries – Review of Systems' list page.

How It Helps: It helps to configure the Review of System categories and related symptoms/questions, ensuring clinicians can capture ROS data in a consistent and comprehensive format.

Data Model Changes: Added new table PrimaryCareReviewOfSystemsDictionary

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24. EII # 131955 (Feature # 564849): Dictionary Setup – Procedures.

Note: This is a Passive Change.

What's Changed:

As part of the Dictionary Setup initiative, a dedicated **'Dictionaries - Procedures'** list page is implemented. This page can be accessed via the 'Procedures' hyperlink on the 'Dictionaries' list page.
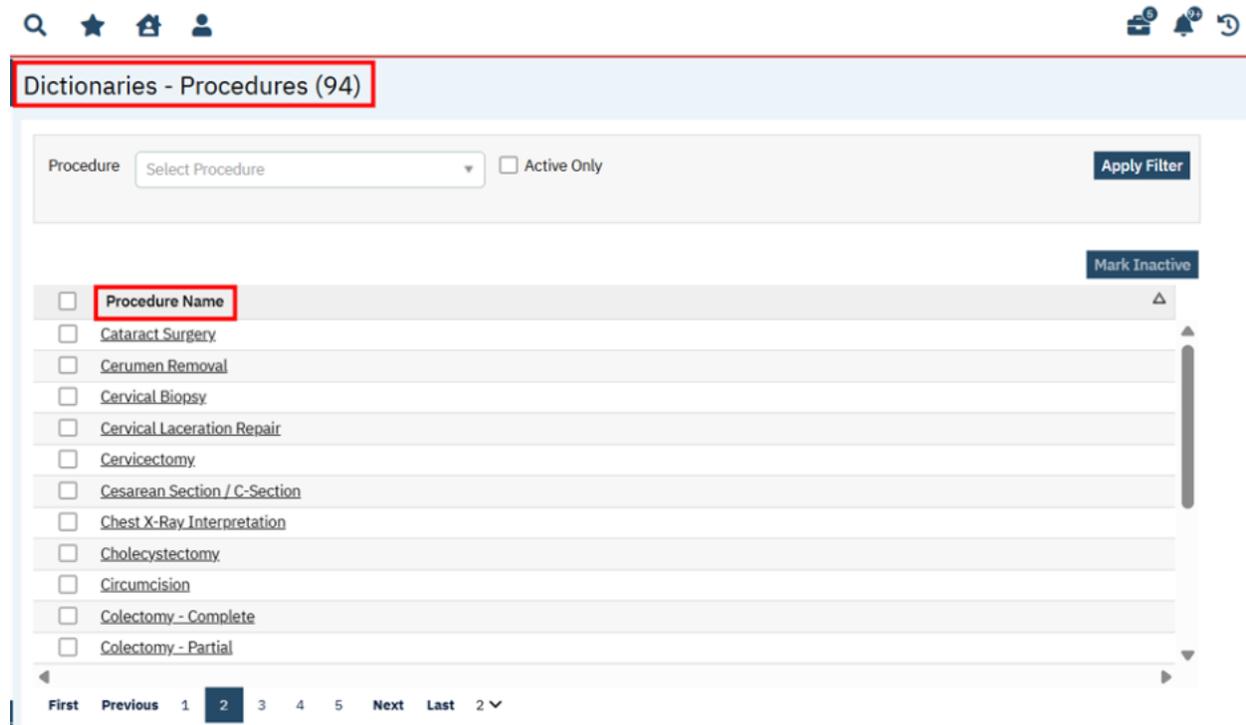
Key Functionalities on the 'Dictionaries - Procedures' list page:

- Toolbar with 'New' icon for creating a new 'Procedure'.
- Filter Section with 'Procedures' multiselect dropdown and 'Active Only' checkbox.
- 'Mark Inactive' button for inactivating the Procedures.
- Grid for showing 'Procedures'.

'Filter section' implementation:

- Filter section with 'Procedures' multiselect dropdown displays all the Procedure values, which are listed in the grid.
- 'Active Only' checkbox helps to filter only 'Active' procedures into the grid if checked. (If unchecked, it considers all the Procedures to display)
- The 'Apply Filter' button is used to filter the Procedures based on the filter options selection.

'Procedures Grid' implementation:

1. All the Procedures are displayed within the grid based on the 'Apply Filter' option selection.
2. 'Mark Inactive' button is displayed to make the selected 'Procedure' inactive.
3. Grid header is displayed with a 'Select All' checkbox and a Procedure Name.
4. Procedure Name is displayed with a Hyperlink and a checkbox within the grid.
5. Clicking on each 'Procedure' hyperlink on the grid will open the 'Procedure - Edit' pop-up for modifying the Procedures.

Clicking on the 'New' button will open up the 'Procedure - New' pop-up.

'Procedure – New' pop-up implementation:
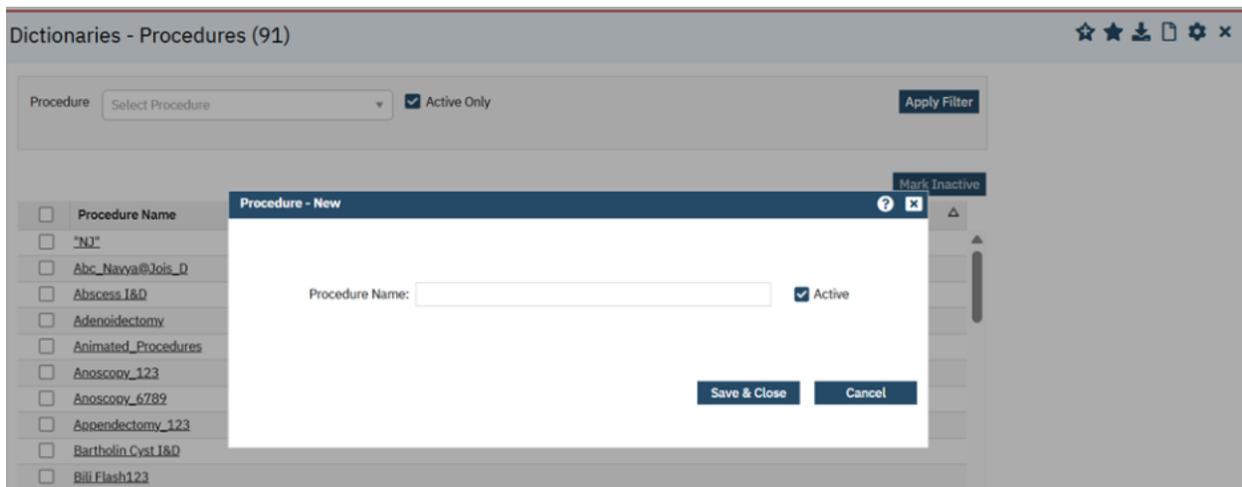
- 'Procedure - New' pop-up will be displayed with a blank 'Procedure Name:' Textbox, which takes up to 100 Alphanumeric and special characters.
- A standard red error message will be displayed if no value is entered in the 'Procedure Name:' Textbox and clicked on the Save & Close button.
- When the user tries to save an already existing Procedure, a red error message will be displayed as below:

Warning Message: _'This Procedure Name already exists. If you do not see the Procedure listed, please check the Inactive Procedures.'_

- An 'Active' checkbox is displayed checked by default – It is used to make Procedure Active & Inactive.
- A 'Save & Close' button is used to insert a new procedure into the grid.
- A 'Cancel' button to close the 'Procedure – New' pop-up.

'Procedure - Edit' pop-up implementation:

- 'Procedure - Edit' pop-up will be displayed with the selected Procedure pre-filled.
- When the user tries to edit the name with an already existing Procedure, a red error message will be displayed as below:

Warning Message: 'This Procedure Name already exists. If you do not see the Procedure listed, please check the Inactive Procedures.'

- An 'Active' checkbox is displayed checked if the selected Procedure is 'Active' and unchecked if it is an inactive one.
- A 'Save & Close' button is used to insert a modified Procedure into the grid.
- A 'Cancel' button to close the 'Procedure – Edit' pop-up.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'Procedures' hyperlink – 'Dictionaries – Procedures' list page.

How It Helps:

It helps users to document surgical and procedure history consistently in the Medical Note.

Data Model Changes: Added new table PrimaryCareProcedureDictionary

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25. EII # 131958 (Feature # 564852): Dictionary Setup - Organ Systems.

Note: This is a Passive Change.

What's Changed:

As part of the Dictionary Setup initiative, implemented a dedicated **'Dictionaries – Organ Systems' list page**. This page can be accessed via the 'Organ Systems' hyperlink on the 'Dictionaries' list page.

Key Functionalities on the '**Dictionaries - Organ Systems'** list page:

- Toolbar with 'New' icon for creating a new 'Organ Systems'.
1. Filter Section with 'Organ System:' multiselect dropdown and 'Active Only' checkbox.
- 'Mark Inactive' button for inactivating the Organ Systems.
- Grid for showing 'Organ Systems'.
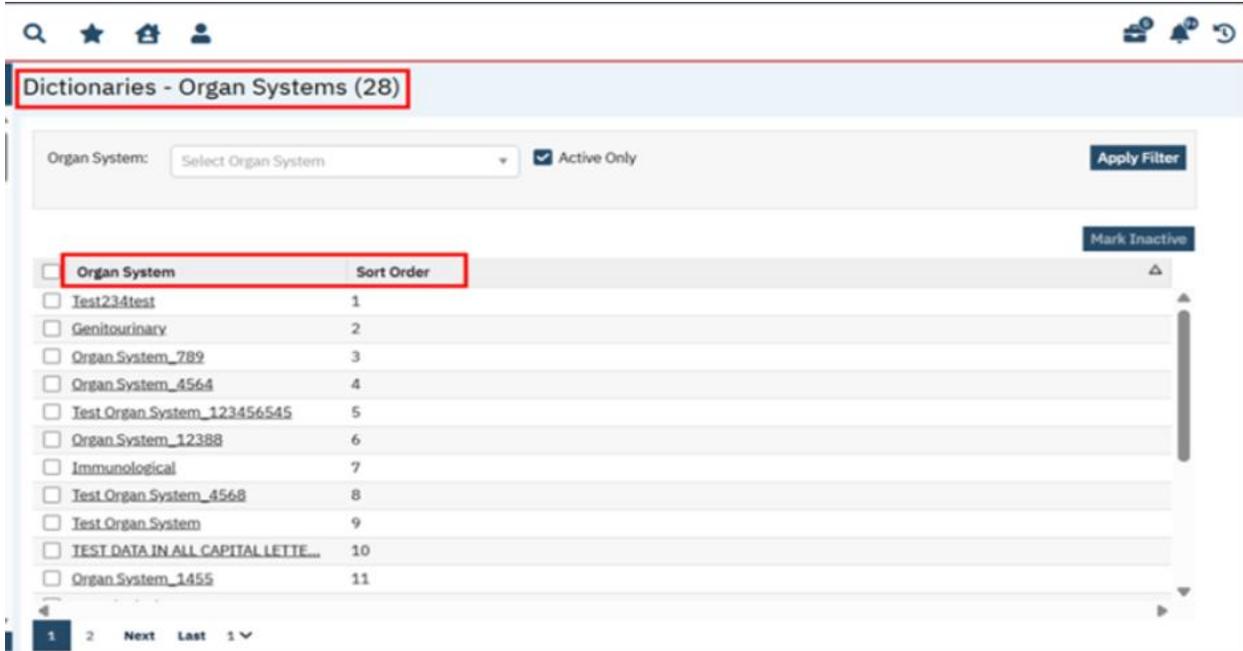
'Organ Systems – New' pop-up implementation:

Clicking on the 'New' button will open the 'Organ Systems - New' pop-up.
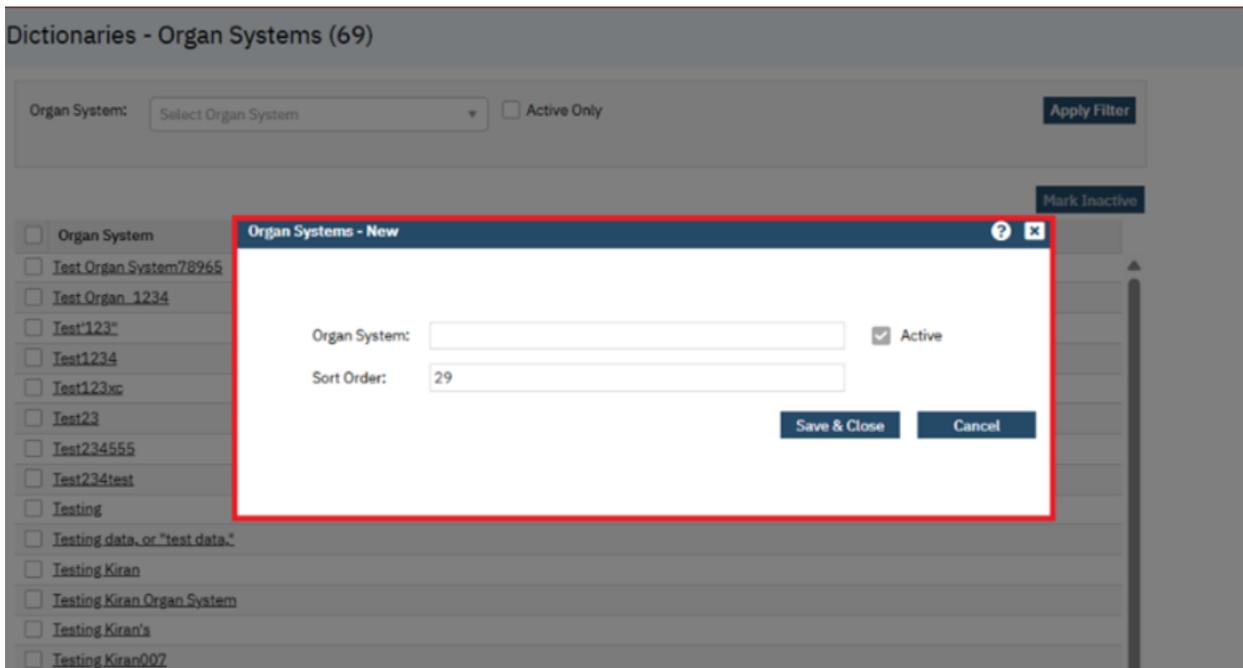
- 'Organ Systems - New' pop-up will be displayed with a blank **'Organ System:'** Textbox, which accepts up to 100 Alphanumeric and special characters.
- A **'Sort Order**:' Textbox for entering sort orders, which takes values greater than Zero (0).
- A standard red error message will be displayed if no value is entered in the 'Organ System:' Textbox and clicked on the Save & Close button.

- When the user tries to save an already existing Organ System, a red error message will be displayed as below:

Warning Message: 'This Organ System Name already exists. If you do not see the Organ System listed, please check the Inactive Organ Systems.'

- If the Sort Order entered is Zero (0), then it displays a red error message.

Warning Message: 'The Sort Order should be greater than Zero(0).'

- For the new Organ System, the Sort Order field will automatically initialize the next available consecutive number from an existing list of Organ Systems.

If the Sort Order field is left blank, clicking 'Save & Close' will consider the next consecutive number as its Sort Order.

- An 'Active' checkbox is displayed checked and disabled by default – It is used to make Organ System Active & Inactive.
1. A 'Save & Close' button is used to insert a new Organ System into the grid.
- A 'Cancel' button to close the 'Organ Systems – New' pop-up.

'Filter section':

1. 'Organ System:' multiselect dropdown displays all the Organ System values, which are listed in the grid.
1. 'Active Only' checkbox helps to filter only 'Active' Organ Systems into the grid if checked. (If unchecked, it considers all the 'Organ Systems' to display)
1. The 'Apply Filter' button is used to filter the Organ Systems based on the filter options selection.

'Organ Systems Grid' section:

- All the Organ Systems are displayed within the grid based on the 'Apply Filter' option selection.
1. 'Mark Inactive' button is displayed to make the selected 'Organ System' inactive.
- Grid header is displayed with a 'Select All' checkbox, an Organ System column name, and a Sort Order column name.
1. Organ System name is displayed with a Hyperlink and a checkbox within the grid.
- Clicking on each 'Organ System' hyperlink on the grid will open the 'Organ Systems - Edit' pop-up for modifying the Organ Systems.
1. Both Organ Systems and Sort Order can be sorted alphabetically by clicking on the individual grid column header names.

Organ System Grid will be initialized with standard master data along with its Sort Orders as below:

Organ Systems	Sort Order
Abdominal	15
Breast	13
Cardiovascular	12
Ears	6
Endocrine	22
Eyes	5

Gastrointestinal	16
General/Constitutional	1
Genitourinary	17
Head	4
HEENT	3
Hematologic	21
Immunological	20
Lymphatic/Immunological	19
Mouth/Oral	10
Musculoskeletal	14
Neck	9
Neurological	23
Nose	7
Psychiatric	24
Reproductive	18
Respiratory	11
Skin/Integumentary	2
Throat	8

'Organ Systems - Edit' pop-up:

- 'Organ Systems - Edit' pop-up will be displayed with the selected Organ System pre-filled.
- A 'Sort Order:' Textbox pre-filled with the selected Organ System's Sort Order.
- A standard red error message will be displayed if **No** value is entered in the 'Organ System:' Textbox and clicked on the Save & Close button.
- When the user tries to edit the name with an already existing Organ System, a red error message will be displayed as below:

Warning Message: 'This Organ System Name already exists. If you do not see the Organ System listed, please check the Inactive Organ Systems.'

- If the Sort Order is modified as Zero (0), on click of 'Save & Close', it displays a red error message.

Warning Message: 'The Sort Order should be greater than Zero(0).'

If the Sort Order field is left blank, clicking 'Save & Close' will consider the next consecutive number as its Sort Order.

- An 'Active' checkbox is displayed checked by default – It is used to make Organ System Active & Inactive.
- A 'Save & Close' button is used to insert a modified Organ System into the grid.
- A 'Cancel' button to close the 'Organ System – Edit' pop-up.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'Organ Systems' hyperlink – 'Dictionaries – Organ Systems' list page.

How It Helps: It allows front desk Staff and Clinicians to select from the approved standardized options while scheduling and documenting visits.

Data Model Changes: Added new tables PrimaryCareOrganSystemDictionary

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## 26. EII # 131959 (Feature # 564853): Dictionary Setup - Reason for Appointment.

Note: This is a Passive Change.

What's Changed:

As part of the Dictionary Setup initiative, implemented a dedicated **'Dictionaries - Reason for Appointment' list page**. This page can be accessed via the 'Reason for Appointment' hyperlink on the 'Dictionaries' list page.

Key Functionalities on the **'Dictionaries - Reason for Appointment' list page:**

2. Toolbar with 'New' icon for creating a new 'Reason for Appointment'.
1. Filter Section with 'Reason for Appointment' multiselect dropdown and 'Active Only' checkbox.
- 'Mark Inactive' button for inactivating the Reason for Appointment.
- Grid for showing 'Reason for Appointment'.
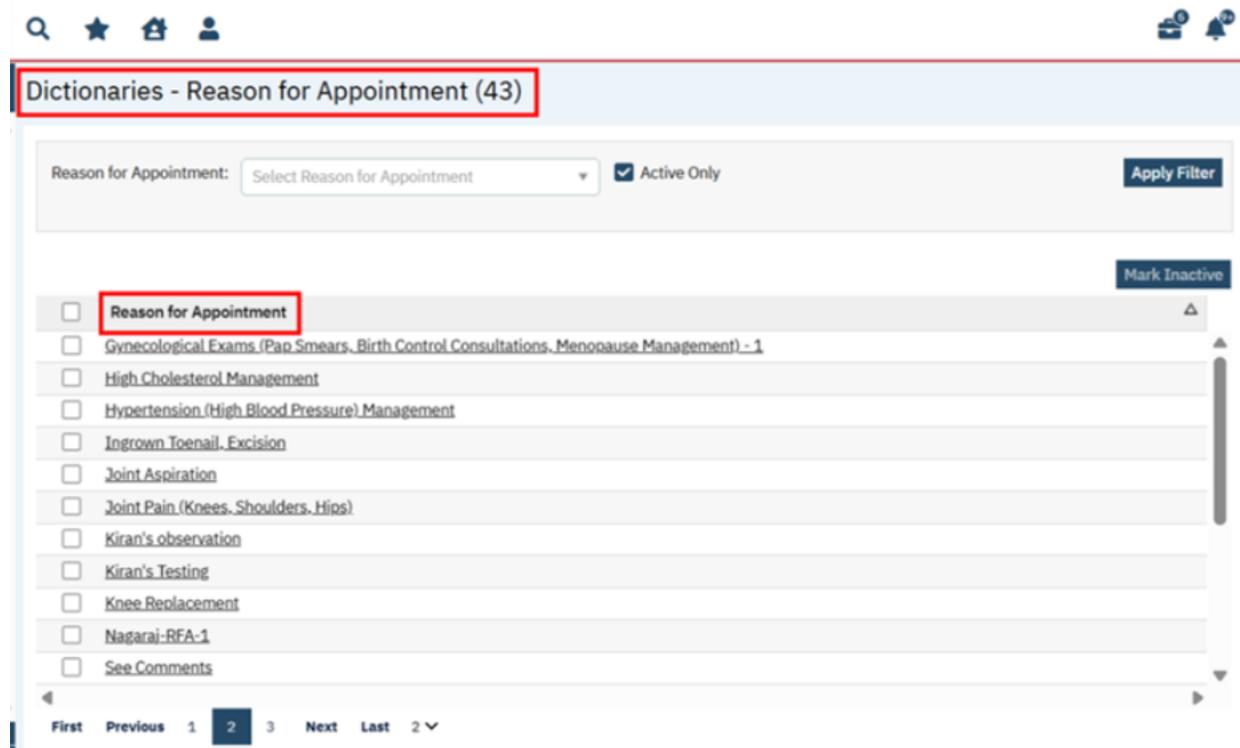
'Reason for Appointment – New' pop-up implementation:

Clicking on the 'New' button will open the 'Reason for Appointment - New' pop-up.
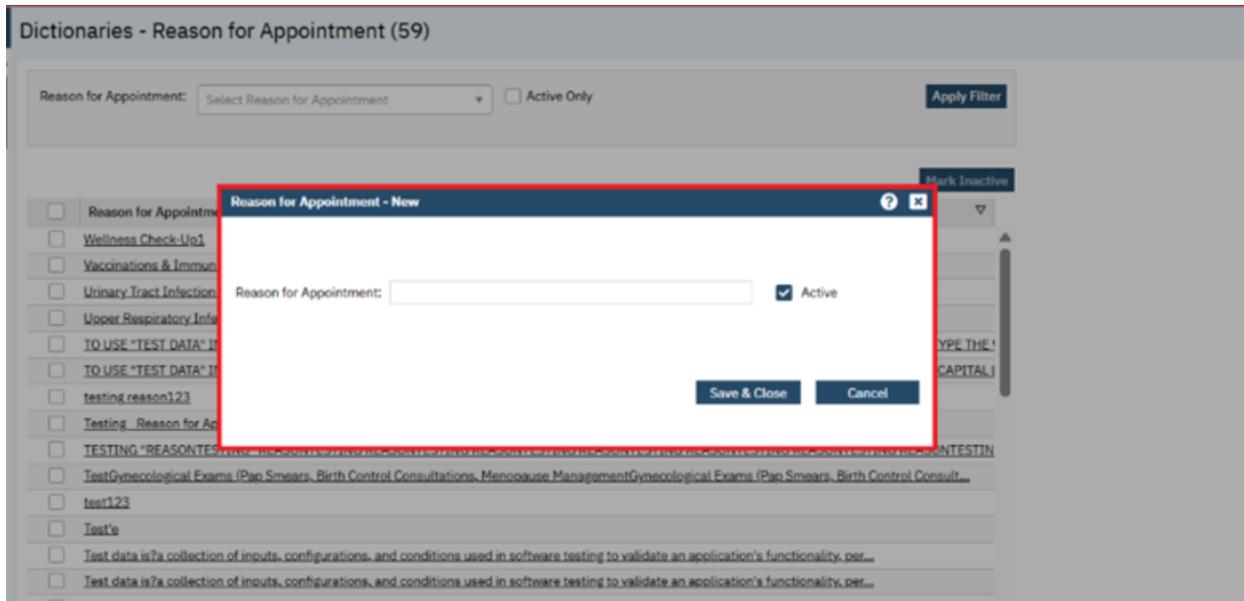
- 'Reason for Appointment - New' pop-up will be displayed with a blank '**Reason for Appointment:**' Textbox, which accepts up to 250 Alphanumeric and special characters.
- A standard red error message will be displayed if no value is entered in the **'Reason for Appointment:'** Textbox and clicked on the Save & Close button.
4. When the user tries to save an already existing Reason for Appointment, a red error message will be displayed as below:

Warning Message: 'This Reason for Appointment already exists. If you do not see the Reason for Appointment listed, please check the Inactive Reason for Appointment.'

- An 'Active' checkbox is displayed checked by default – It is used to make Reason for Appointment Active & Inactive.
- A 'Save & Close' button is used to insert a new Reason for Appointment into the grid.
- A 'Cancel' button to close the 'Reason for Appointment – New' pop-up.

'Filter section':

- **'Reason for Appointment:'** multiselect dropdown displays all the Reason for Appointment values, which are listed in the grid.
3. 'Active Only' checkbox helps to filter only 'Active' Reason for Appointments into the grid if checked. (If unchecked, it considers all the 'Reason for Appointments' to display)
- The 'Apply Filter' button is used to filter the Reason for Appointments based on the filter options selection.
:
'Reason for Appointment Grid' section:

- All the Reason for Appointments are displayed within the grid based on the 'Apply Filter' option selection.
- 'Mark Inactive' button is displayed to make the selected 'Reason for Appointment' inactive.
- Grid header is displayed with a 'Select All' checkbox and a Reason for Appointment column name.
- Reason for Appointment name is displayed with a Hyperlink and a checkbox within the grid.

2. Clicking on each 'Reason for Appointment' hyperlink on the grid will open the 'Reason for Appointment - Edit' pop-up for modifying the Reason for Appointments.

- Reason for Appointments listed in the grid can be sorted alphabetically by clicking on the grid column header name.

Reason for Appointments Grid will be initialized with standard master data as below:

Reason for Appointment
Annual Physical Exam
Arthritis Management
Asthma Management
Back Pain
Blood Pressure Screening
Cholesterol Screening
Chronic Obstructive Pulmonary Disease (COPD) Management
Depression
Diabetes Screening/Management
Gastroenteritis
Gastrointestinal Issues (Acid Reflux, Irritable Bowel Syndrome, Constipation, Diarrhea)
Gynecological Exams (Pap Smears, Birth Control Consultations, Menopause Management)
High Cholesterol Management
Hypertension (High Blood Pressure) Management
Joint Pain (Knees, Shoulders, Hips)
See Comments
Skin Conditions (Rashes, Acne, Eczema, Psoriasis)
Sore Throat (Pharyngitis, Strep Throat)
Stress Management
Upper Respiratory Infection (Cold, Flu)
Urinary Tract Infection (UTI)
Vaccinations & Immunizations
Wellness Check-Up

'Reason for Appointment - Edit' pop-up:

- 'Reason for Appointment - Edit' pop-up will be displayed with the selected Reason for Appointment pre-filled.
- When the user tries to edit the name with an already existing Reason for Appointment, a red error message will be displayed as below:
-

Warning Message: 'This Reason for Appointment already exists. If you do not see the Reason for Appointment listed, please check the Inactive Reason for Appointments.'

- An 'Active' checkbox is displayed checked if the selected Reason for Appointment is 'Active' and unchecked if it is an inactive one.
- A 'Save & Close' button is used to insert a modified Reason for Appointment into the grid.

- A 'Cancel' button to close the 'Reason for Appointment – Edit' pop-up.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'Reason for Appointment' hyperlink – 'Dictionaries – Reason for Appointment' list page.

How It Helps:

It allows front desk Staff and Clinicians to select from the approved standardized options while scheduling and documenting visits.

Data Model Changes: Added new table PrimaryCareReasonForAppointmentDictionary

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27. EII # 131960 (Feature # 564854): Dictionary Setup – N & S Review of Systems.

Note: This is a Passive Change.

What's Changed:

As part of the Dictionary Setup initiative, we have implemented a dedicated **'Dictionaries – N & S Review of Systems' list page**. This page can be accessed via the 'N & S Review of Systems' hyperlink on the 'Dictionaries' list page.

Key Functionalities on the 'Dictionaries - Review of Systems' list page:

- Filter Section with 'N & S Review of Systems:' multiselect dropdown and 'Active Only' checkbox.
- 'Mark Inactive' button for inactivating the N & S Review of Systems.
- Grid for showing a list of 'N & S Review of Systems'.
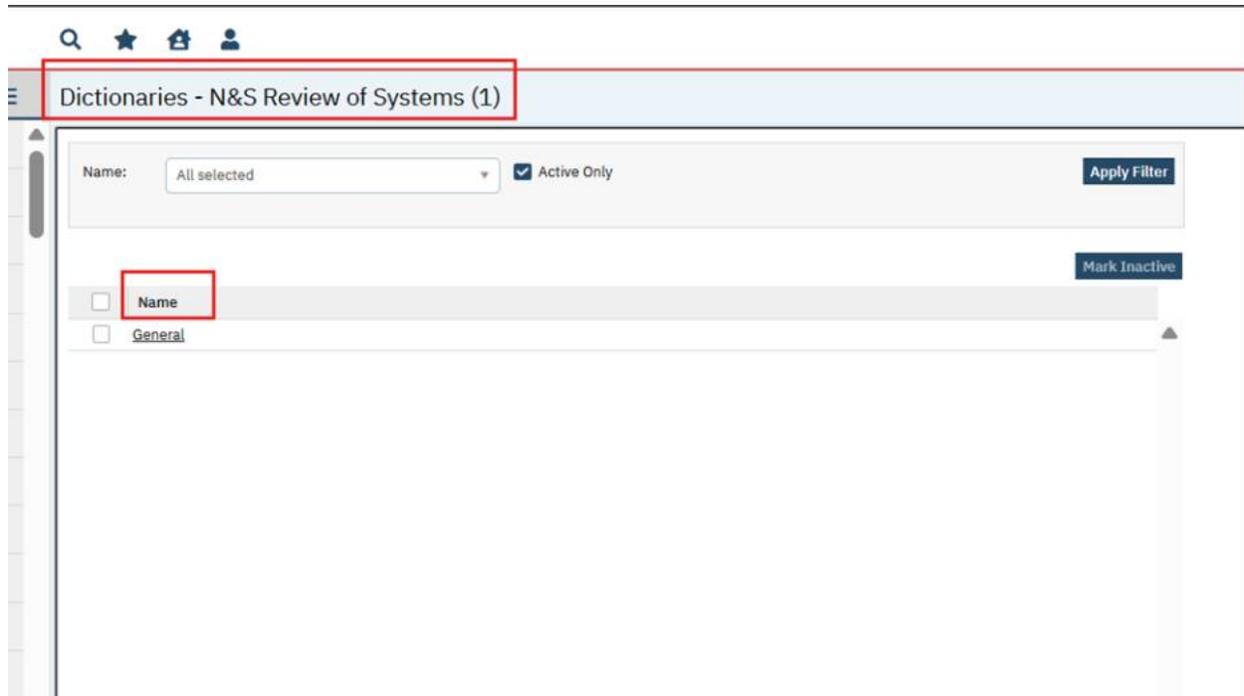
'*Filter section' implementation:*'

- Filter section with 'N & S Review of System:' multiselect dropdown displays all the N & S Review of System values, which are listed in the grid.
- 'Active Only' checkbox helps to filter only 'Active' N & S Review of Systems into the grid if checked. (If unchecked, it considers all the 'N & S Review of Systems' to display)
- The 'Apply Filter' button is used to filter the N & S Review of Systems based on the filter options selection.

'N & S Review of Systems Grid' implementation:

- All the N & S Review of Systems are displayed within the grid based on the 'Apply Filter' option selection.
- 'Mark Inactive' button is displayed to make the selected 'N & S Review of System' inactive.
- Grid header is displayed with a 'Select All' checkbox, a 'Name' column name.
- N & S Review of System name is displayed with a Hyperlink and a checkbox within the grid.
- Clicking on each 'N & S Review of Systems' hyperlink on the grid will open the 'N & S Review of Systems - Edit' pop-up for selecting the Review of Systems.

'N & S Review of Systems - Edit' pop-up implementation:
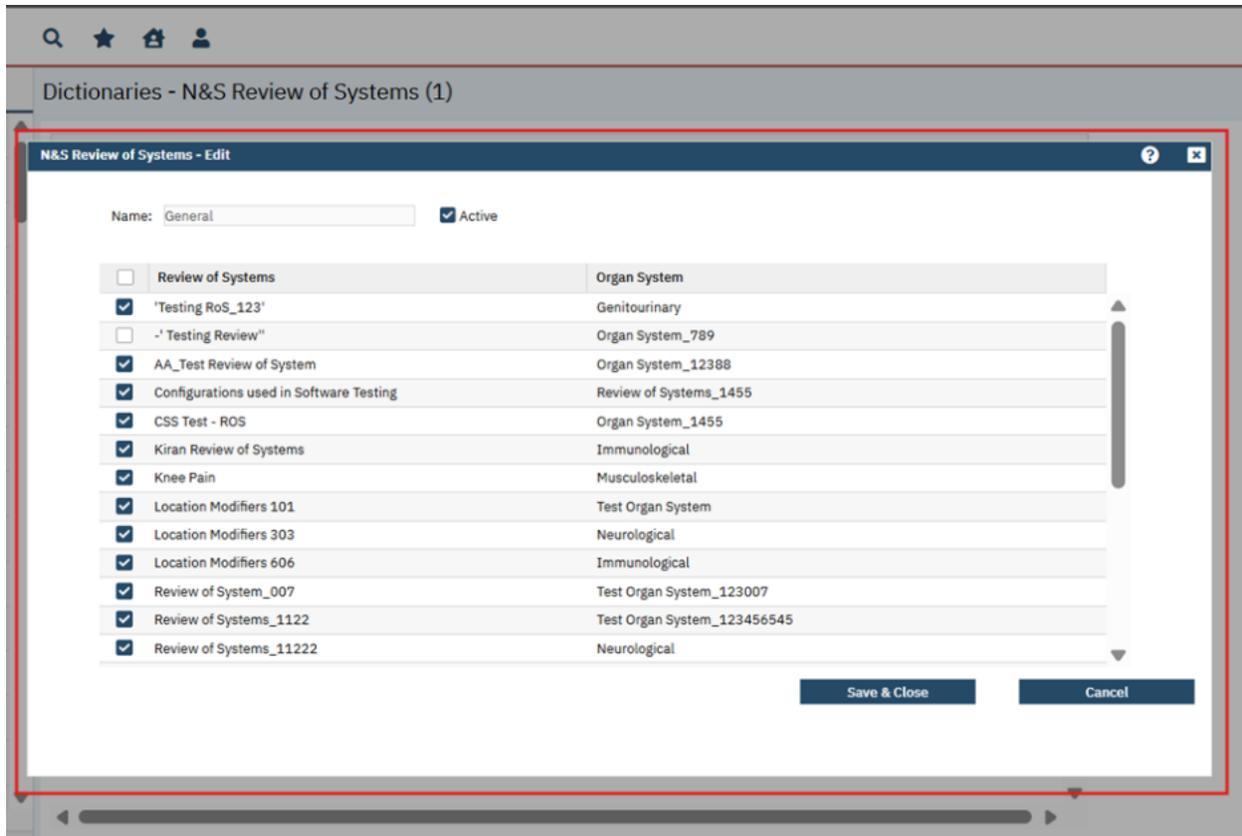
3. 'N & S Review of Systems - Edit' pop-up will be displayed with the selected N & S Review of System pre-filled and disabled by default.
4. An 'Active' checkbox is displayed checked if the selected Review for System is 'Active' and unchecked if it is an inactive one.
5. A 'Save & Close' button is used to select a Review for System into respective N & S Review of System.
6. A 'Cancel' button to close the 'N & S Review for Systems – Edit' pop-up.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'N & S Review of Systems' hyperlink – 'Dictionaries – N & S Review of Systems' list page.

How It Helps:

It helps to deactivate specific values without deleting them, ensuring they no longer appear for end users but can be reactivated if needed.

Data Model Changes: Added new table PrimaryCareNAndSReviewOfSystemsDictionary

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28. EII # 132099 (Feature # 571224): Dictionary Setup - Dictionary List Page.

Note: This is a Passive Change.

What's Changed:

A new 'Dictionaries' list page is implemented, which contains six predefined dictionaries that support structured documentation in the 'Medical Note' for Primary Care.
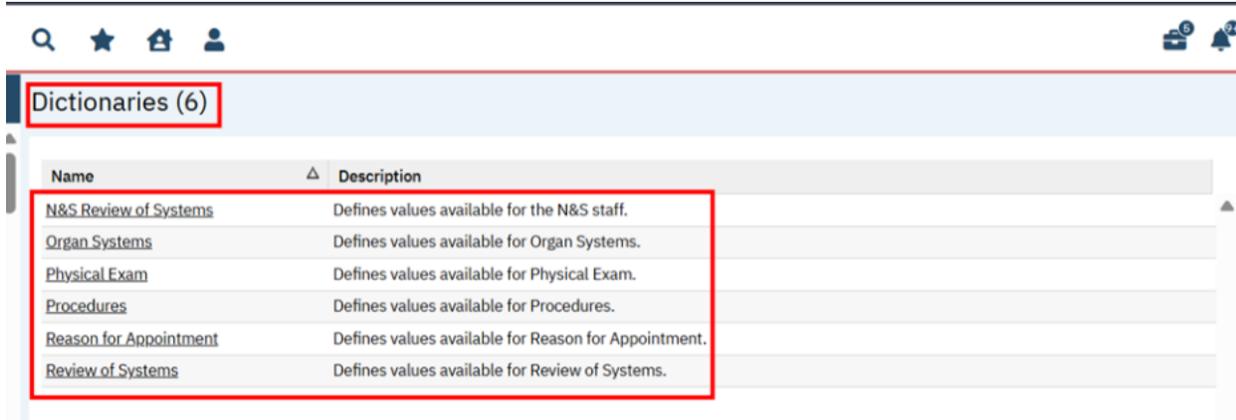
Predefined Dictionaries & their Description:

4. **Procedures** - Defines values available for Procedures.
5. **Reason for Appointment** - Defines values available for Reason for Appointment.
6. **Organ Systems** - Defines values available for Organ Systems.
7. **Review of Systems** - Defines values available for Review of Systems.
8. **N&S Review of Systems** - Defines values available for the N&S staff.
9. **Physical Exam** - Defines values available for Physical Exam.

Clicking on any Dictionary hyperlink on the 'Dictionaries' list page will navigate to its list page.

The data from these dictionaries will be directly used in the new 'Medical Note' interface, allowing users to select from predefined values during documentation. This ensures uniformity and reduces variability in clinical records.

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page.

How It Helps:

- Consistency in clinical documentation across providers and visits.
- Improved data quality for reporting and analytics.
- Streamlined workflows for clinicians and support staff.
- Enhanced usability of the Medical Note through structured data entry.

Data Model Change: Added new table PrimaryCareDictionary

29. EII # 129945 (Feature # 489494): Dictionary Setup - Physical Exam.

Note: This is a Passive Change.

What's Changed:

As part of the Dictionary Setup initiative, a dedicated **'Dictionaries – Physical Exam' list page is** implemented. This page can be accessed via the 'Physical Exam' hyperlink on the 'Dictionaries' list page.

Key Functionalities on the 'Dictionaries - Physical Exam' list page:

1. Toolbar with 'New' icon for creating a new 'Physical Exam'.
2. Filter Section with 'Physical Exam:' multiselect dropdown and 'Active Only' checkbox.
3. 'Mark Inactive' button for inactivating the Physical Exam.
4. Grid for showing a list of 'Physical Exam'.
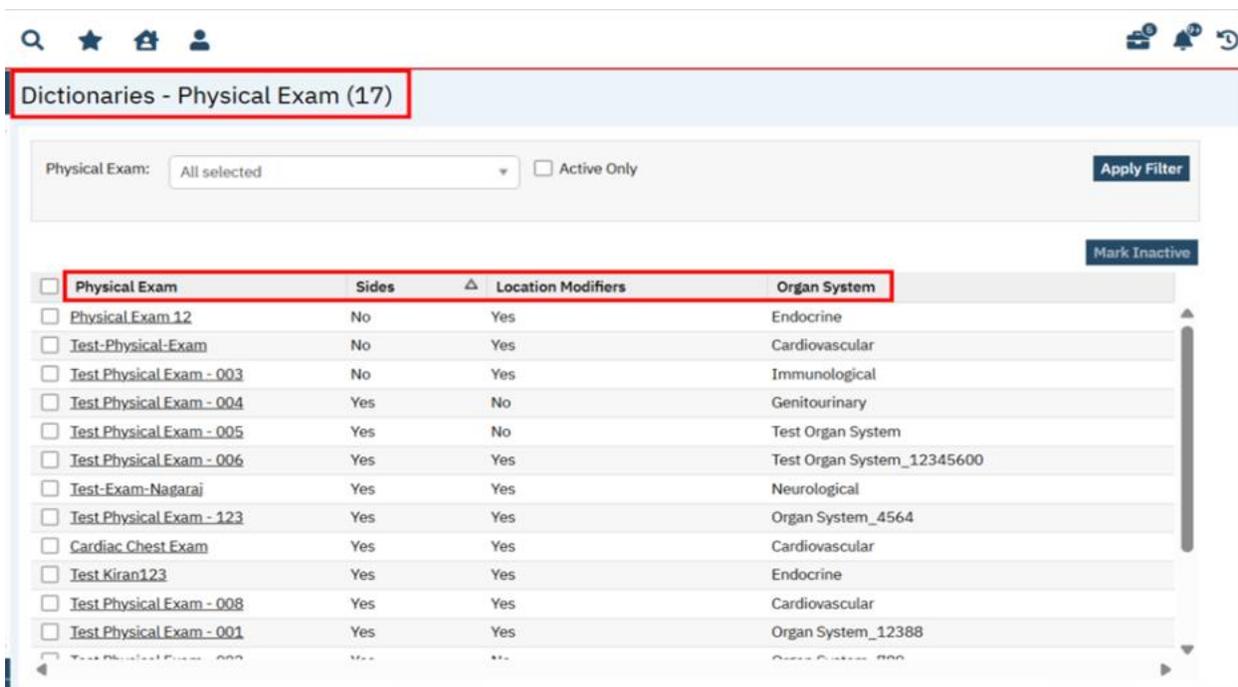
'Filter section' implementation:

- Filter section with 'Physical Exam:' multiselect dropdown displays all the Physical Exam values, which are listed in the grid.
- 'Active Only' checkbox helps to filter only 'Active' Physical Exam into the grid if checked. (If unchecked, it considers all the 'Physical Exam' to display)
- The 'Apply Filter' button is used to filter the Physical Exam based on the filter options selection.

'Physical Exam Grid' implementation:

- All the Physical Exam are displayed within the grid based on the 'Apply Filter' option selection.
- 'Mark Inactive' button is displayed to make the selected 'Physical Exam' inactive.
- Grid header is displayed with a 'Select All' checkbox, a 'Physical Exam' column name, Sides (Yes/No), Location Modifiers (Yes/No) and an 'Organ System' column name.

- Physical Exam name is displayed with a Hyperlink and a checkbox within the grid.
- Clicking on each 'Physical Exam' hyperlink on the grid will open the 'Physical Exam - Edit' pop-up for modifying the Physical Exam.
- Associated Sides (Yes/No), Location Modifiers (Yes/No) and an 'Organ System' (read only) are displayed against each Physical Exam under respective columns.
- All the column values can be sorted alphabetically by clicking on the individual grid column header names.

Clicking on the 'New' button will open up the 'Physical Exam - New' pop-up.

'*Physical Exam – New' pop-up implementation:*
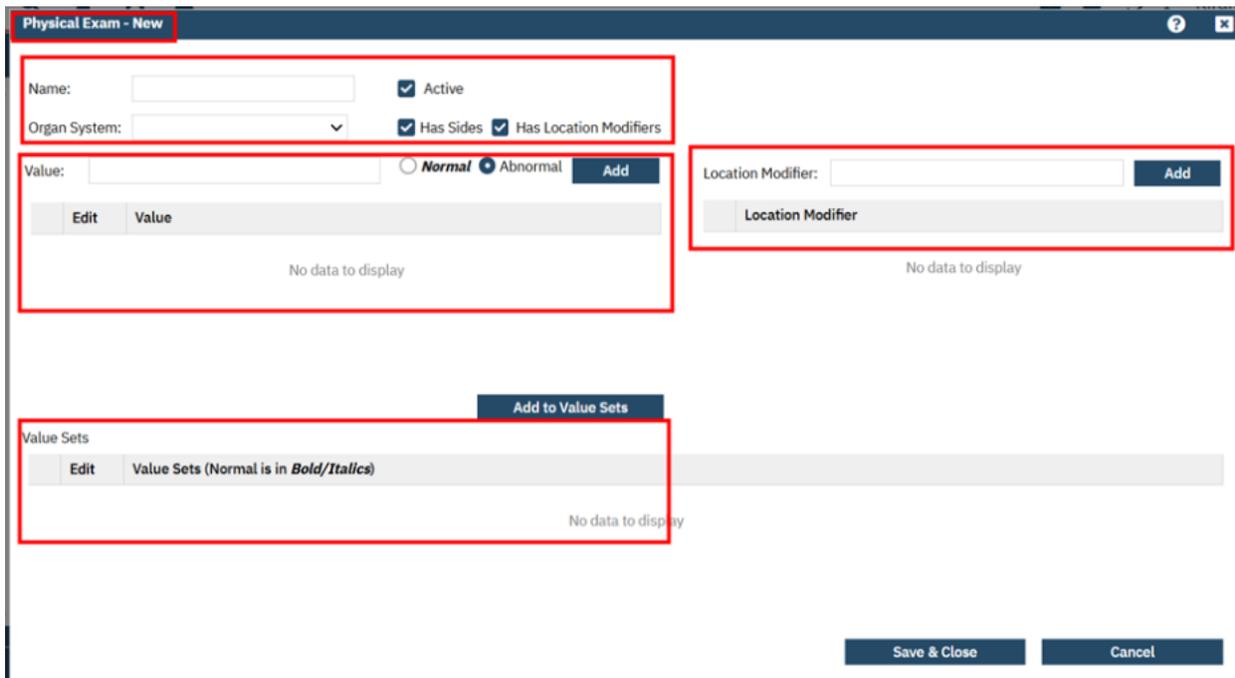
- 'Physical Exam - New' pop-up will be displayed with a blank 'Name:' Textbox, which takes up to 250 Alphanumeric and special characters.
- An 'Organ System:' dropdown that displays only active values from the 'Organ Systems' dictionary.
- A standard red error message will be displayed if **No** value is entered in the 'Name:' Textbox and clicked on the Save & Close button.
- When the user tries to save an already existing Physical Exam name, a red error message will be displayed as below:
  Warning Message: *'This Physical Exam Name already exists. If you do not see the Review of System listed, please check the Inactive Physical Exam.'*

- A standard red error message will be displayed if **No** value is selected in the 'Organ System:' dropdown and clicked on the Save & Close button.
  Warning Message: *'Organ System is required.'*

- An 'Active' checkbox is displayed checked by default – It is used to make Physical Exam Active & Inactive.
- A 'Has Sides' checkbox is displayed checked by default.
- A 'Has Location Modifiers' checkbox is displayed checked by default.

'Value' section implementation within the 'Physical Exam - New' pop-up.

- Value' section is implemented with a 'Value:' Textbox, which takes up to 250 characters, and it allows special characters.
- When the user tries to add an already existing Value name, a red error message will be displayed as below:

  Warning Message: *'This Value already exists. You cannot add the same Value in the same Value Set.'*

- **Normal** and Abnormal radio button, by default Abnormal is checked.
- An 'Add' button which inserts input 'Value' name to the 'Value' grid below.
- A 'Value' grid is displayed with Edit & Value column headers.
- Value Name is displayed along with a 'X' delete icon and an Edit radio button within the grid.
- 'Normal' values are always displayed in '***Bold & Italicized*'** in the top row of Value grid.
- Selection of an edit radio button will pull the Value text into the 'Value:' field, selects the radio button based on whether the value is Normal/Abnormal, and the 'Add' button label will be turned into 'Modify'.
- Clicking on 'Modify' button again inserts the modified Value to the Value grid.
- When user attempts to click 'Add / Modify' for a Value that has the 'Normal' radio button selected and there is already a Value listed in the Value grid that is set as 'Normal', then a validation message is displayed as below:
  Warning Message: *'There can only be one Normal Value for each Value Set. Please determine which Value is Normal and ensure the other Value(s) are marked as Abnormal.'*

- Clicking on 'X' deletion icon will ask the user confirmation for deleting the Value from the 'Value' grid. On confirmation, selected Value will be removed from the grid.
- An 'Add to Value Set' button is placed below the 'Value' grid for pushing the current set of Value grid items to the 'Value Set' grid.

  Note: *The user must have values in the 'Value' Grid to use this button. It will not allow for blank values to be inserted into the 'Value Sets' Grid.*

'Value Sets' section implementation within the 'Physical Exam - New' pop-up.

- A 'Value Sets' grid is displayed with Edit & Value Sets (**Normal** is in ***Bold/Italics***) column headers.
- Value Set Name is displayed along with a 'X' delete icon and an Edit radio button within the Value Set grid.
- 'Normal' values are always displayed in '***Bold & Italicized*'** in the top row of Value grid.

- Selection of an edit radio button will pull the Value Set back into the 'Value' grid, and the 'Add to Value Set' button label will be turned into 'Modify Value Sets'.
- Clicking on 'Modify Value Sets' button again inserts the modified 'Value Sets' to the Value Set grid.

Note: *The Normal value will be listed first as the value in the most left of the Value Set.*

Ex: *Value Se1*, Value Set 2, Value Set 3, Value Set4.

- Clicking on 'X' deletion icon will ask the user confirmation for deleting the Value Set from the 'Value Set' grid. On confirmation, selected Value Set will be removed from the grid.

'Location Modifier' section implementation within the 'Physical Exam - New' pop-up.

- A textbox is displayed along with an 'Add' button to insert the 'Location Modifiers' into the grid below.
- 'Add' button will only be enabled if the 'Has Location Modifiers' checkbox is checked.
- Clicking on enabled 'Add' button will insert the Location Modifier to the grid below.
- Clicking on enabled 'Add' button without any text in the textbox will throw 'Location Modifier is required' red error warning message.
- Location Modifiers grid will display the inserted 'Location Modifiers along with a 'X' delete icon.
- Clicking on 'X' deletion icon will ask the user confirmation for deleting the Location Modifier from the grid. On confirmation, selected Location Modifier will be removed from the grid.
    - A 'Save & Close' button is used to insert a new Physical Exam into the grid.
    - A 'Cancel' button to close the 'Physical Exam – New' pop-up.

'Physical Exam *- Edit' pop-up implementation:*

- 'Physical Exam - Edit' pop-up will be displayed with the selected Physical Name pre-filled.
- An 'Organ System:' dropdown will be pre-filled with an associated 'Organ System' with the selected Physical Exam.
- A standard red error message will be displayed if **No** value is entered in the 'Name:' Textbox and clicked on the Save & Close button.
- When the user tries to edit the name with an already existing Physical Exam, a red error message will be displayed as below:

Warning Message: *'This Physical Exam Name already exists. If you do not see the Review of System listed, please check the Inactive Physical Exam.'*

- A standard red error message will be displayed if no value is selected in the 'Organ System:' dropdown and clicked on the Save & Close button.

Warning Message: *'Organ System is required.'*

- A 'Has Sides' checkbox is displayed checked/unchecked based on the selection when it was saved.

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- An 'Active' checkbox is displayed checked if the selected Physical Exam is 'Active' and unchecked if it is an inactive one.
- A 'Save & Close' button is used to insert a modified Physical Exam into the grid.
- A 'Cancel' button to close the 'Physical Exam – Edit' pop-up.

Note: *Modification of Value, Value Sets and Location Modifiers within the 'Physical Exam – Edit' pop-up is explained in the 'Physical Exam – New' pop-up implementation section above.*

Where to Find It:

Path: SmartCare Application – Search for 'Dictionaries (Administration)' – Dictionaries list page – Click on 'Physical Exam' hyperlink – 'Dictionaries – Physical Exam' list page.

How It Helps:

It helps to configure complex value sets for Physical Exam findings, so that clinicians can document exams using standardized structured data.

Data Model Changes: Added the below new tables
PrimaryCarePhysicalExamDictionary
PhysicalExamLocationModifiers,
PhysicalExamValueSets,
PhysicalExamValues

Document Codes

Reference No	Task No	Description
30	EII # 132291	Changes are implemented to categorize documents using the 'Document Category' field and allow users to filter and view only the documents relevant to their team or program.

30. EII # 132291 (Feature # 586503): Changes are implemented to categorize documents using the 'Document Category' field and allow users to filter and view only the documents relevant to their team or program.

Note: This is a Passive Change.

What's Changed:

SmartCare now supports associating a document with one or more document categories, enabling users from different departments, treatment teams, or programs to filter and access only the documents relevant to their specific needs.

Global Code Category Details:

Category Code: DocumentsCategory
Category Name: Documents Category.
Active: Yes
Allowed to Add/Modify/Delete codes: Yes
Allowed to modify code names: Yes
Allowed to modify sort order: Yes
Has Subcodes: No
Description: Global Codes in this list will be used to define different categories for the Documents.

Global Code Category Integration:

- A new Global Code category 'DocumentsCategory' has been introduced.
- Document Categories are added into this Global code Category "DocumentsCategory".
- This category is now linked to both the multi-select dropdown in the 'Document Codes Detail' page and the single-select filter in the 'Documents' List page.
- The system now dynamically links documents to Global Code categories based on selections in the 'Document Category' dropdown, ensuring accurate and relevant filtering in the Documents List view.

'**Document Codes Detail' page enhancement:**

- A new multi-select dropdown 'Document Category' has been introduced.
- This Dropdown is linked to the Global Code category "DocumentsCategory".
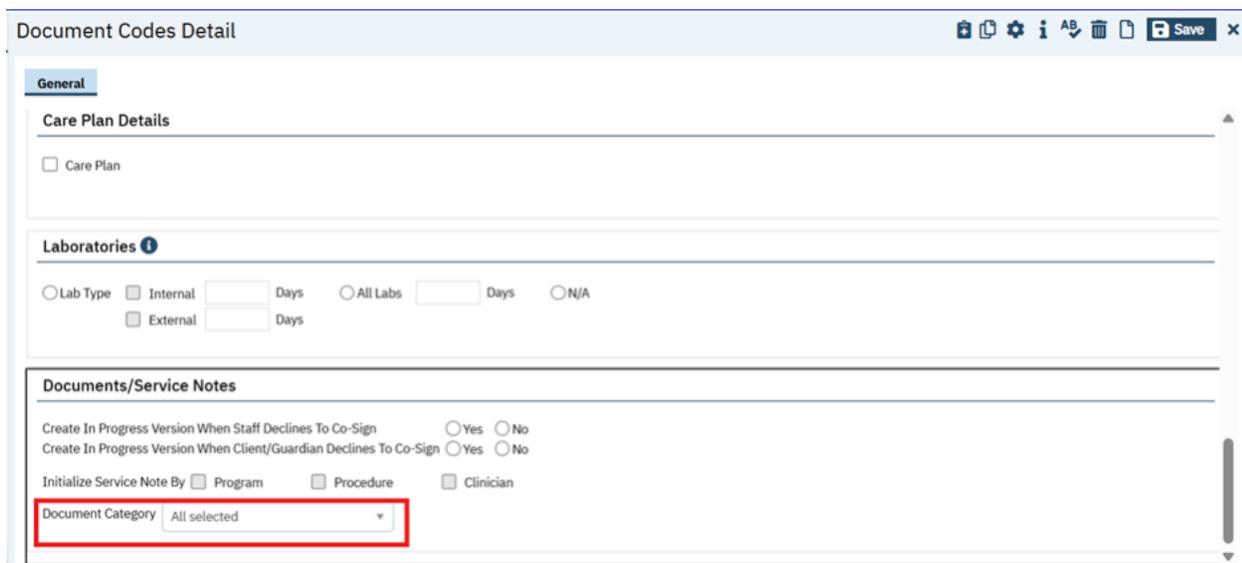
'Documents' List Page Enhancement:

- Added a new "All Document Categories" single-select dropdown filter.
- This Dorp down is linked to the Global Code category "DocumentsCategory".
- Users can select only one value in this dropdown. When a value is selected, the system lists documents in the grid which is linked to this category in the 'Document Codes Detail' page.
- When users select "All Document Categories," the system displays all documents as before.

- If "All Document Categories" is selected, the system displays documents that are not linked to any category along with other documents.
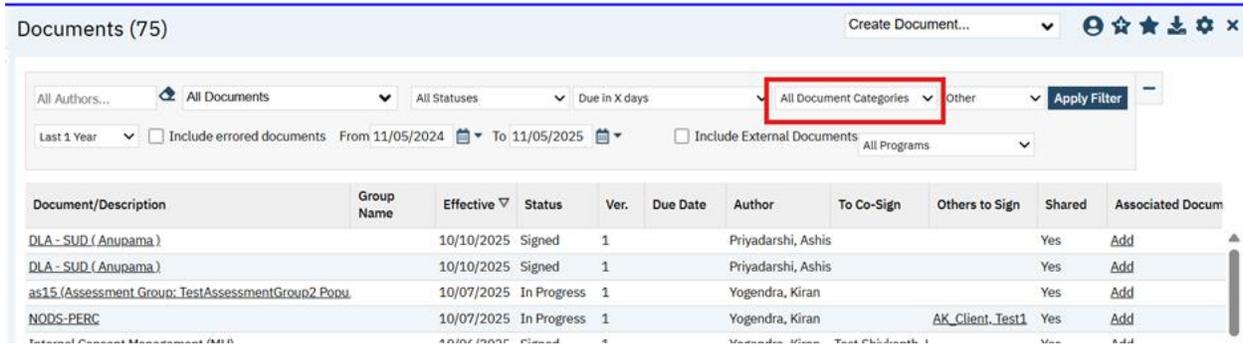
Where To Find It:

Path 1: Administration -- Global Codes -- 'Global Codes' list page -- search and select 'DocumentsCategory' – 'Global Code Details' screen.

Path 2: Administration -- 'Document Codes' -- New -- 'Document Codes Detail'.

Path 3: Client' -- 'Documents' -- 'Documents' list page.

How It helps:

- Different treatment teams and programs often use different sets of documents. To support this, users can categorize documents using the 'Document Category' field, allowing them to filter and view only the documents relevant to their team or program.

Data Model Change:

- New column: DocumentCategory is added to **'DocumentCodes' table**

Documents

Reference No	Task No	Description
~~31~~	~~EII # 130726~~	~~The 'Self-preservation Status' field is converted from checkbox to dropdown field in the 'Residential Self – Preservation Assessment' document.~~
32	EII # 131030	CDAG Program Dropdown in 'My Documents' and 'Caseload Reassignment' screen.
33	EII # 131712	Changes are implemented in the 'USCDI Summary of Care' document to limit the data pull to include CDAG related data.
~~34~~	~~EII # 131720~~	~~Added New checkboxes for 'Modified Simple Screening Instrument for Substance Abuse (MSSI-SA)' Document.~~
35	EII # 132345	Core documents and Service Notes to display watermark option when in 'in progress' status.

~~31. EII # 130726 (Feature # 531285): The 'Self-preservation Status' field is converted from checkbox to dropdown field in the 'Residential Self – Preservation Assessment' document.~~

~~◻ ACTIVE CHANGE~~

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

~~**What's Changed:**~~

~~With this update, the 'Self-Preservation Status' field is converted into dropdown field with the below mentioned values.~~

- ~~Capable of independent self-preservation (unimpaired)~~
- ~~Capable of self-preservation with verbal instruction (partially impaired)~~
- ~~Capable of self-preservation with physical instruction (impaired)~~
- ~~Not capable of self-preservation at this time.~~

~~**Global Code Details:**~~

- ~~A new global code category 'SELFPRESERVSTATUS' is implemented which drives 'Self-preservation Status' dropdown field in 'Residential Self-Preservation Assessment' document. And this global code category is unlocked by default.~~
- ~~This field will not be initialized to any value. Also, it is not a mandatory field.~~
- ~~If users access existing 'In Progress' or edit the existing 'Signed' 'Residential Self – Preservation Assessment' document, then 'Self-Preservation Status' dropdown field will default to NULL.~~

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

~~**Path 1:** 'Client' -- 'Residential Self-Preservation Assessment' document -- 'Self-Preservation Status' field~~

~~**Path 2:** Administration -- 'Global Codes' -- 'Global Codes' list page -- Search and select 'SELFPRESERVSTATUS' -- 'Global Code Details' screen~~

~~**How It Helps:**~~

- ~~Converts the 'Self-preservation Status' field from checkbox to dropdown field. To allow users to only select one response.~~

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

- ~~'DocumentResidentialSelfPreservationAssessments' table.~~
- ~~New Column: 'SelfPreservationStatus'~~

32. EII # 131030 (Feature # 546205): CDAG Program Dropdown in 'My Documents' and 'Caseload Reassignment' screen.

Note 1: This is a Passive change.

Note 2: This functionality is implemented for a specific customer. If you have Primary and County types of setup and would like to use these functionalities, please get in touch with Streamline Support.

What's Changed:

With this release,

- In 'My Documents' screen, programs will display based on the selected CDAG group programs in 'All Programs' drop-down regardless of program is enrolled or discharged and dependency for staff programs in 'Staff/user details' screen is removed.

- In the 'Caseload Reassignment' screen, programs will be displayed based on the selected CDAG group programs in the 'All Programs' dropdown, regardless of whether the program is enrolled or discharged. The dependency on staff programs in the 'Staff/User Details' screen has been removed.

Prerequisite: CDAG setup as below:

1. System configuration key "DisplayCDAGSectionInStaffDetails" value is set to 'Yes'.

2. System configuration key 'EnableClinicalDataAccessGrouping' value is set to 'Yes'.

Where To Find It:

Path 1: Go Search – My Office - My Documents – 'All Programs' drop down.

Path 2: Go Search – My Office - Caseload Reassignment – Reassignment List page -- Select Assignment Type dropdown value --- Select value from 'All Programs' drop down -- Click on Apply filter.

How this helps:

The purpose of this change is displaying the programs based on the CDAG groups. Dependency of staff program is removed and display the programs regardless of program enrolled or discharged.

33. EII # 131712 (Feature # 311821): Changes are implemented in the 'USCDI Summary of Care' document to limit the data pull to include CDAG related data.

Note 1: This is a Passive Change.

Note 2: This functionality is implemented for a specific customer. If you have Primary and County types of setup and would like to use these functionalities, please get in touch with Streamline Support.

What's Changed:
SmartCare now supports CDAG logic in the 'USCDI Summary of Care' document, limiting the data pull to include only CDAG-related data.

- When the logged-in user is assigned to a CDAG, the system pulls only data associated with the user's assigned CDAG. Additionally, it includes non-CDAG-tagged data such as Allergies and Medications.

- If the user is not assigned to a CDAG, the system pulls all patient data.

- If the user is a patient, the system pulls all patient data.

- If CDAG is not enabled in the system, the system pulls all patient data.

- The PDF of the 'USCDI Summary of Care' document and the associated CCDA files include only data associated with the selected CDAG.

Prerequisite: CDAG is setup as below:

- Set Configuration key DisplayCDAGSectionInStaffDetails value to **Yes.**
- Set Configuration key EnableClinicalDataAccessGrouping value to **Yes.**

Where To Find It:

Path: Go Search -- Select 'Client' -- 'USCDI Summary of Care' document.

How It Help's:

- Ensures pulled data matches with the user's CDAG assignment.
- Improves data governance and interoperability.

34. EII # 131720 (Feature # 555252): Added New checkboxes for 'Modified Simple Screening Instrument for Substance Abuse (MSSI-SA)' Document.

Note: This is a Passive Change.

~~**What's Changed:**~~

~~With this update, the existing checkboxes text data is modified and new checkboxes are updated for field '5. Have you had any health problems? Please check if you have', in the 'Modified Simple Screening Instrument for Substance Abuse (MSSI-SA)' Document.~~

- ~~Had blackouts or other periods of memory loss?~~
- ~~Injured your head after drinking or using drugs?~~
- ~~Had convulsions, delirium tremens ("DTs")?~~
- ~~Had hepatitis or other liver problems?~~
- ~~Felt sick, shaky, or depressed when you stopped?~~
- ~~Felt "coke bugs" or a crawling feeling under the skin after you stopped using drugs?~~
- ~~Been injured after drinking or using?~~
- ~~Used needles to shoot drugs?~~
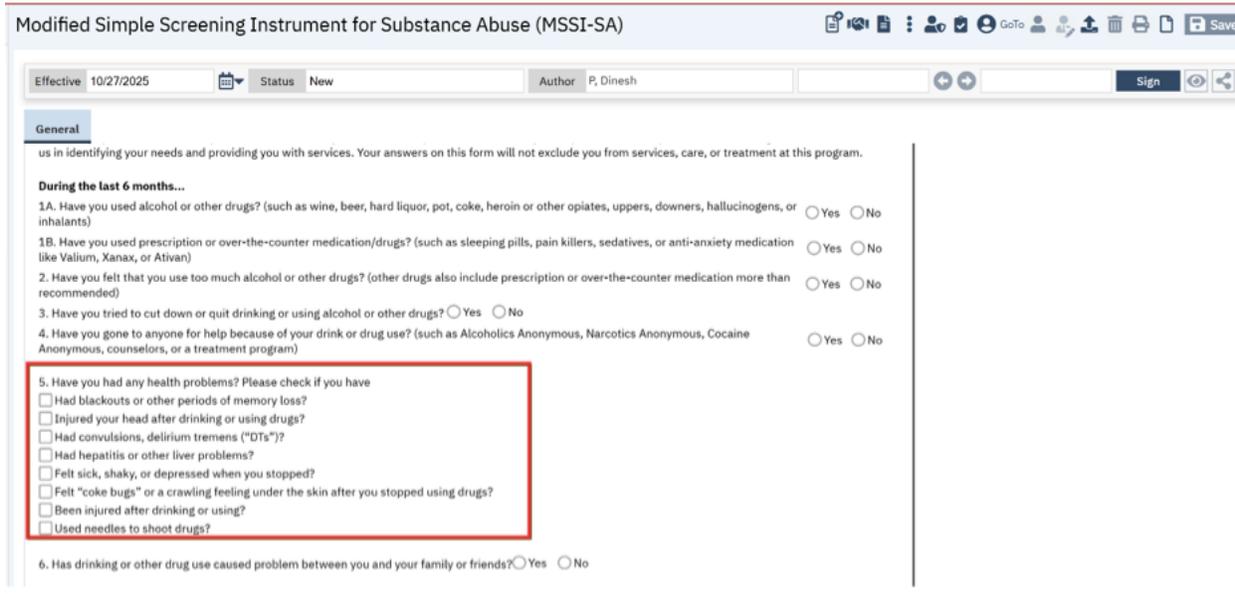
~~**Where To Find It:**~~

~~**Path:** Client -- 'Modified Simple Screening Instrument for Substance Abuse (MSSI-SA)' Document -- 'General' tab -- 'Screening' section -- '5. Have you had any health problems? Please check if you have' field.~~

~~**How It Helps:**~~

~~Modified Simple Screening Instrument for Substance Abuse (MSSI-SA) Core document is updated as per the Copyrighted document.~~

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

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~~**New Columns:** 'HadBlackoutMemoryLoss', 'InjuredHeadAfterDrinking', 'HadConvulsionsDeliriumTremens', 'HadHepatitisLiverProblems', and 'UsedNeedlesToShootDrugs' are added to **'DocumentMSSISAScreenings' table.**~~

35. EII # 132345 (Feature # 589033): Core documents and Service Notes to display watermark option when in 'in progress' status.

Note: This is a Passive Change.

What's Changed:

With this release, for all the Core Documents and Service Notes which are in "In-progress" status, PDF of these documents and Service Notes will have Draft watermark as configured in the system configuration key.
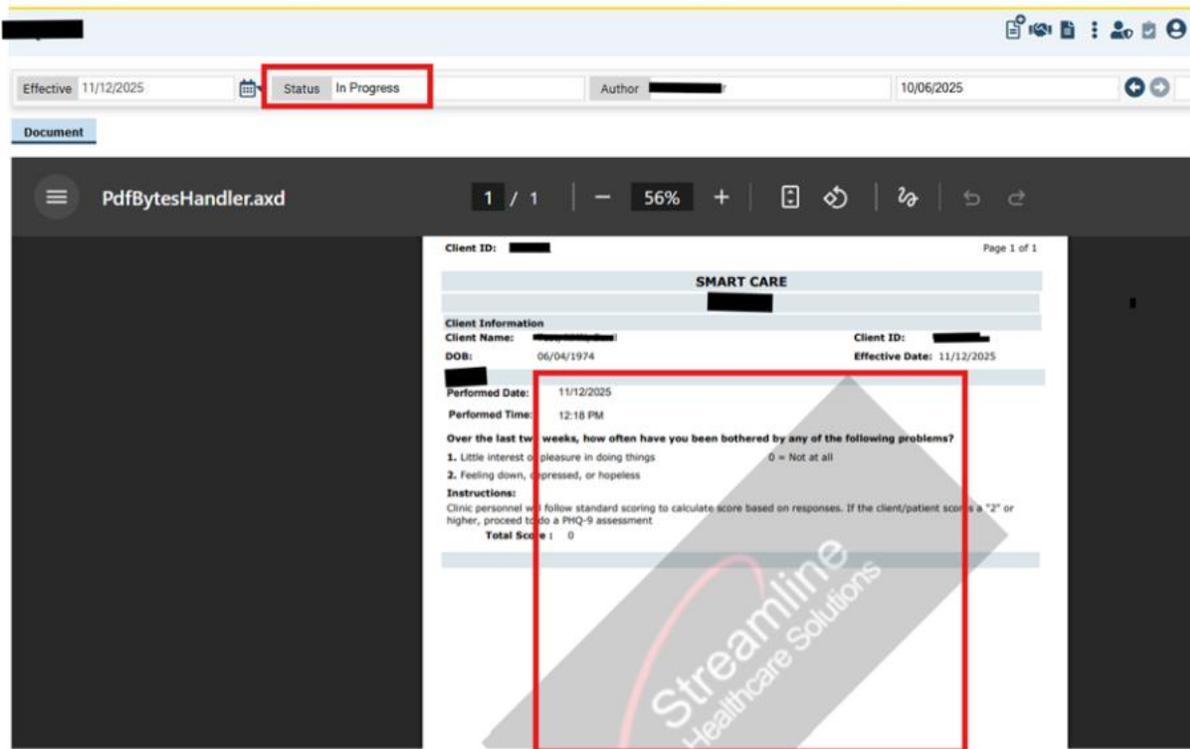
Configuration Keys Modified:

1) System Configuration key Details: DocumentsInProgressShowWatermark

Read Key as: Documents InProgress Show Watermark.

Allowed Values: Y, N.

Default Value: Null

Modules: NA

Description:

This is a new feature being added to the core product by introducing a system configuration key to have Draft watermark shown in the PDF of all the Documents/Service Notes which are in "In-Progress" status.

If the configuration key is set to "N", Watermark will Not be displayed in the PDF of the Documents/Service Notes that are in "In-progress" status. **This will be the default value of the key as it drives the existing behavior.**

If the configuration key is set to "Y", Watermark will be displayed in the PDF of the Documents/Service Notes that are in "In-progress" status.

Note:

If by chance the value of the key is updated with any value apart from the allowed values, the system **will consider the default behavior, i.e. same as the value "N"**

2) System Configuration key Details: DocumentsInProgressWatermarkImageLocation

Read Key as: Documents InProgress Show Watermark Image Location.

Allowed Values: Image Location

Default Value: Null

Modules: NA

Description:

This is a new feature being added to the core product by introducing a system configuration key to provide the location of the Image of the Watermark that will be displayed in the PDF of the Documents/Service Notes when the system configuration Key - DocumentsInProgressShowWatermark = Y.

If the configuration key is set to "None" or is blank, then the Watermark will not be displayed in the PDF.

If the configuration key is set to a valid location, but the Image is Not present in the location specified in this key, then the Watermark will not be displayed in the PDF.

If the configuration key is set to a valid location and the Image is present in this location specified in this key, this image will be displayed as a watermark in the PDF of all the Documents/Service Notes that are in "In-progress" status.

Note:

If by chance the value of the key is updated with any value apart from the allowed values, the system will consider **the default behavior, i.e. same as the value "None" or blank.**

Pre-requisites:

1) A valid Image is available in the report server's main folder. And the System Configuration Key "DocumentsInProgressWatermarkImageLocation" is updated with the same Image name.

2) The System Configuration Key "DocumentsInProgressShowWatermark" is configured as 'Y'.

Where To Find It:

Path 1: 'Administration' – Configuration Keys – 'DocumentsInProgressShowWatermark'

Path 2: 'Administration' – Configuration Keys –'DocumentsInProgressShowWatermarkImageLocation'

Path 3: Log into SmartCare – Client Search – Documents/ Services/Notes – 'In Progress' status- Check the PDF.

How It Help's:

To ensure in-progress documents are visually distinct from signed/completed documents, an image watermark reading "In-Progress" is applied to the PDF.

Documents List Page

Reference No	Task No	Description
~~36~~	~~EII # 132511~~	~~The Core Assessment document description format displaying incorrectly on the Documents List page.~~

~~36. EII # 132511 (Feature # 606584): The Core Assessment document description format displaying incorrectly on the Documents List page.~~

~~**Note:** This is a Passive Change.~~

~~**What's Changed:**~~

~~This includes new description format for Core Assessment documents on the Documents screen by separating different attributes with semicolons (;) instead of spaces.~~

~~With this update, the document description format now displays attribute values separated by semicolons (;) for better clarity.~~

~~For example, the description will now appear as below:~~

~~**"Assessment (C) (Assessment Group: ICU; Population: DD, SUD; Classification: Classification1, Classification2)"** instead of showing all attributes with spaces.~~

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

~~**Path:** Client – 'Search and navigate to 'Assessments (C)' – Select Assessment Group – Select Population and Assessment Classification –- Enter the other details – 'Sign' – Navigate to 'Documents (Client)' list page.~~

~~**How this helps:**~~

~~Improves Clarity through Semicolons and ensures uniform format across all entries.~~

~~Foster Care~~

~~Reference No~~	~~Task No~~	~~Description~~
~~37~~	~~EII # 131928~~	~~Alerts users when Ending Placement and LOC is not Ended.~~

37. EII # 131928 (Feature # 562791): Alerts users when Ending Placement and LOC is not Ended.

Note: This is a Passive Change.

What's Changed:

SmartCare now supports enhanced validation on the '*Placement History Details'* screen. This passive change improves the functionality by enhancing a new warning pop-up with message to alert the user if the Placement End Date is earlier than the LOC Expiration Date or if the LOC Expiration Date is missing.

'*Placement History Details'* screen Enhancement:

A new warning pop-up has been implemented with the message:

Warning Message: "The system will continue to create services for billing until the LOC Expiration Date is reached."

When the 'Save' button is clicked, if the 'Placement End Date' is earlier than the 'LOC Expiration Date' or if the 'LOC Expiration Date' is missing, then the above warning pop-up will be displayed with message.

The warning message will have the 'Proceed' and 'Cancel' buttons.

Clicking the 'Proceed' button, will save the details entered.

Clicking the 'Cancel' button, this will keep the user on the same page without saving.

Where to Find It:

Path: 'My Office' – 'Placement History' – Click on 'New' icon -- 'Placement History Details' screen.

How It Helps:

- Alerts users that billing will continue to be processed by the system, even if the Placement End Date is earlier than the LOC Expiration Date.

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
12	TribalAffiliation
30	DocumentsCategory
31	SELFPRESERVSTATUS

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
7	SetErrorTypesToIdentifyNonBillableCodes
7	CascadePayerChargeErrors
7	CascadePayerChargeErrorsKeepPriority
12	ShowHideTribalAffiliateSectionOnDemographicsTab

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
1	ClientAccessRuleDaysAfterProgramDischarge
1	DisplayCDAGSectionInStaffDetails
1	EnableClinicalDataAccessGrouping
2	DisplayCDAGSectionInStaffDetails
2	EnableClinicalDataAccessGrouping
8	SetBilledReallocatedChargeToRebill
9	SetFolderPathForChargesClaimsAsynchDownloadProcess
15	DisplayClientChosenName
16	DisplayClientChosenName
17	DisplayClientChosenName
19	ShowValidationWhenAuthorReassignsADocumentOrServiceNote
32	DisplayCDAGSectionInStaffDetails
32	EnableClinicalDataAccessGrouping
33	DisplayCDAGSectionInStaffDetails
33	EnableClinicalDataAccessGrouping
35	DocumentsInProgressShowWatermark
35	DocumentsInProgressWatermarkImageLocation

Data Model Changes

Ref No.	Data Model Change
9	AsynchronousExportChargeFileHistory
12	Column TribalAffiliation is added to Clients table.
12	Column TribalAffiliation is added to DocumentRegistrationDemographics table.
23	PrimaryCareReviewOfSystemsDictionary

Ref No.	Data Model Change
24	PrimaryCareProcedureDictionary
25	PrimaryCareOrganSystemDictionary
26	PrimaryCareReasonForAppointmentDictionary
27	PrimaryCareNAndSReviewOfSystemsDictionary
28	PrimaryCareDictionary
29	PrimaryCarePhysicalExamDictionary
29	PhysicalExamLocationModifiers
29	PhysicalExamValueSets
29	PhysicalExamValues
30	Column DocumentCategory is added to DocumentCodes table.
31	Column SelfPreservationStatus is added to DocumentResidentialSelfPreservationAssessments table.
34	Columns HadBlackoutMemoryLoss', 'InjuredHeadAfterDrinking', 'HadConvulsionsDeliriumTremens', 'HadHepatitisLiverProblems'and 'UsedNeedlesToShootDrugs' are added to DocumentMSSISAScreenings table.

SmartCare Testing Strategy – October 2025 MSP – EII Focus

Purpose:
To confirm that key workflows in each module function correctly after the release, focusing specifically on **Engineering Improvement Initiatives (EIIs)**. Testing should validate both active changes (requiring customer setup/action) and passive changes (enabled by default but beneficial to verify).

How to Use This Strategy

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

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

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

Testing Workflow by Module – EIIs Only

Below are the EIIs identified in the release-note excerpts provided.

Appeals & Grievances

- **EII #132276 –** CDAG Program Dropdown without Discharge Date now displays correctly in Appeals and Grievances Details.
  Test:

- Navigate to Appeals & Grievances Details.

- Confirm dropdown behavior displays correctly whether client has a discharge date or not.

Authorizations

- **EII #131000** – Updates implemented on the Service Request List Pages.
  Test:

- Validate revised filters, columns, and navigation.

Care Coordination

- **EII #132185 –** New Care Coordination tool added to Inquiry Details.

- **EII #132263 –** Link to Client Contact Note Details screen (unhidden).

- **EII #132213 / #132331 –** New Care Coordination icon added in Documents, Service Notes, and Crisis Call Log.
  Test:

- Confirm icons appear as expected.

- Validate links navigate correctly and permissions allow viewing.

Charges / Claims

- **EII #132400 –** New Plan Rule to send 0Fill segments and suppress adjudication info.

- **EII #129625 –** New configuration key SetBilledReallocatedChargeToRebill.

- **EII #130591** – Ability to export charges/claims in correct formats, supporting large record volumes.
  Test:

- Validate export file formats.

- Confirm plan rules behave as expected.

~~Core Assessment~~

- ~~**EII #131856 –** ASAM Summary Button now correctly initializes ASAM Final Determination Tab.~~
  ~~**Test:**~~

- ~~Open Core Assessment and confirm tab initialization works.~~

Dynamic Form Architecture (DFA)

- **EII #128040 –** Fix for document authorship/security role mismatch.

- **EII #132296 / #131985 –** Problem List dropdown and common control enhancements.

- **EII #130990 –** Disposition common control added to DFA.
  Test:

- Validate Problem List/Disposition behaviors across DFA and non-DFA documents.

Dictionaries

Several EIIs update dictionary setup pages:

- **Review of Systems (129944)**

1. **Procedures (131955)**

2. **Organ Systems (131958)**

- **Reason for Appointment (131959)**

- **N&S Review of Systems (131960)**

- **Dictionary List Page (132099)**

- **Physical Exam (129945)**

Test:

- Validate that new dictionary items display and can be edited or assigned appropriately.

Document Codes

- **EII #132291 –** Document categorization via "Document Category" field + new filtering.
  Test:

- Confirm documents filter correctly by category.

Documents

- Includes changes to:

- ~~**Self-Preservation Status field (130726)**~~

- **CDAG Program Dropdowns (131030)**

- **USCDI Summary of Care (131712)**

- ~~**MSSI-SA (131720)**~~

- **Watermarking "In Progress" (#132345)**

- ~~**List Page formatting (132511)**~~

Test:

- Verify new field formats.

- Validate CDAG dropdowns.

- Confirm watermark displays.

~~**Foster Care**~~

- ~~**EII #131928** — Alert when Ending Placement but LOC not ended.~~
  ~~**Test:** Trigger scenario and verify alert.~~

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	October 2025 MSP